



Commonwealth Cares for Children (C3) Survey Findings

Please note these slides are from the
Board of Early Education & Care
December Meeting that occurred on
December 13, 2022 and are not inclusive
of all survey data.

C3 Fall 2022 Survey Overview

In September, EEC launched the third in a series of surveys to gather additional information about programs' use of C3 grant funds, ongoing financial needs, investments in educators, and services provided to families.

The fall survey launched on September 28 and providers were required to complete the survey when they applied for their next monthly C3 grant.

This analysis includes responses from 6,010 providers (78%) that completed the survey prior to November 10, 2022. Respondents include:

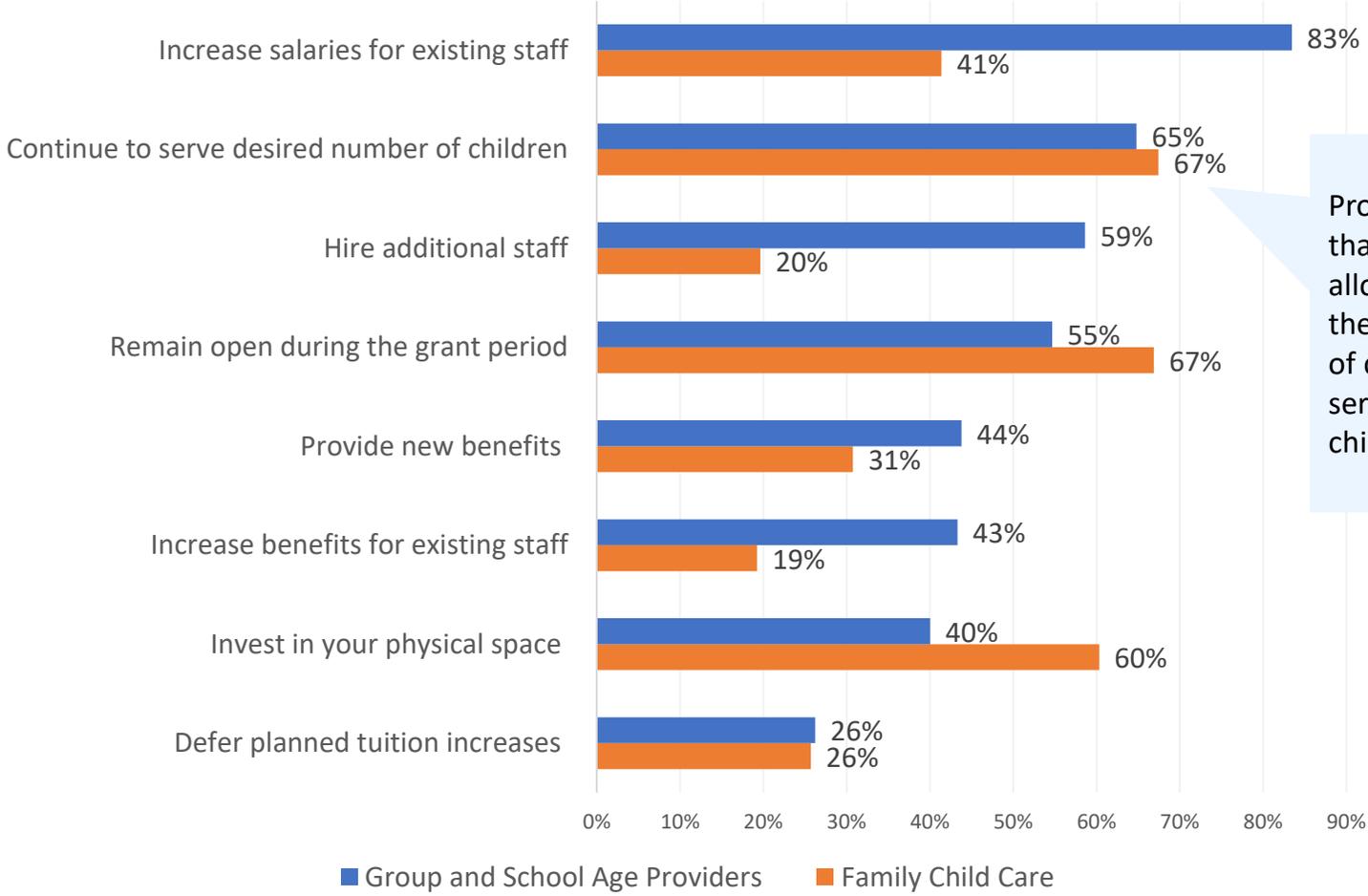
- 2,103 GSA programs (73%)
- 3,907 FCC programs (81%)
- 3,757 programs (87%) that serve children with subsidies*

Response rates by region range from 76% on the Southeast and Cape to 82% in Western MA.

*Note: For purposes of this survey analysis, "serve children with subsidies" is defined as a program that served a child with a subsidy in Feb 2020, May 2021, Nov 2021, March 2022, June 2022, and/or Sept 2022, as these are the points in time incorporated into the C3 formula.

C3 funds have helped programs remain open and serving children, hire staff, invest in staff and facilities, and defer family tuition increases

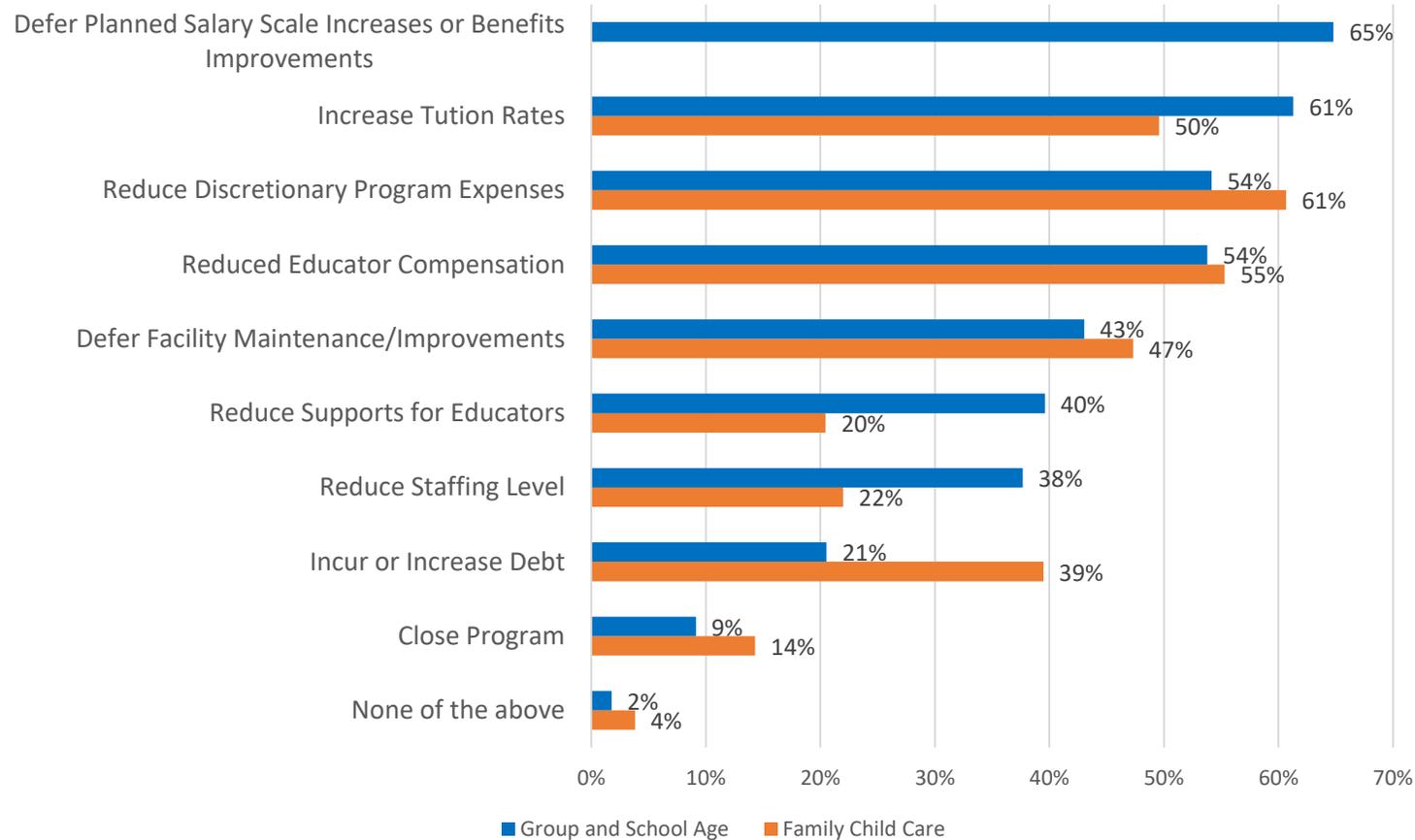
C3 Grants Funds Allowed My Program to...



Programs that report that grant funding allowed them to serve their desired number of children collectively serve over 100,000 children.

