

A background image of numerous colorful wooden blocks (red, yellow, blue, green) scattered on a white surface. A dark red horizontal bar is overlaid across the middle of the image, containing the title text. The number '3' is enclosed in a white circle on the left side of the bar.

3

Commonwealth Cares for Children (C3) Survey Findings

Please note these slides are from the
Board of Early Education & Care
September Meeting that occurred on
September 13, 2023 and are not inclusive
of all survey data.

Spring 2023 C3 Survey Overview

In March, EEC launched the fourth in a series of surveys to gather additional information about programs' use of C3 grant funds, ongoing financial needs, and issues facing the workforce and families.

The spring survey launched on March 31, 2023 and providers were required to complete the survey when they applied for their next monthly C3 grant.

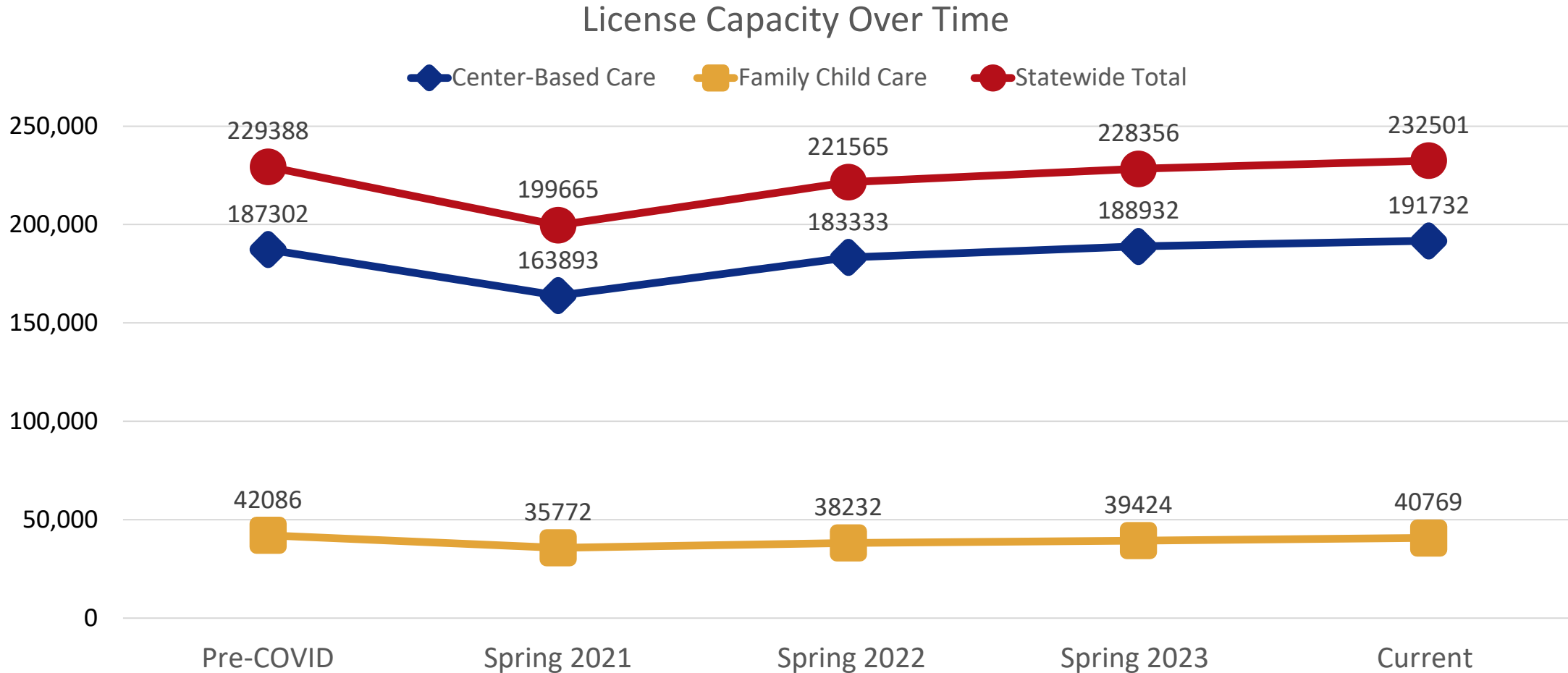
This analysis includes responses from 6,806 providers (87%) that completed the survey prior to July 31, 2023. Respondents include:

- 2,577 center-based care programs (88% of all CBC providers statewide)
- 4,229 family child care programs (86% of all FCC statewide)
- 4,414 programs (96% response rate) that serve children receiving EEC Child Care Financial Assistance*

Response rates by region range from 85% in the Southeast and Cape to 89% in Western MA.

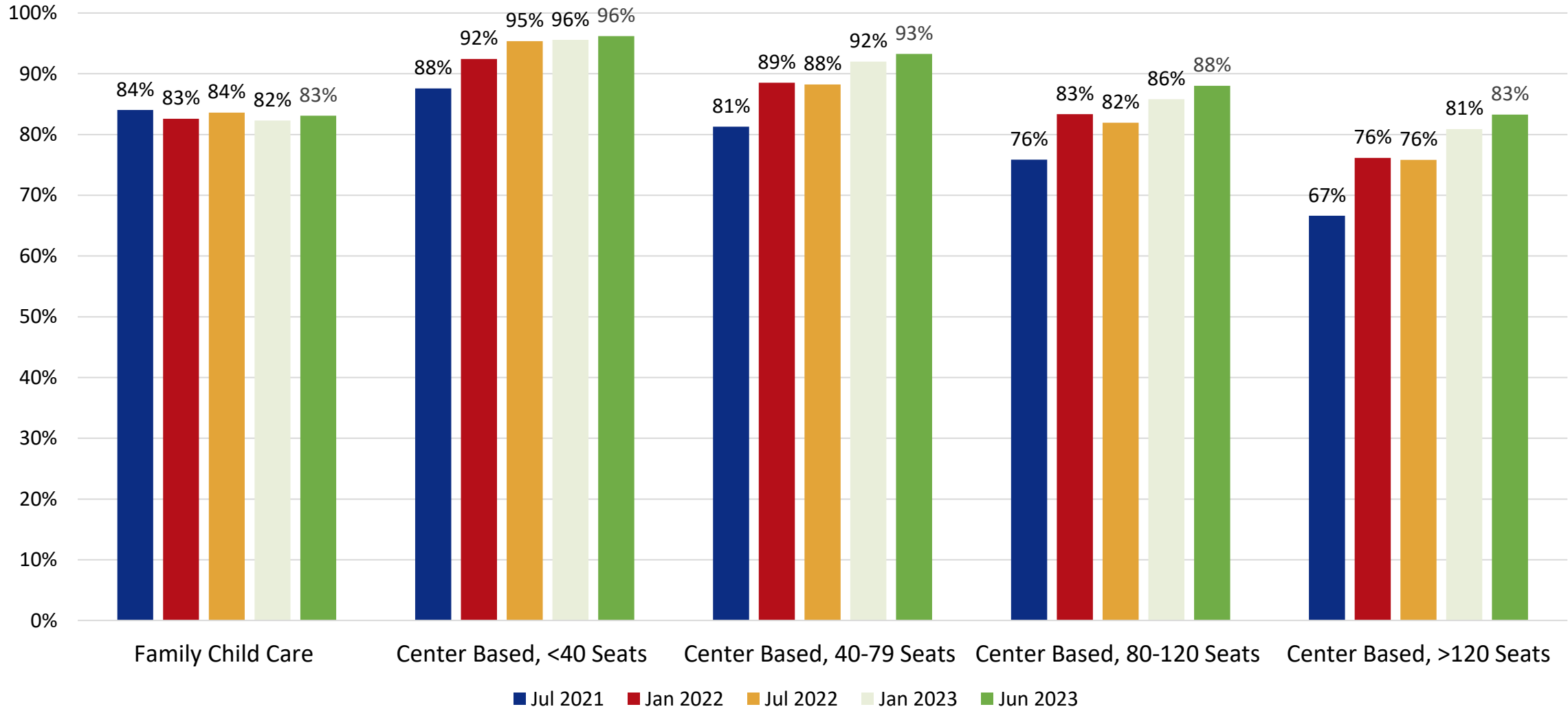
*Note: For purposes of this analysis, "serve children receiving EEC child care financial assistance" is defined as a program that served a child with child care financial assistance in Feb 2020, May 2021, Nov 2021, March 2022, June 2022, Sept 2022, Dec 2022, and/or March 2023, as these are the points used in the C3 formula.