Families and educators would be significantly impacted if C3 funds were no longer available

Changes Providers Report that They Would Have to Make if C3 Were No Longer Available



Many programs report that they would close if C3 funds were no longer available

Across the **751 providers** that report that they would have to close...

15,078

licensed seats

38%

are in the highest SVI communities (SVI > 0.75)

65%

serve children with subsidies

74%

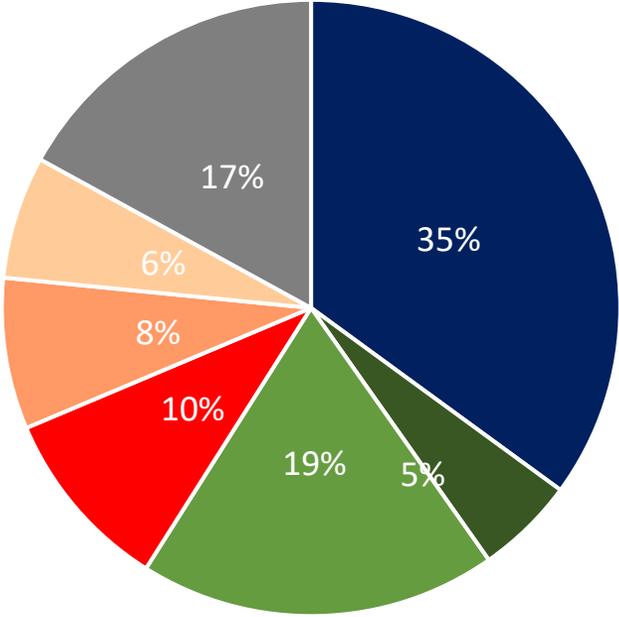
are family child care providers

35%

do not serve children with subsidies

Providers continue to spend the majority of C3 funding on existing operational expenses

Grant Spending by Category,
July 2021 to October 2022



- Existing Payroll and Benefits
- Other Operational Expenses
- Bonuses
- Unspent
- Past Costs
- Salary/Benefit Increases
- Other New Investments

Operational Spending

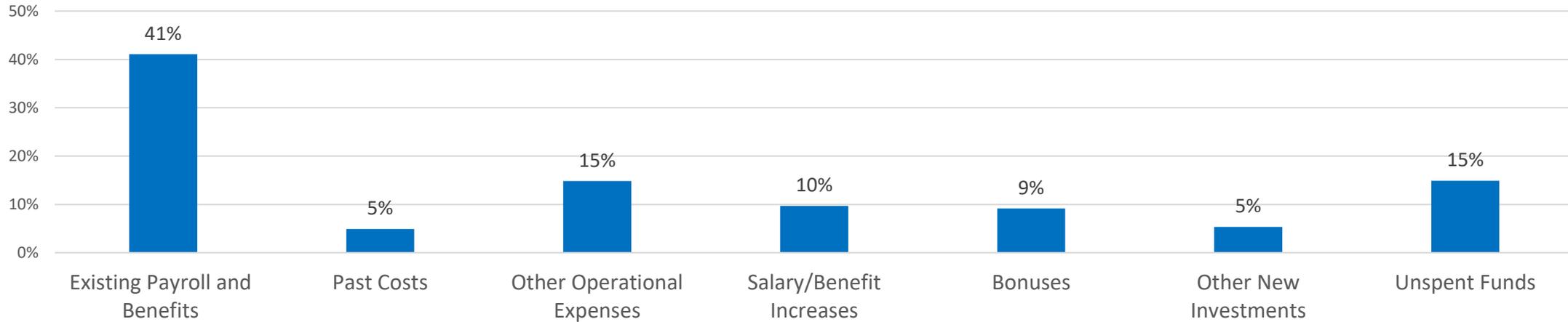
To date, providers have spent almost 60% of all grant funds awarded on operational expenses (compared to 66% at the same time last year).

New Investments

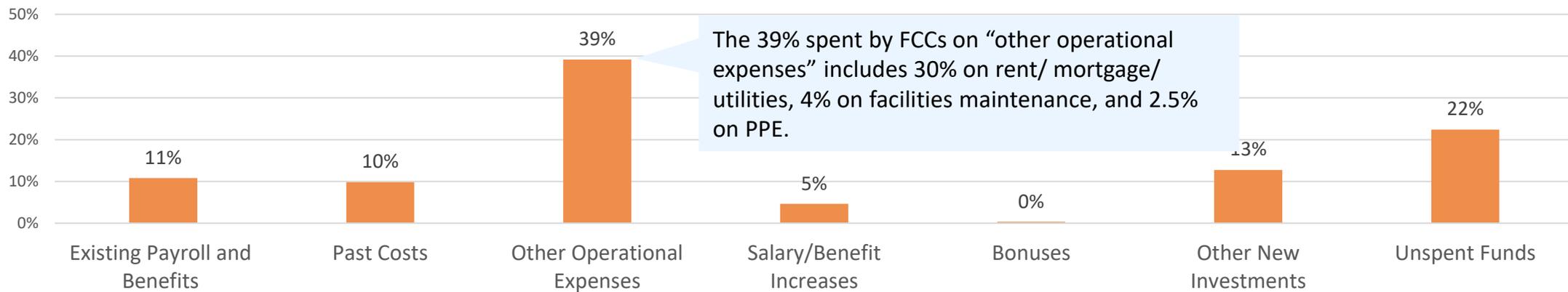
Providers have invested 24% of grant funding in new investments (compared to 20% at the same time last year).

Operational Investments Vary By Program Type

Grant Funds Expended by GSAs Through Oct 2022, by Category



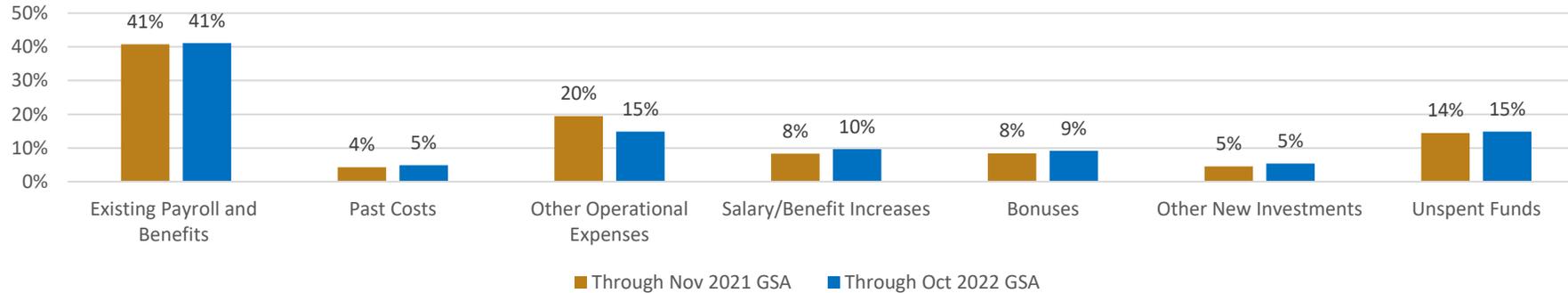
Grant Funds Expended by FCCs Through Oct 2022, by Category



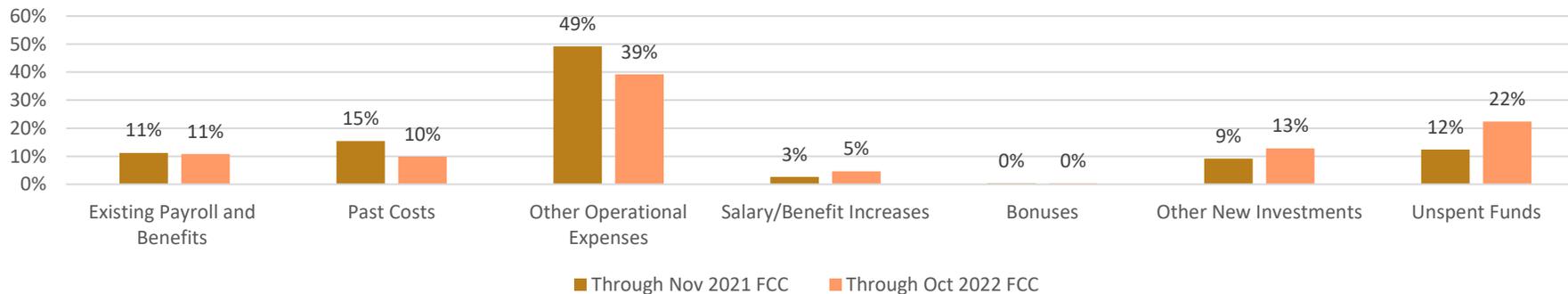
Spending patterns are consistent over time, with a slight shift from expenditures on existing operations to new investments

Overall, GSA programs continue to spend the largest share of C3 funds on existing payroll and benefits. Across program types, a smaller share of grant funds are being spent on other operational expenses (e.g., rent, mortgage, utilities, supplies) and GSA programs are spending slightly more funds on compensation increases over time.