Licensed capacity continues to rebound.

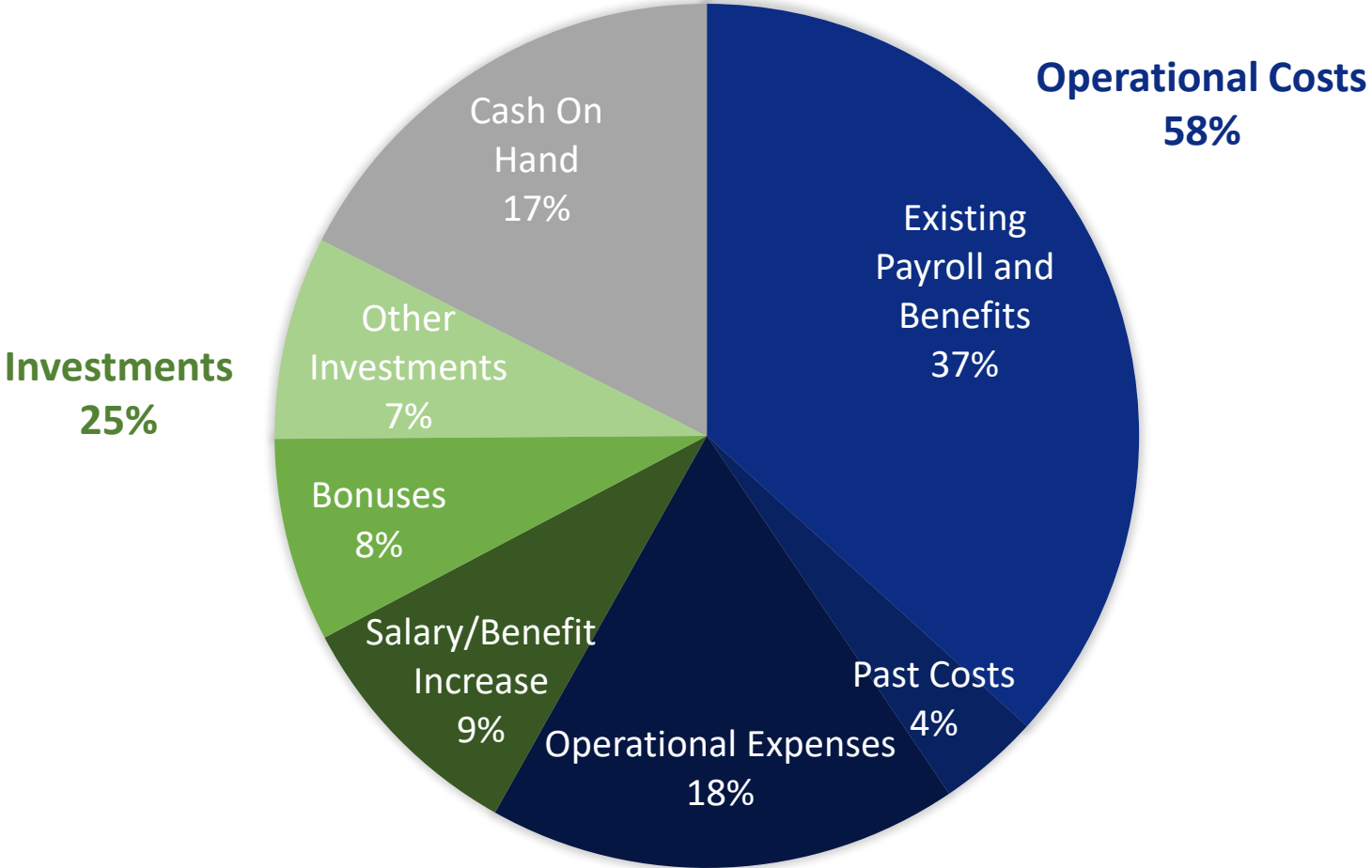


Program enrollment is continuing to stabilize.

Percentage of License Capacity Enrolled



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



Operational Costs

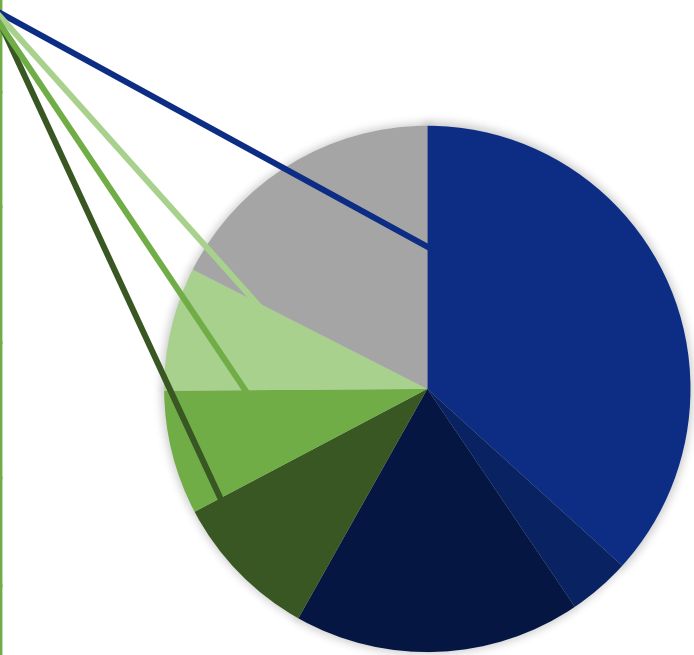
To date, programs have spent 58% of grant funds on operational expenses over time (compared to 65% at the same time last year).

New Investments

Programs report spending 25% of total grant funds on new investments (compared to 20% at the same time last year).

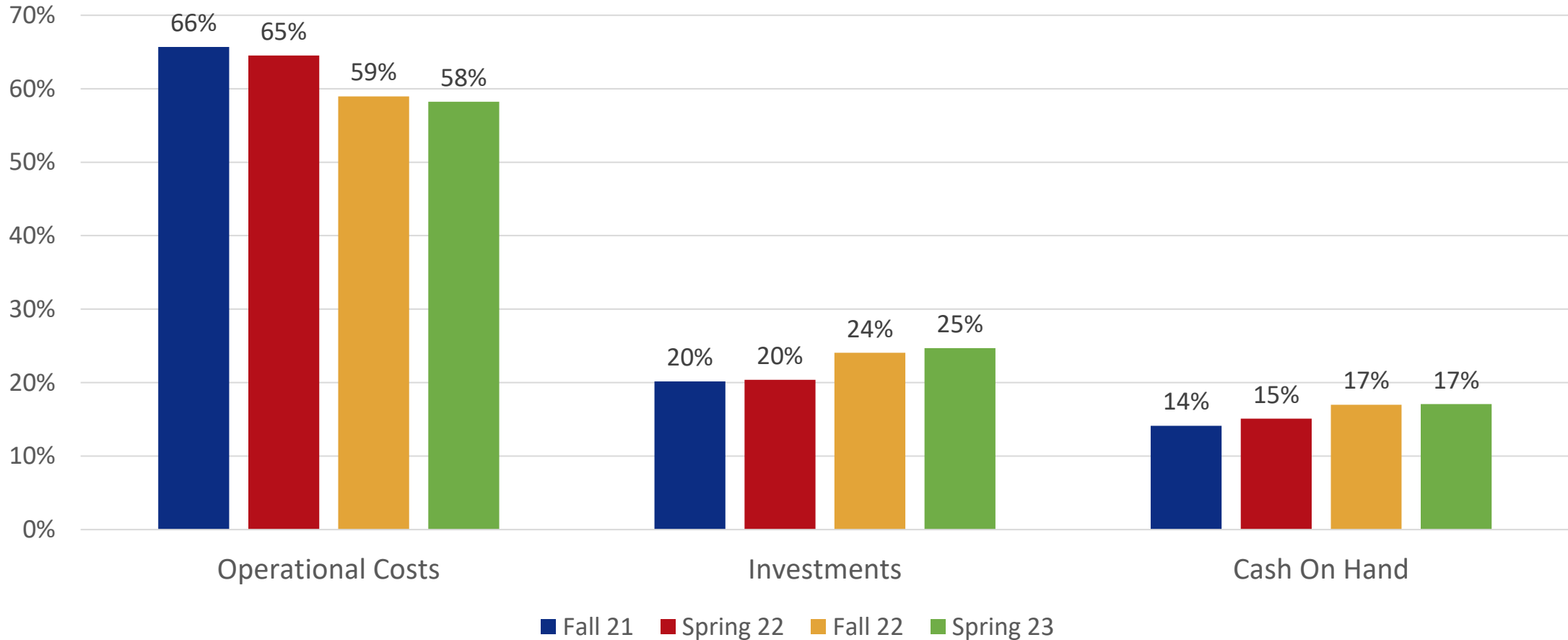
Over 50% of C3 funds to date have been spent on workforce compensation and supports.

Workforce Spending	% of Total C3 Grants
Existing payroll and/or benefits	37%
Increased compensation for educators through salary increases	9%
Increased compensation for existing educators through one-time payments	8%
Incentives to attract or hire new staff	1%
Access to additional training and mental health supports for staff	1%
Total Spending	55%



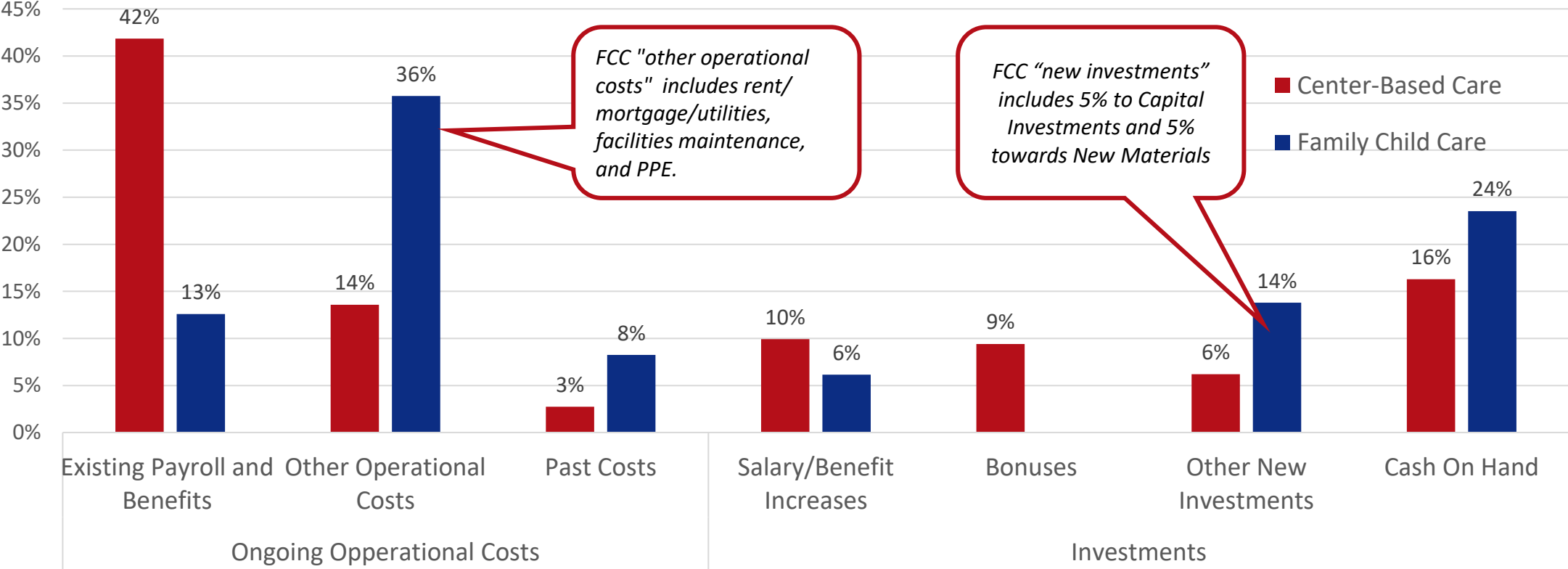
Over time, programs are spending a smaller proportion of funds on ongoing operational costs and a higher proportion on investments.

C3 Broad Spending Categories: Changes Over Time



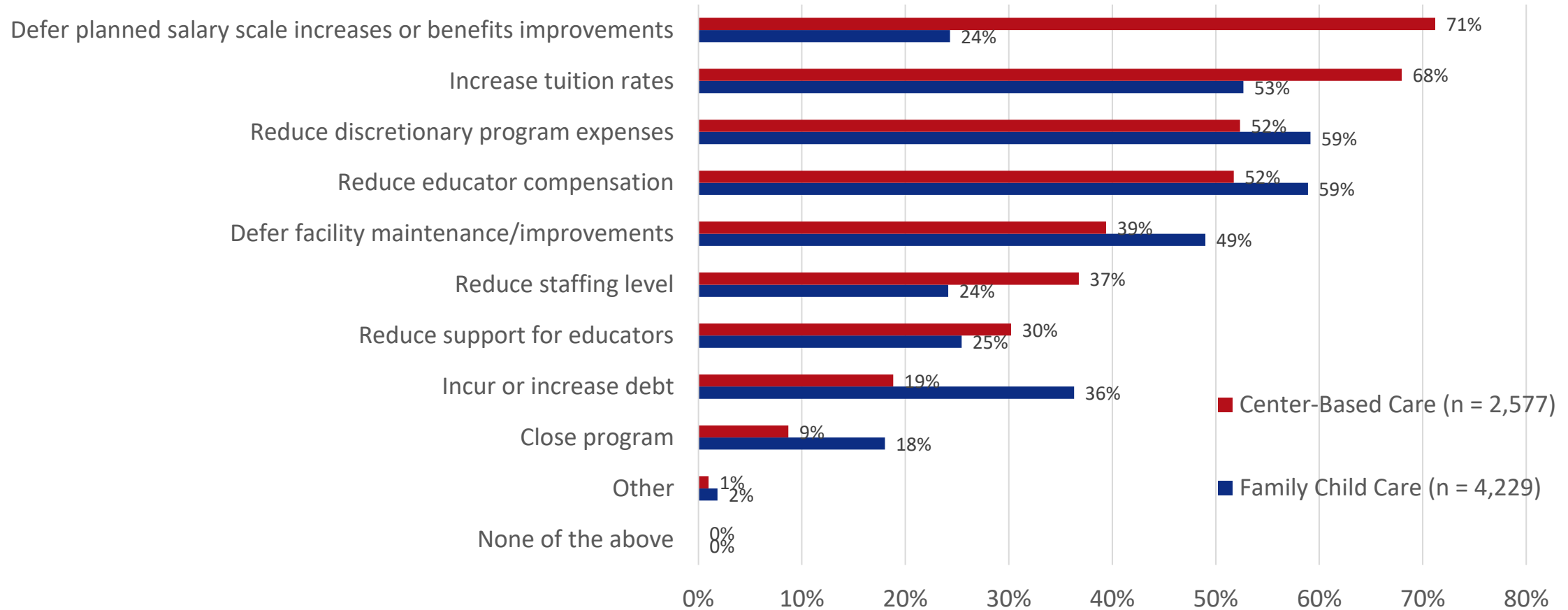
The flexibility of C3 funding allows different program types to spend funds based on their needs.