Group and School Age Program Grant Spending Over Time

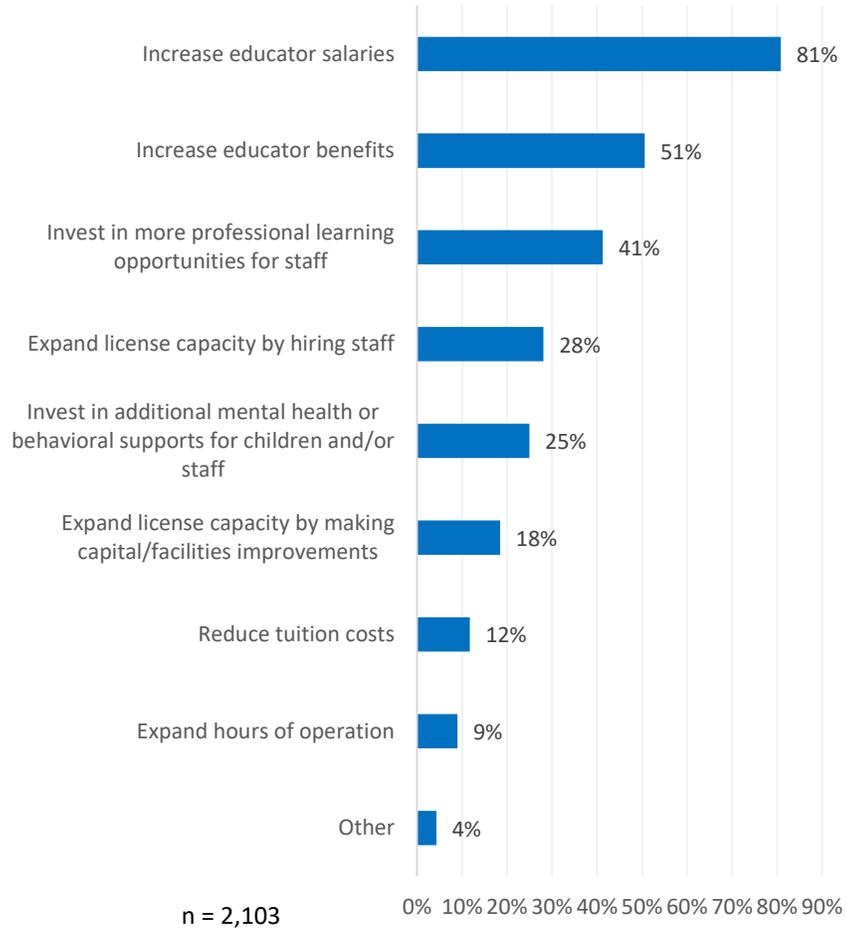


Family Child Care Provider Grant Spending Over Time

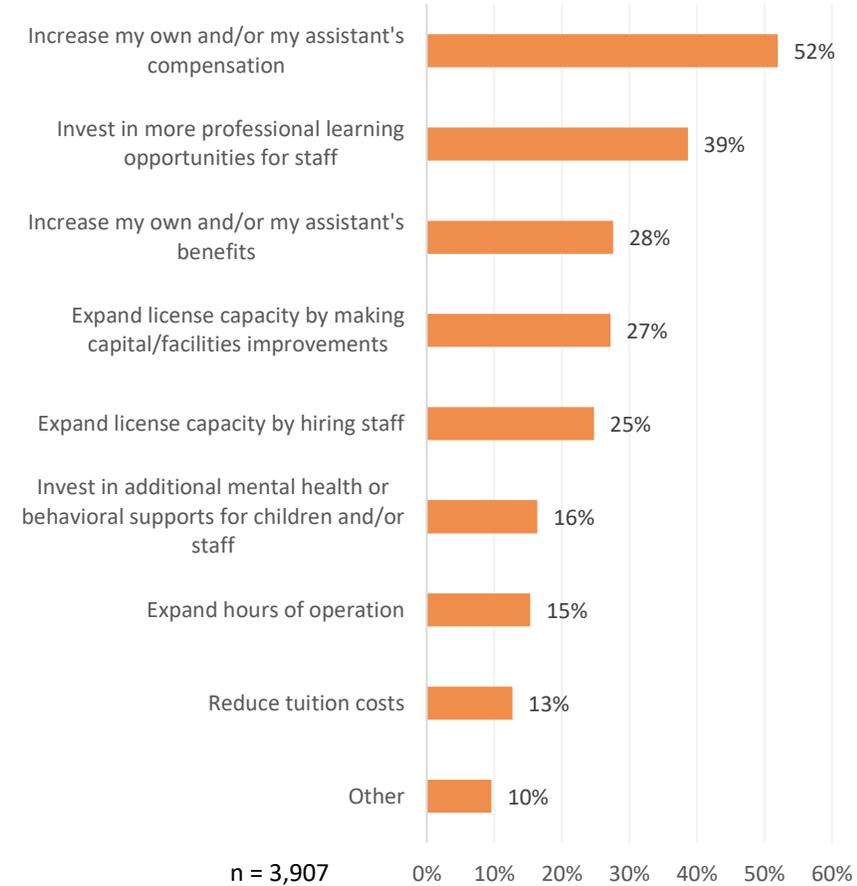


Most providers report that they would prioritize educator compensation and professional learning if the grant is extended

Activities that GSAs will prioritize if C3 funding were to continue



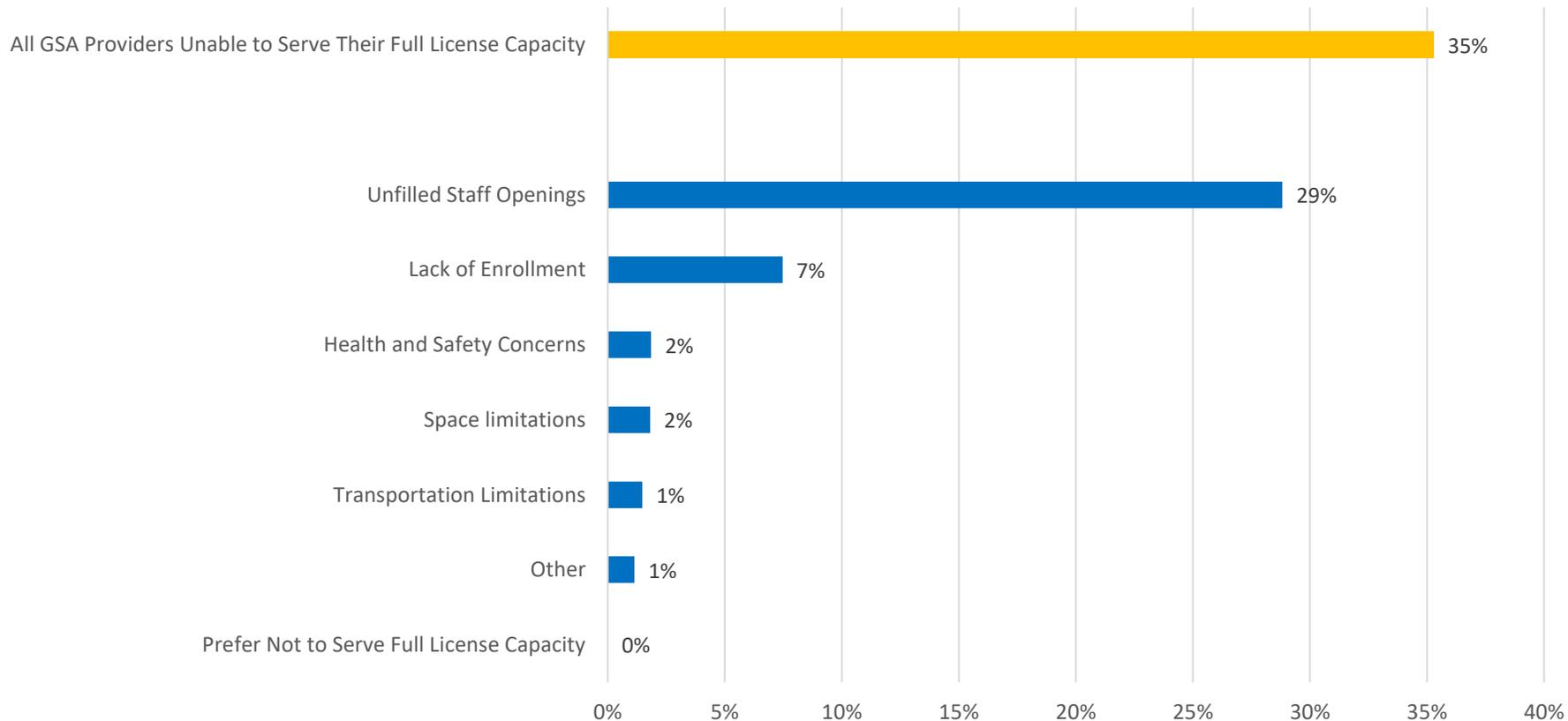
Activities that FCCs will prioritize if C3 funding were to continue



Overall, more than one-third of GSA providers report being unable to serve their full license capacity