Grant Funds Expended by Program Type through Spring 2023



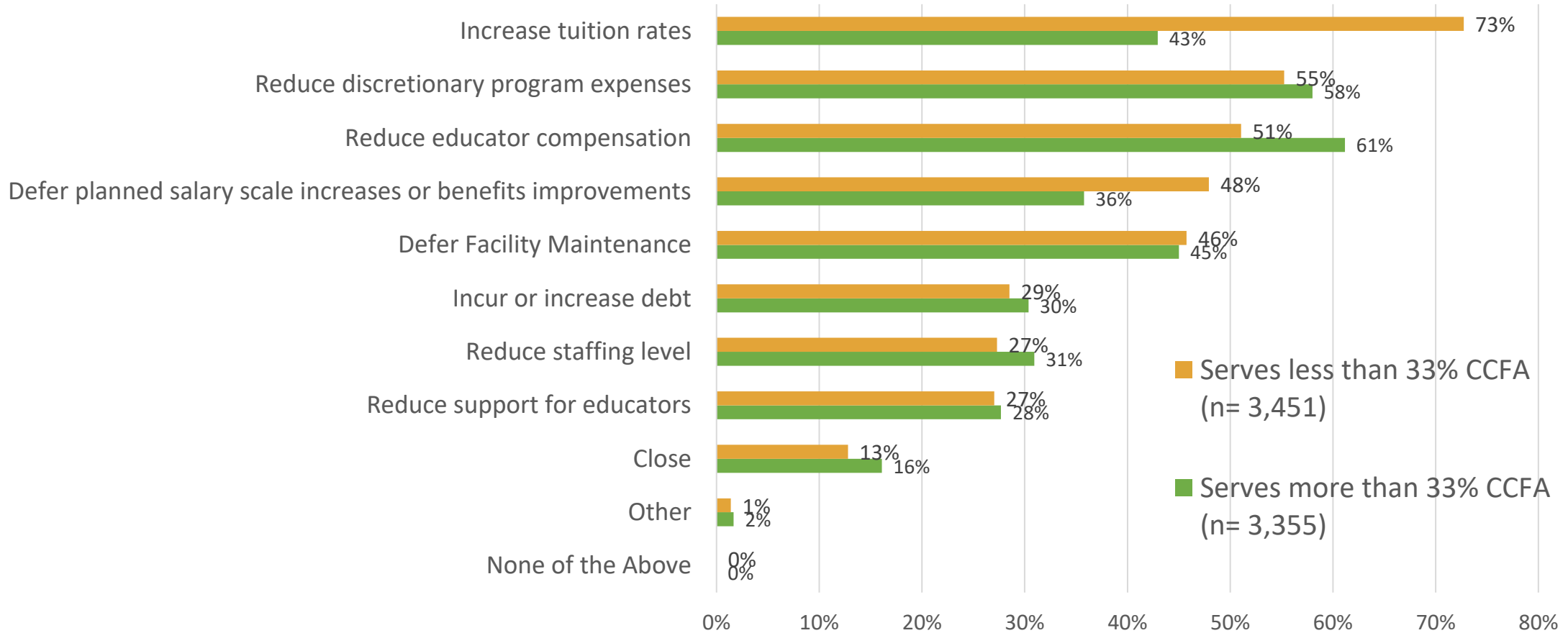
C3 funds have supported providers in raising salaries, making investments (including avoiding debt), and avoiding significant tuition increases.

Changes Programs Report if C3 Ends, by Provider Type

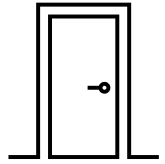


The changes programs would make if C3 were no longer available vary by the proportion of children that receive child care financial assistance.

Changes Programs Report if C3 Not Available, by Proportion of Children Receiving CCFA

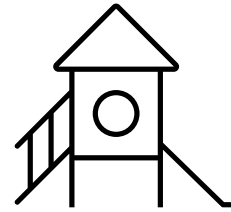


Programs increasingly report needing to close if C3 funds were no longer available.



982

programs report they would
**Close if C3 Funds No
Longer Available**



18% of family child care
report they would close
up from 14% in Fall 22

8% of center-based programs
report they would close
down from 9% in Fall 22



~6,500

**Child Care Financial
Assistance Seats**

would be lost if these programs closed



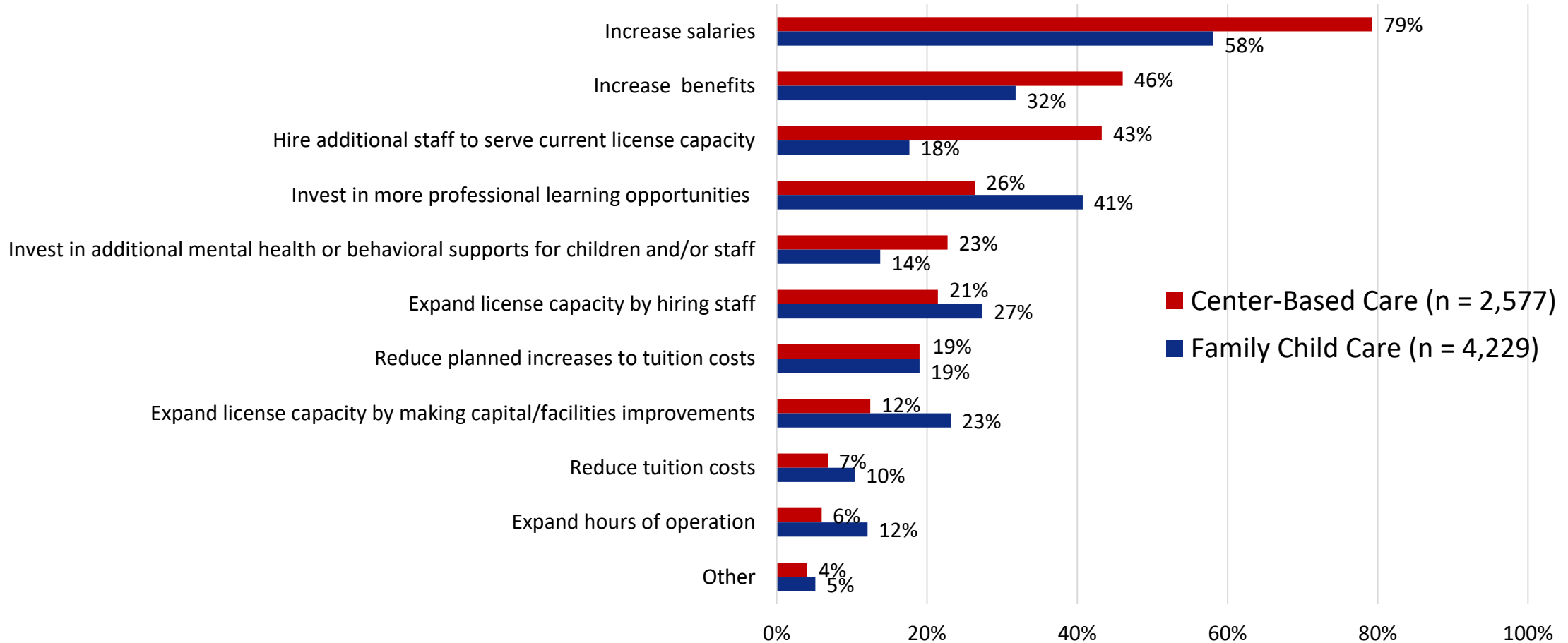
18,000

Licensed Seats

would be lost if these programs
closed

If C3 became a permanent funding source, programs would prioritize increasing salaries and benefits, hiring additional staff, and investing in professional learning and additional supports for children.

Activities programs would prioritize if grant funding permanent



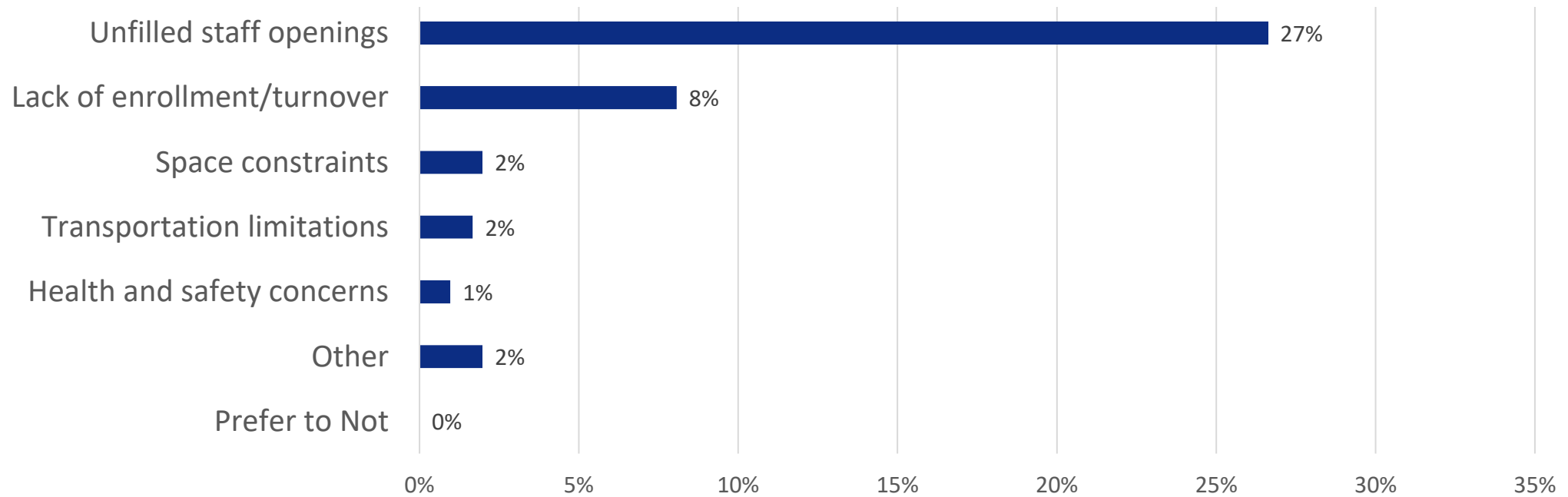


C3 Spring 2023 Survey Findings: Capacity, Staffing, and Compensation

Overall, about 1/3 of center-based providers report being unable to serve their full license capacity.

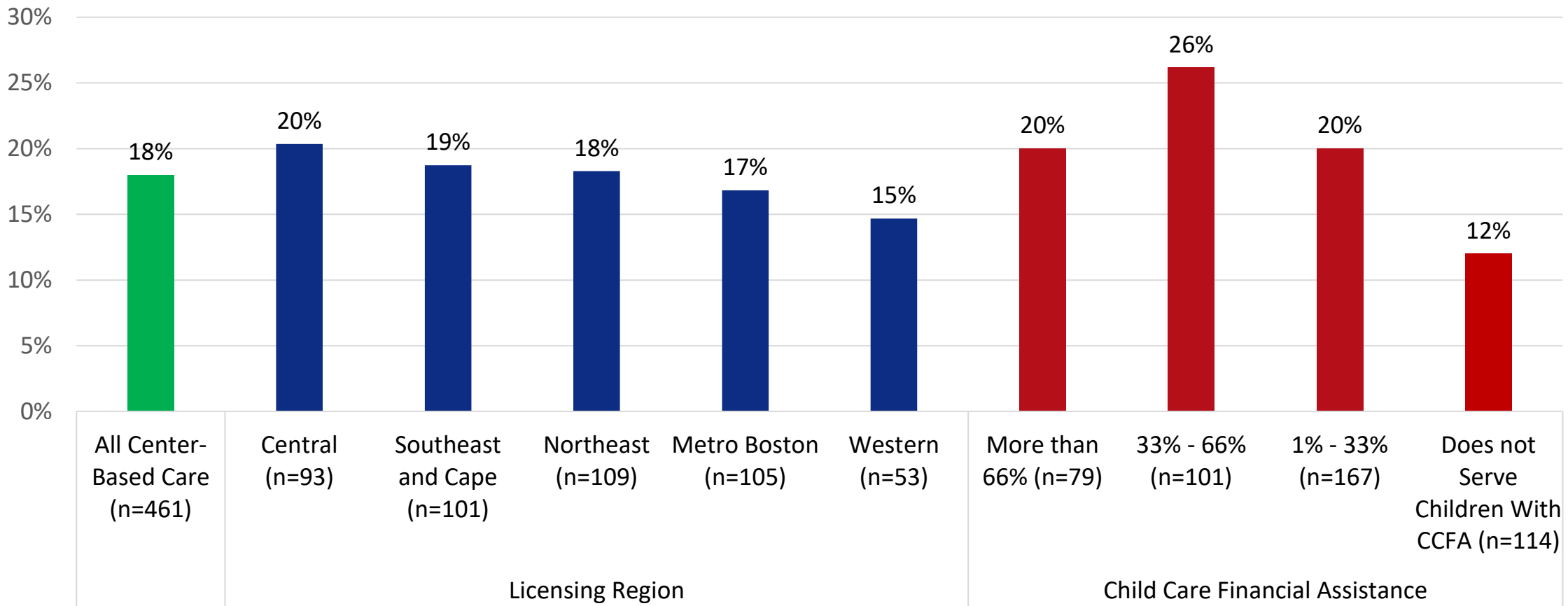
Report Unable to Serve Full Capacity 32%

The most commonly reported reasons that programs are unable to serve their full license capacity include...