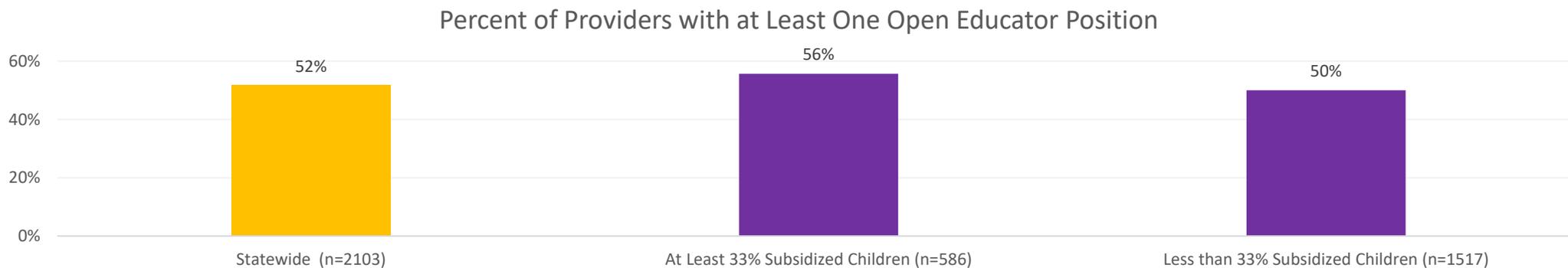
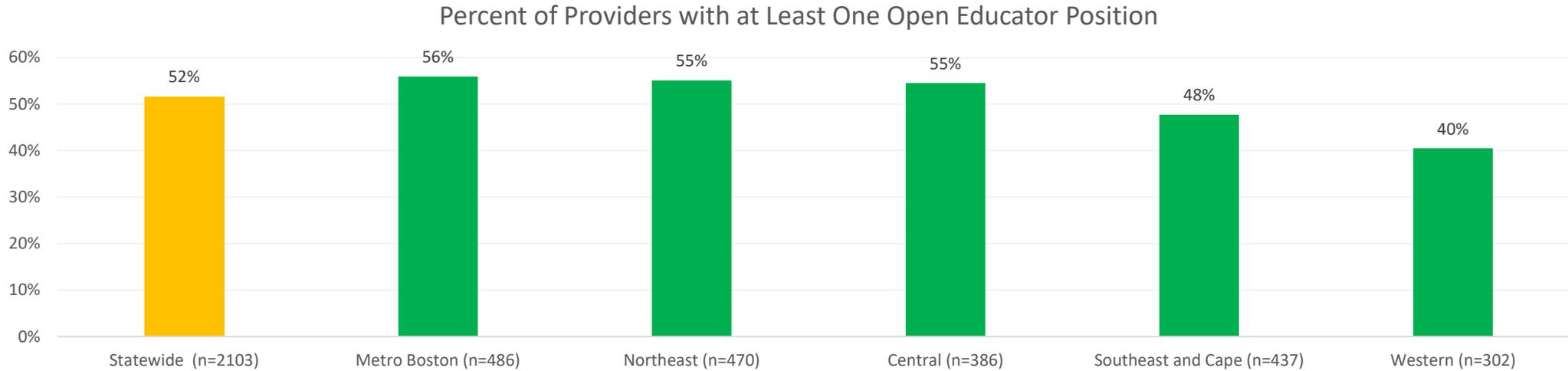
The proportion of GSA providers that **are unable to serve their full capacity has increased** since the spring (from 28% to 35%). If these programs were fully staffed, they **could serve between 10,000 and 15,000 more children.**

Factors Limiting GSA Programs' Ability to Serve their Full License Capacity



Providers Continue To Report Staffing Shortages

More than half (52%) of GSA programs report that they are currently hiring for at least one open educator position. Among these programs, the average program is hiring for 3.6 positions.



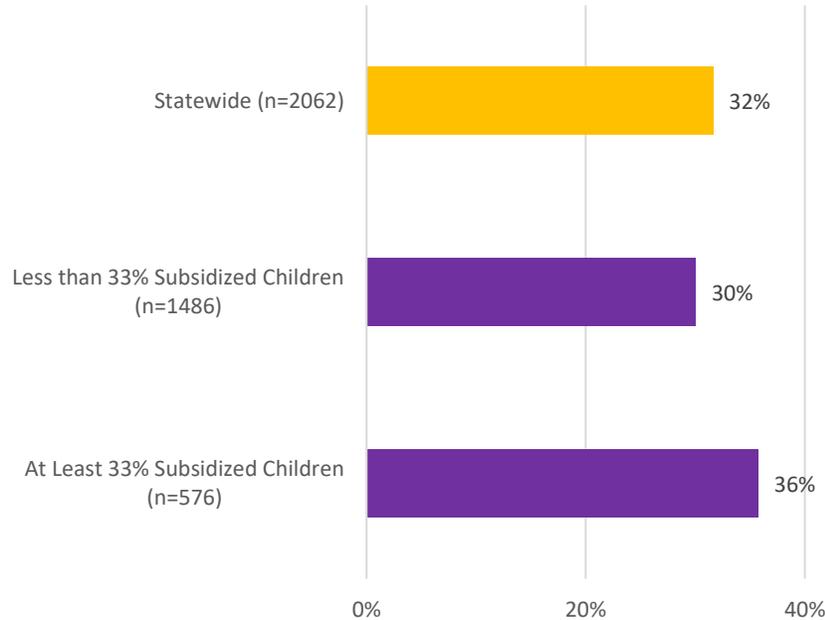
About 12% Of All GSA Positions Statewide Are Currently Open

Role	Number of Open Positions Statewide	Percent of All Open Positions Statewide	Percent of All Positions that are Currently Open
Teacher	2,022	51%	12%
Assistant Teacher	1,219	31%	17%
Group Leader	393	10%	14%
Assistant Leader	175	4%	12%
Site Coordinator	53	1%	6%
Center Director	45	1%	2%
Program Administrator	28	1%	3%
All Positions	3,935	100%	12%

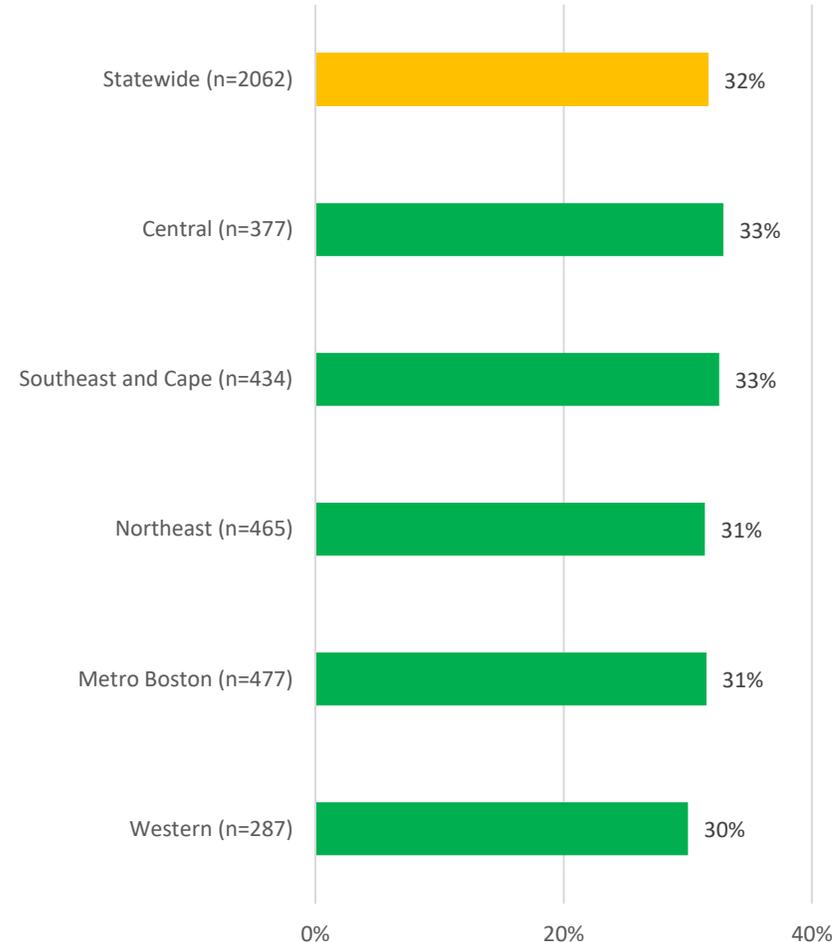
Providers report 2,022 open teacher positions, which make up 51% of all open positions and 12% of all teacher positions statewide.

Almost 1/3 of educator positions have turned over in the past year

Educator Turnover Rates



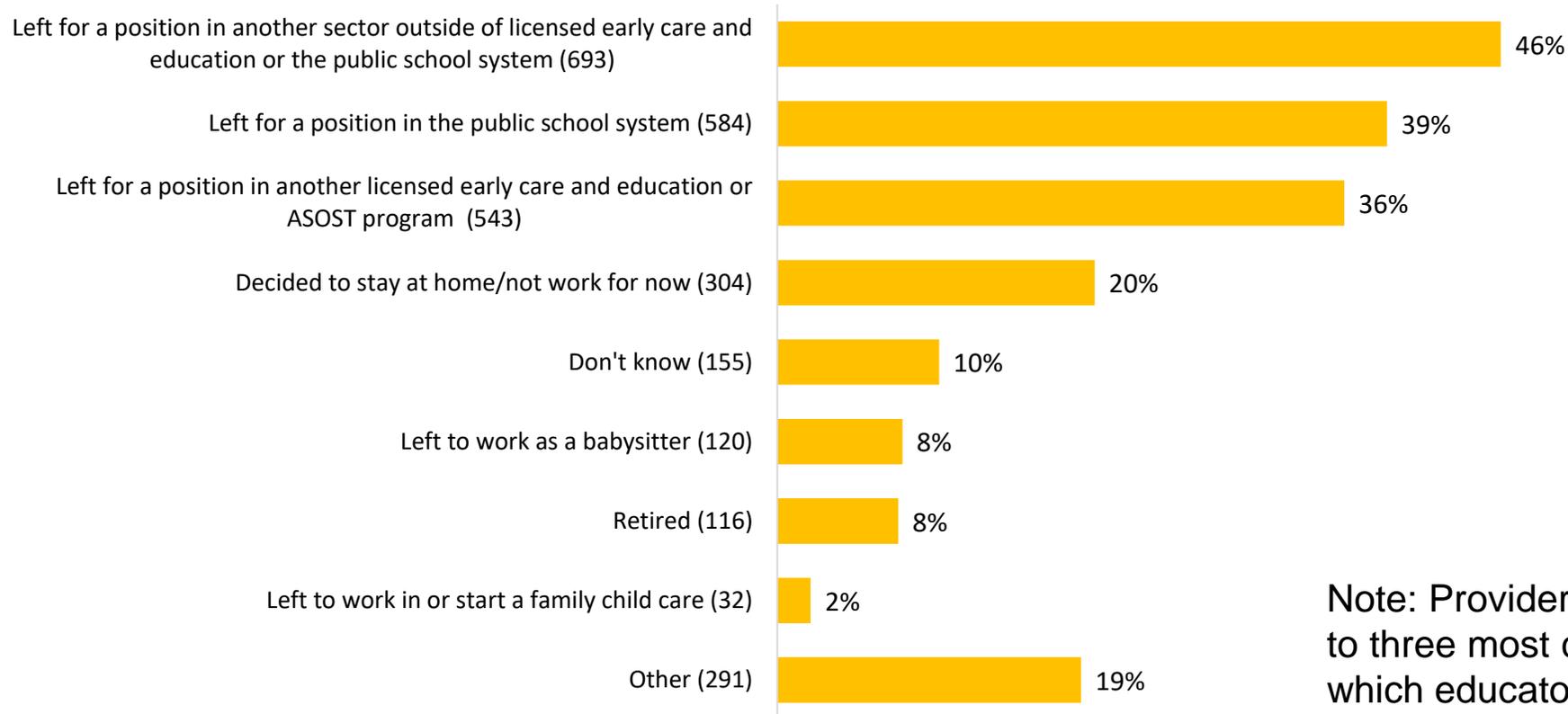
Educator Turnover Rates



Educator turnover: The % of educators (all educator roles) employed 12 months ago who are no longer employed by the program.

Providers report losing educators to opportunities outside of the ECE system, as well as to public schools and other ECE programs

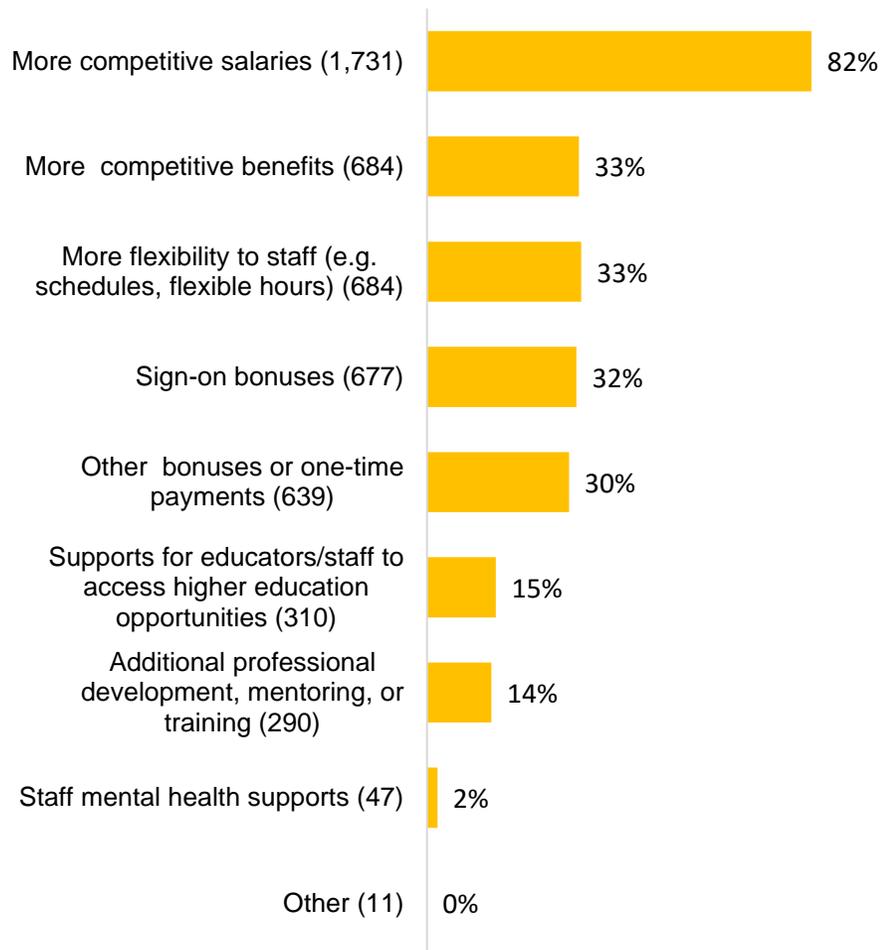
Most Common Reasons Reported for Educator Turnover



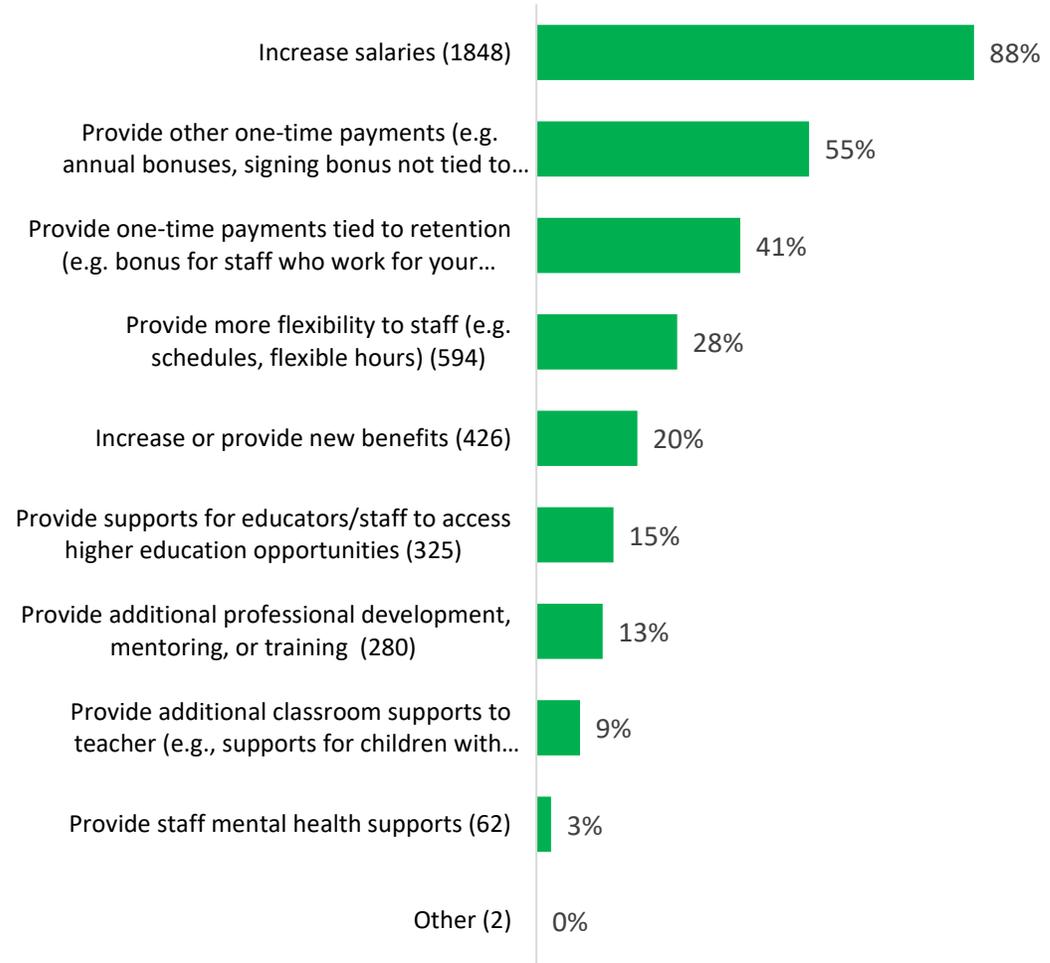
Note: Providers were able to select up to three most common reasons for which educators left their programs.