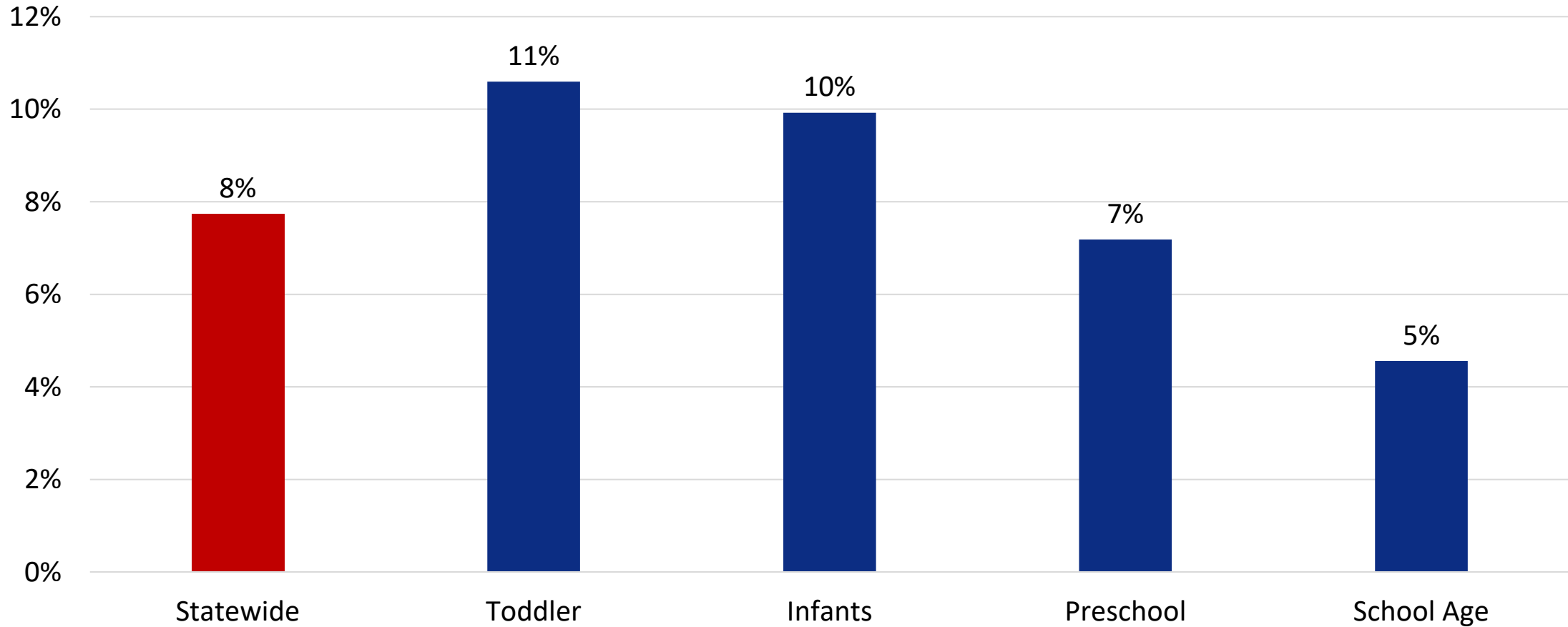
Almost 1/5 of center-based programs statewide report at least one closed classroom.

Percentage of programs with closed classrooms



Infant and toddler classrooms are the most affected by classroom closures.

Percentage of Closed Classrooms by Age Group



About 11% of all educator positions statewide are open.

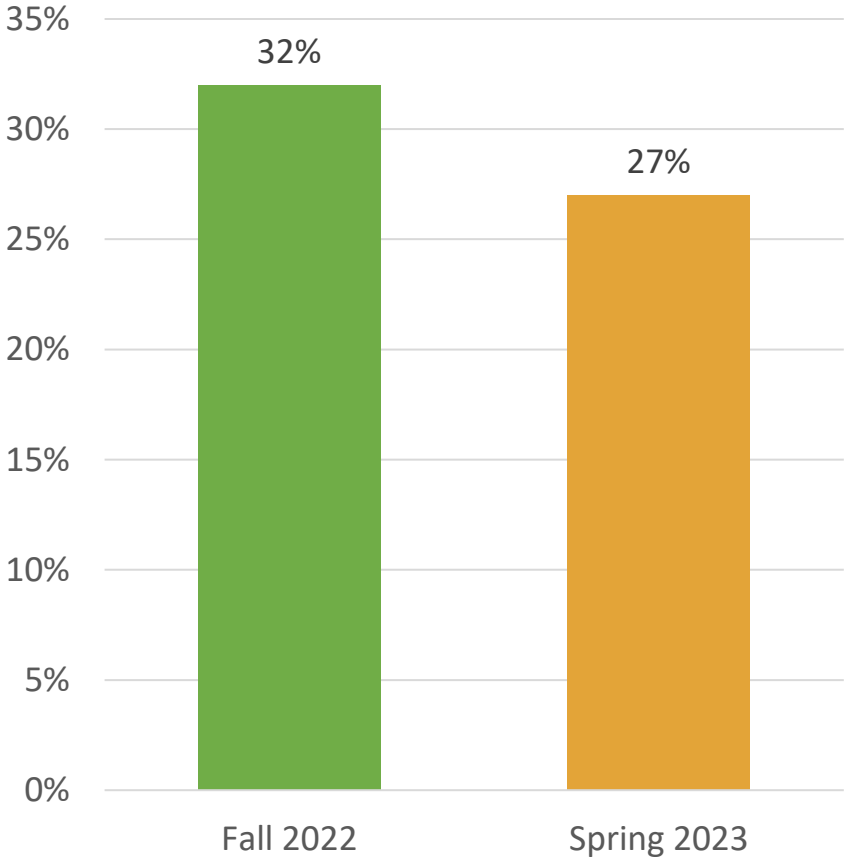
Programs report 2,045 open teacher positions, which make up 50% of all open positions and about 11% of all teacher positions statewide.

46% of all center-based programs report an open position, averaging 3.4 open positions per programs.

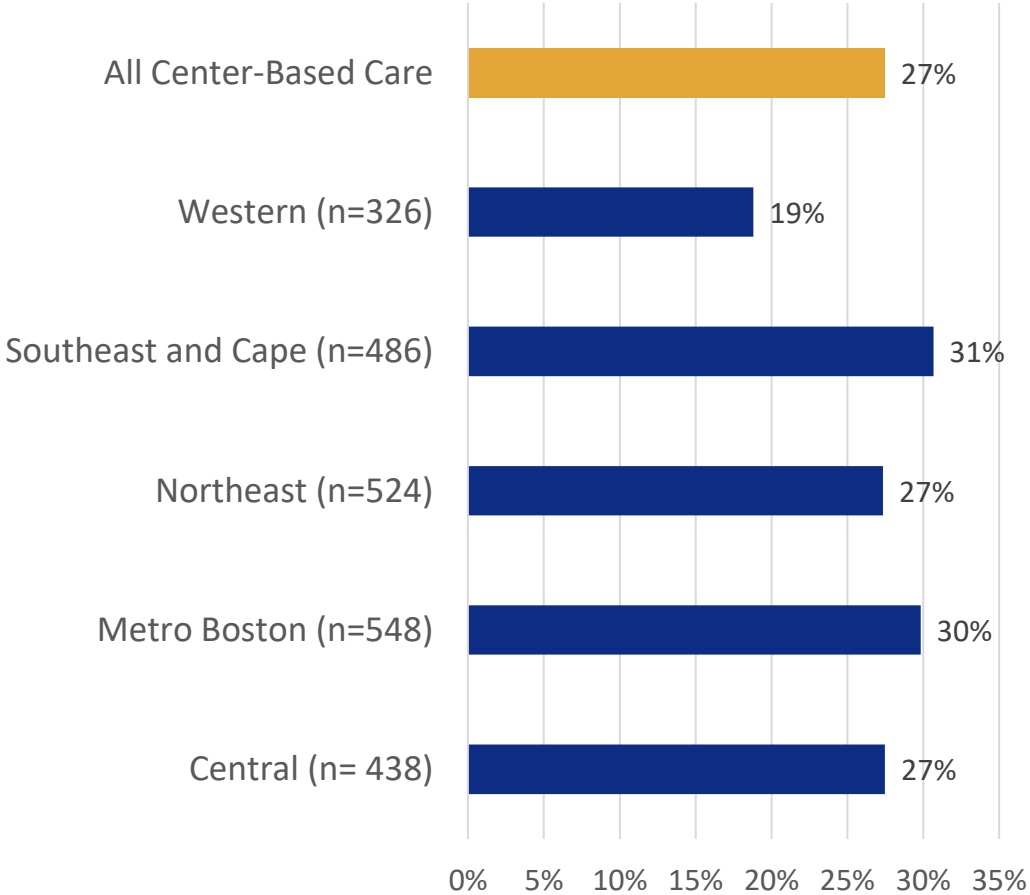
Role	Number of Open Positions Statewide	Percent of All Open Positions Statewide	Number of Positions Statewide	Percent of All Positions that are Currently Open
Teacher	2,045	50%	19,389	11%
Assistant Teacher	1,249	31%	8,684	14%
Group Leader	406	10%	3,436	12%
Assistant Leader	213	5%	1,696	13%
Site Coordinator	60	1%	1,008	6%
Center Director	53	1%	2,294	2%
Program Administrator	46	1%	1,301	4%
All positions	4,072	100%	37,808	11%