The most frequent recruitment and retention strategy is improving staff compensation

Strategies to Recruit New Staff (N = 2103)



Strategies to Retain Staff (N= 2103)



Most GSA providers increased educator salaries since July 2021

Almost all (94%) of GSA programs provided salary increases (with C3 funds and/or funds from other sources). Just under two-thirds (62%) used C3 funds to increase salaries and just over two-thirds (68%) of GSA providers provided salary increases to all educators.

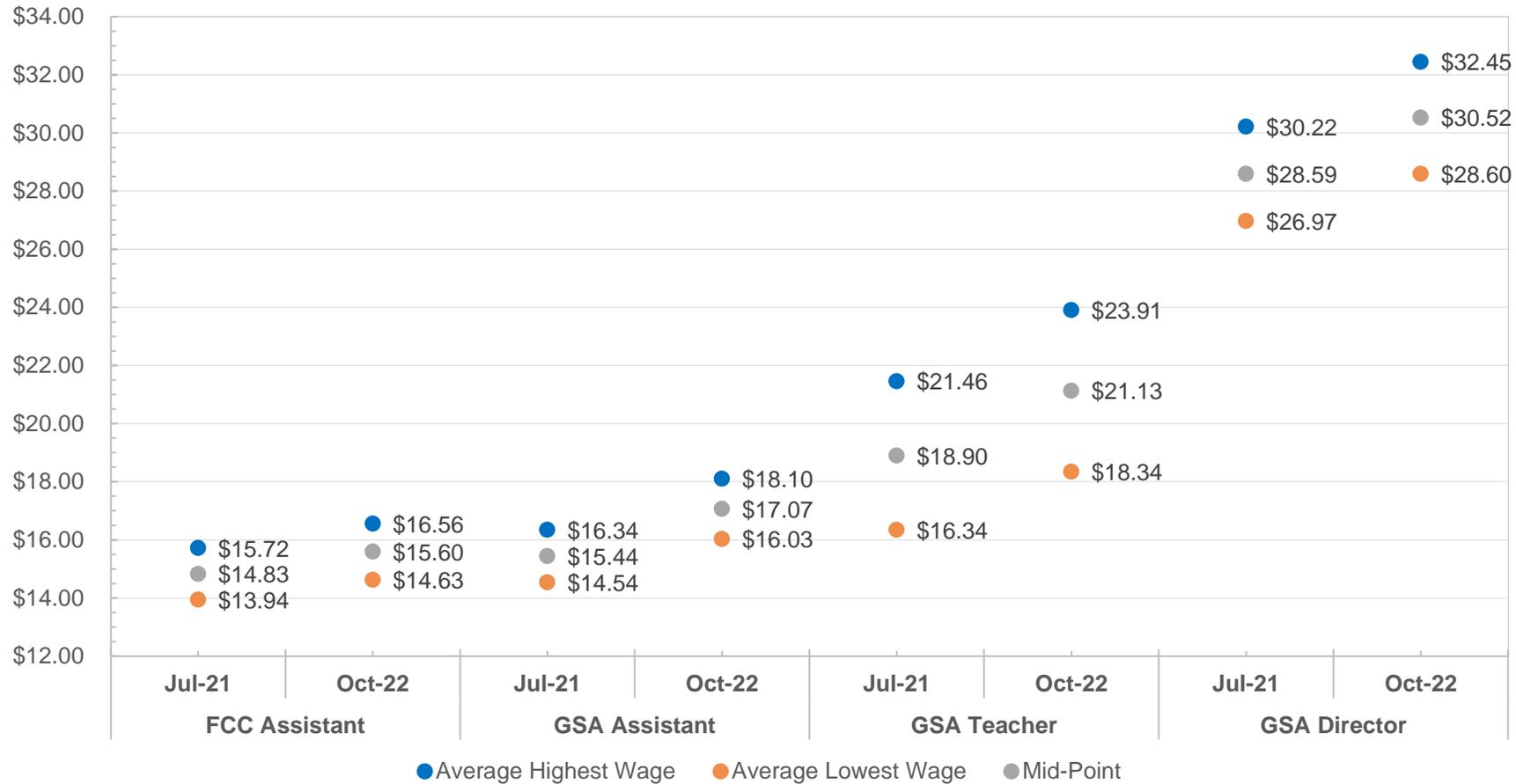
Provided salary increases to all educators	Targeted salary increases by role (e.g. assistants, teachers)	Targeted salary increases by years employed at my program	Targeted salary increases to degrees or other professional accomplishments/credentials	Targeted salary increases by performance
68%	14%	11%	6%	10%

Of the 14% of providers that targeted salary increases based on roles, most targeted salary increases to Teachers, Assistant Teachers, and/or Center Directors.

Assistant Teacher	Teacher	Center Director	Site Coordinator	Program Administrator
60%	86%	42%	20%	20%

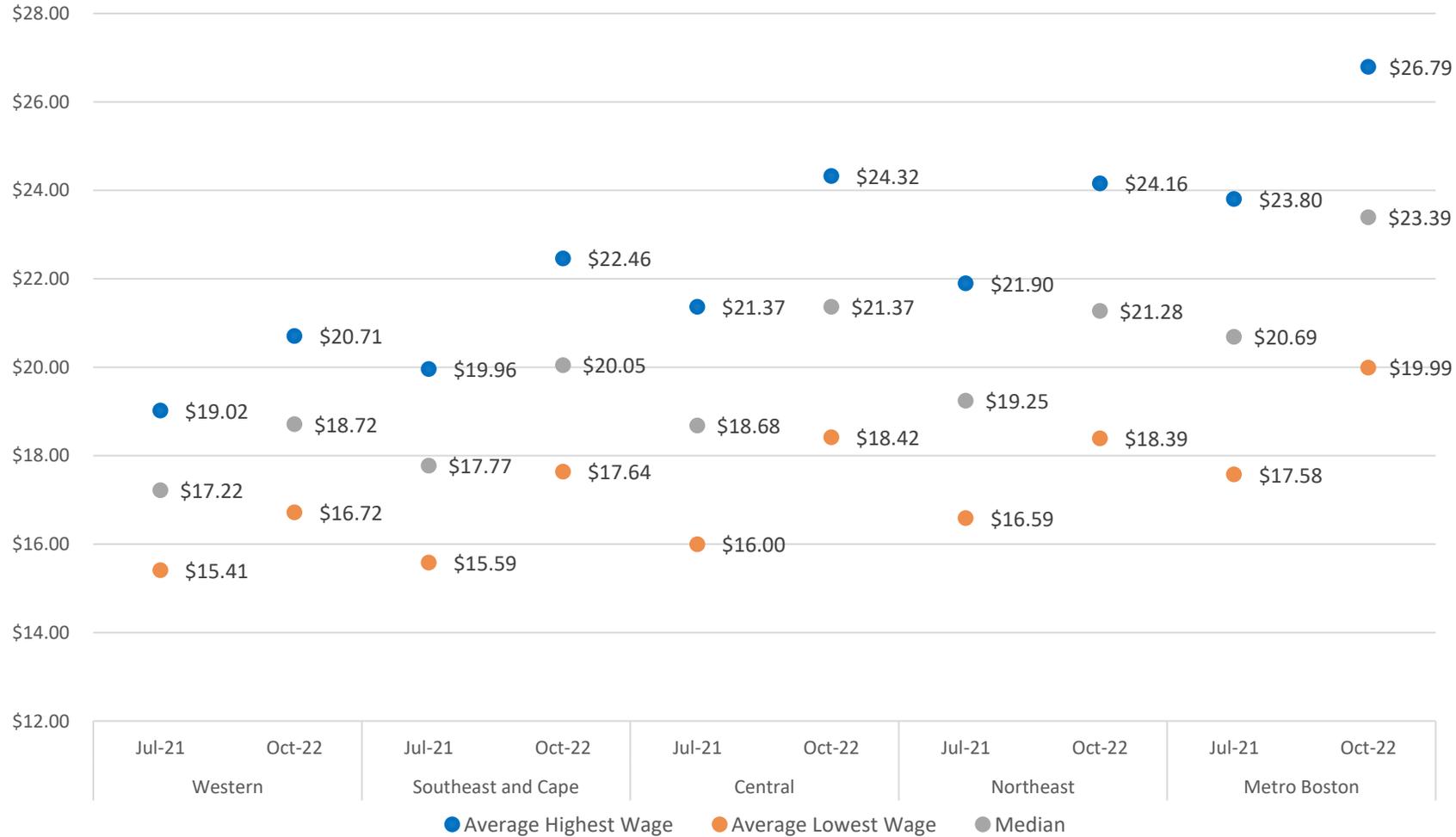
Educator hourly pay is increasing over time yet remains low

Educator Average Highest and Lowest Hourly Pay Over Time

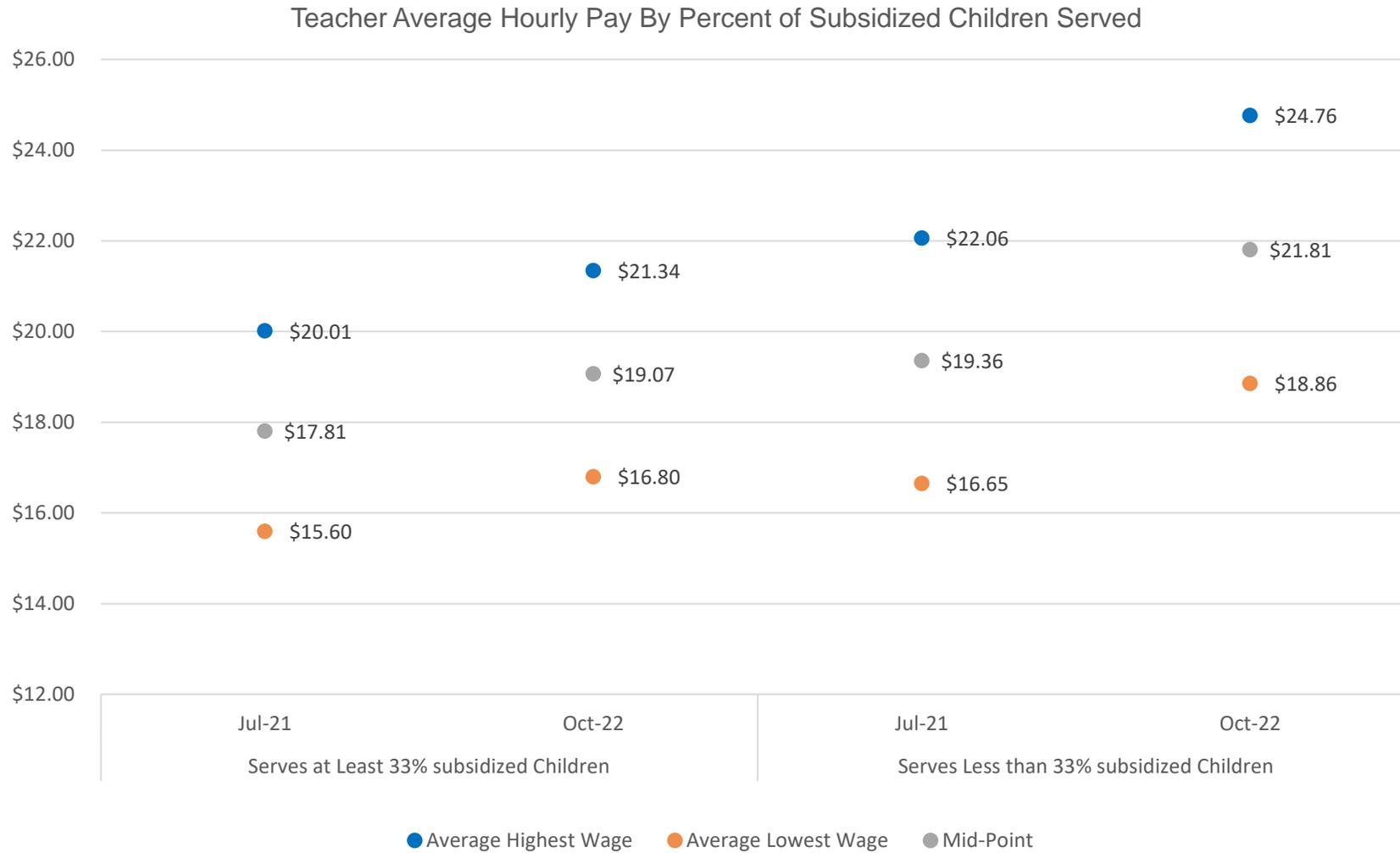


Educator hourly pay varies by region

GSA Teacher's Average Highest and Lowest Hourly Pay By Region Over Time

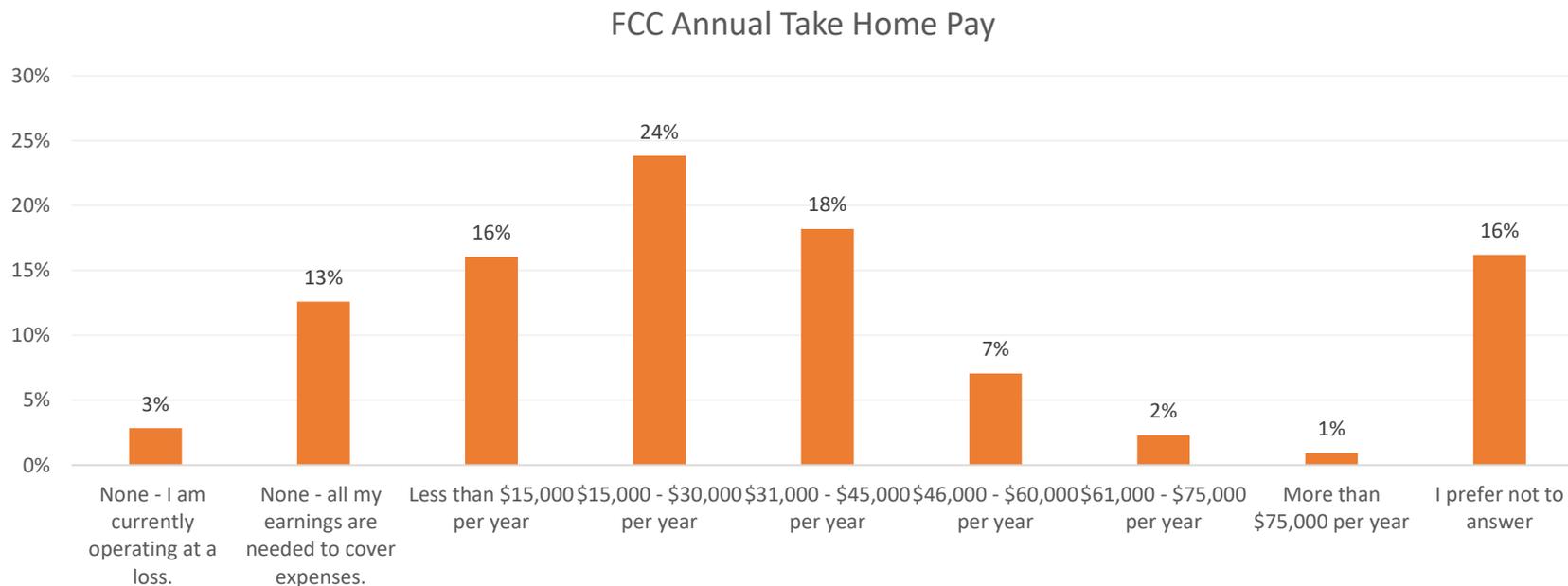


Educator hourly pay is lower in programs that serve more subsidized children



FCCs report low annual take home pay and long hours

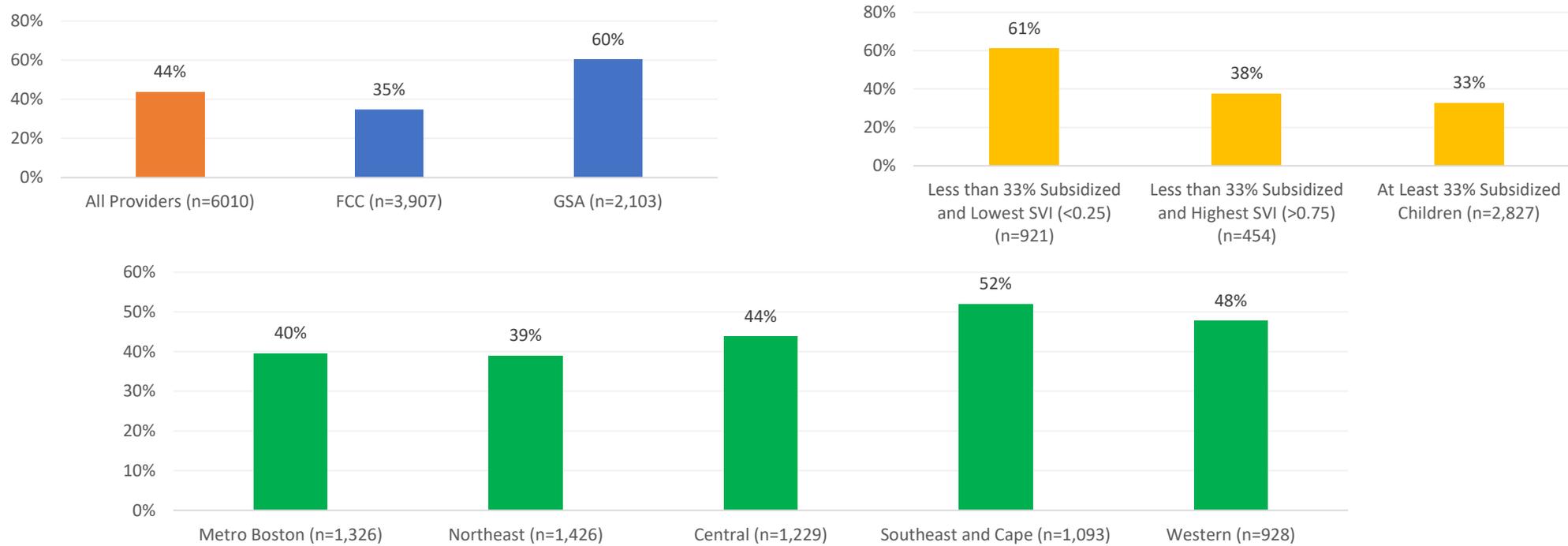
About one-quarter of FCC providers report **earning between \$15,000 and \$30,000 per year**, after subtracting all bills and expenses, and 16% (more than 600) report either operating at a loss or using all earnings to cover expenses.