The educator turnover rate is decreasing, although it is still high.

Turnover Rate Over Time

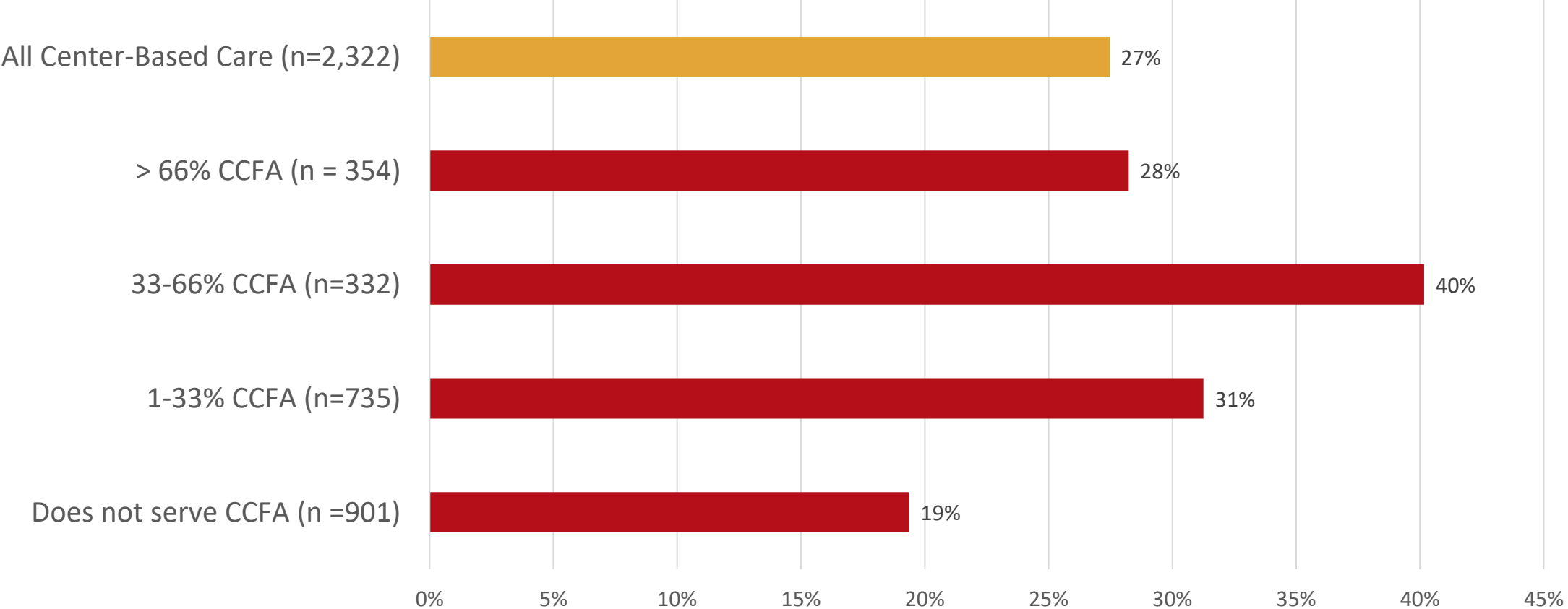


Turnover Rates by Region

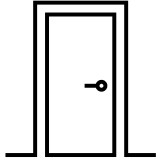


Turnover rates vary based on the proportion of children receiving child care financial assistance that a program serves.

Turnover Rates By Proportion of Children Receiving CCFA



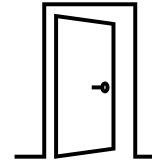
Staffing challenges prevent programs from serving their full license capacity.



1/3

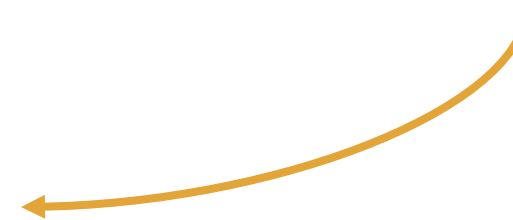
Of all group and school age programs

Cannot serve their full license capacity



79% of those GSA programs

Cite unfilled staff openings as a cause

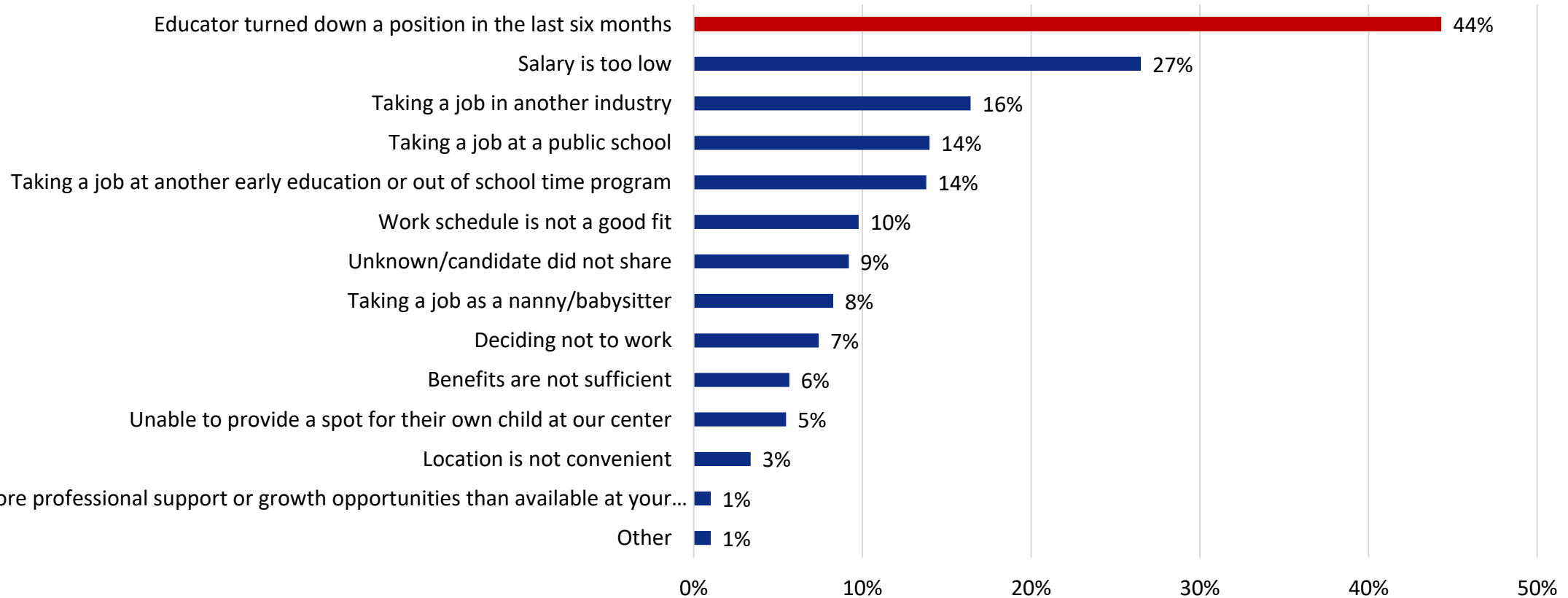


10,000-16,000

additional **children** could be served
if these positions were filled

Overall, 44% of center-based programs reported having at least one educator turn down a role in their program in the last 6 months.