More than half (53%) of FCC licensees report **spending between 41 and 50 hours per week with children**, and almost half (45%) report an additional **6-10 hours per week on other tasks** related to running their program outside of their time with children.

Almost half of providers have a waitlist for enrollment

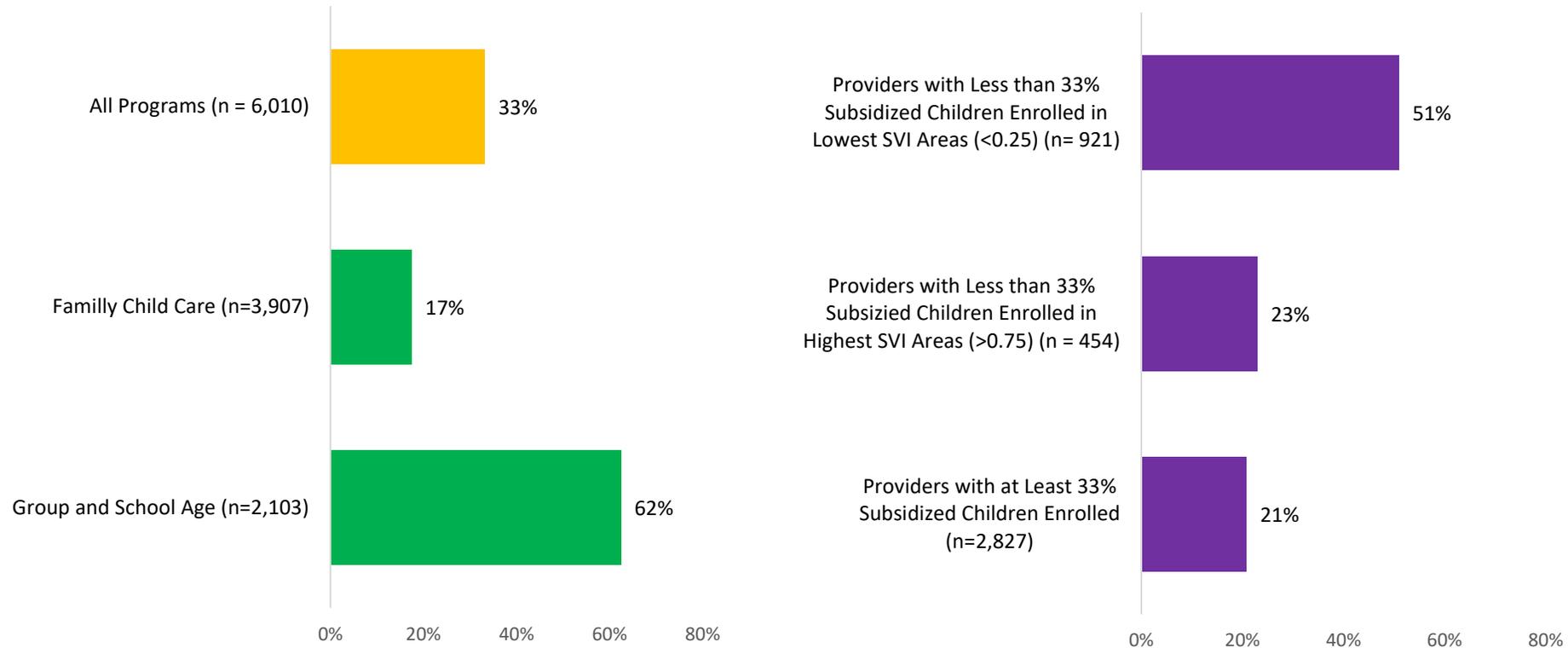
Percent of Providers with a Waitlist



While 44% of providers statewide report having a waitlist, they are more common among GSA providers (compared to FCCs), as well as for providers with lower subsidy enrollment in the lowest SVI areas.

FCCs that have a waitlist for enrollment report an average of **9 children on the waitlist**, and **GSAs** that have a waitlist report an average of **43 children on the waitlist**.

About one-third of programs have raised tuition in the past year

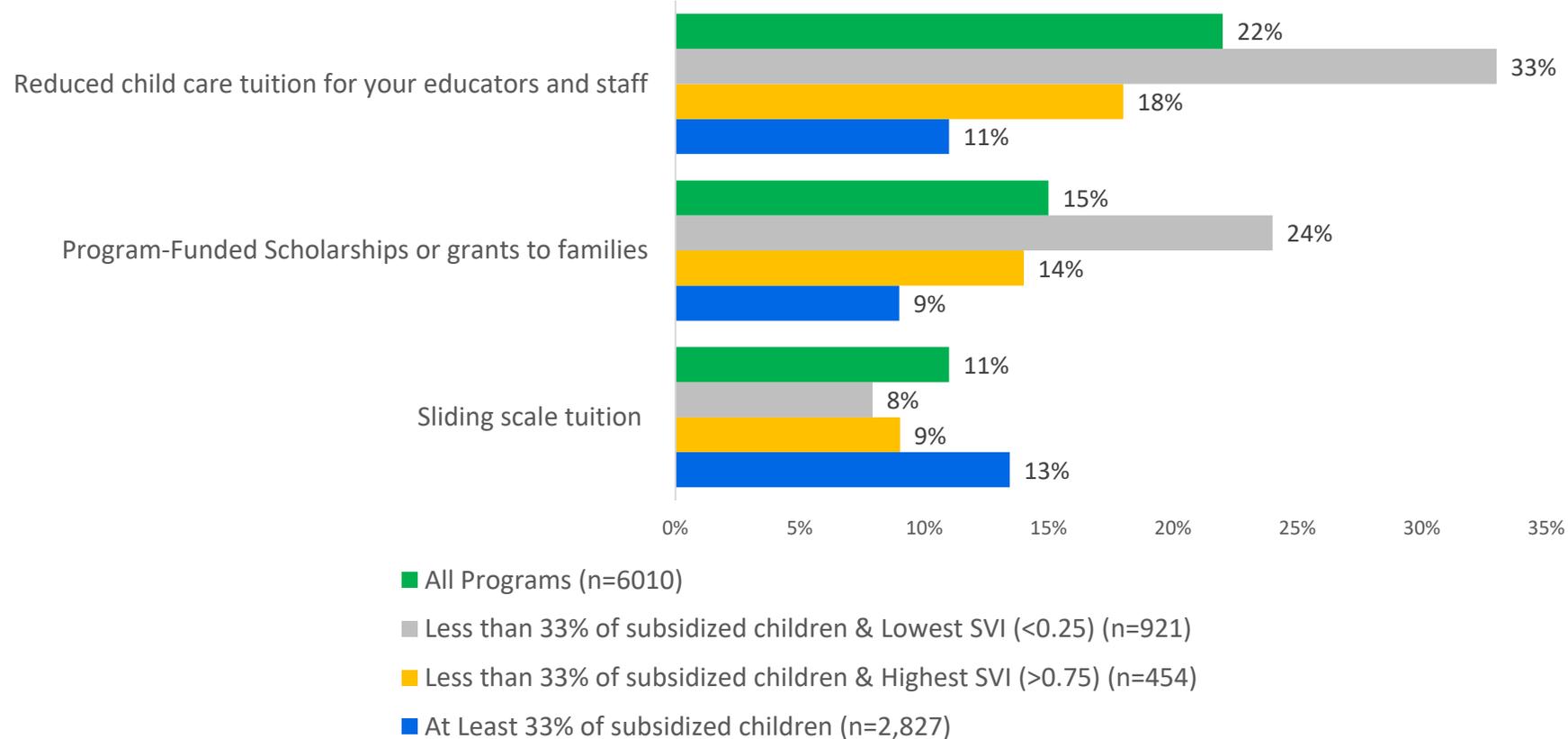


Across all provider types, most providers **report raising tuition rates between 0-5%** and that they do not raise tuition on a consistent schedule.

During recent focus groups, **programs (particularly FCC providers) noted that they do not want to increase tuition rates for families** and emphasized the importance of stable tuition rates to support families.

Almost half (44%) of programs report providing financial assistance to families beyond EEC subsidies

Types of financial assistance provided to families include....



Providers located in lower SVI areas that serve a smaller proportion of subsidized children are more likely to provide other types of additional financial assistance to families, including program-funded scholarships and reduced child care tuition.