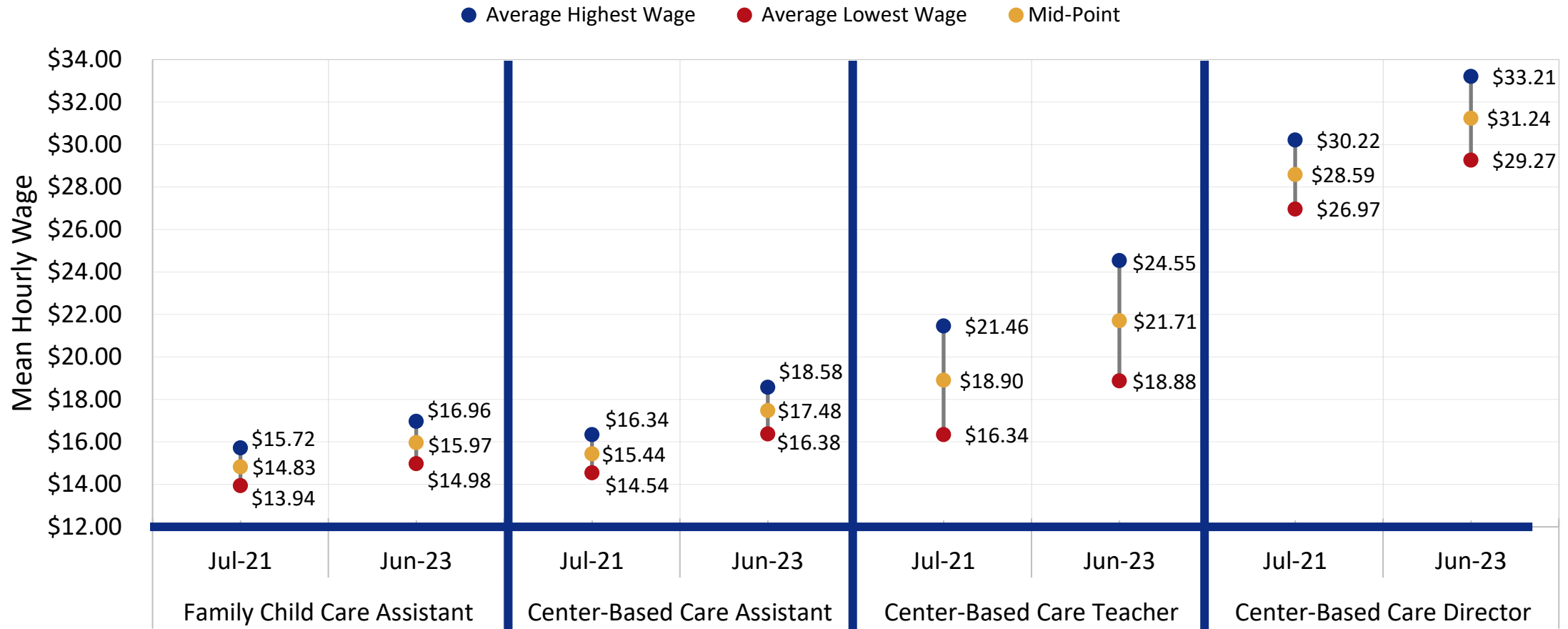
The most frequently reported reasons include:



Note: Providers were able to select more than one option

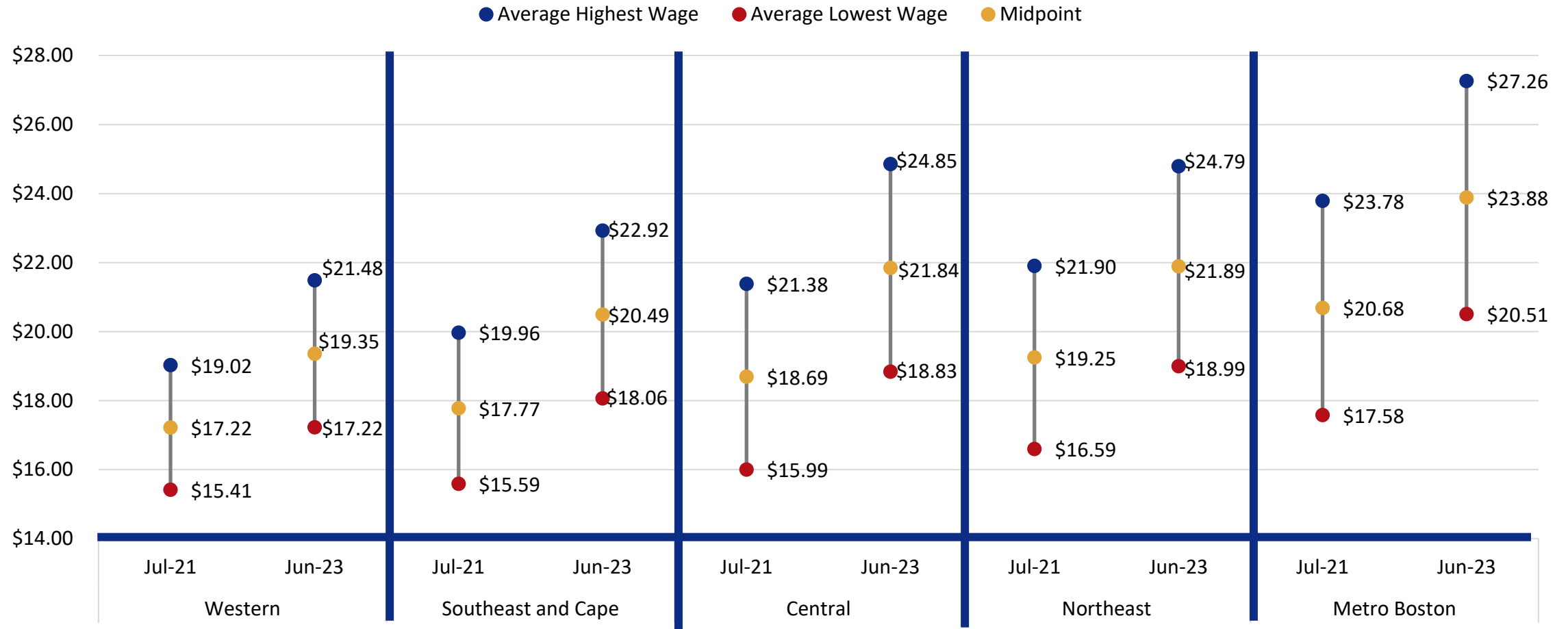
Wages have increased since the beginning of C3 but remain low.

Average Educator Highest and Lowest Hourly Pay By Role Over Time



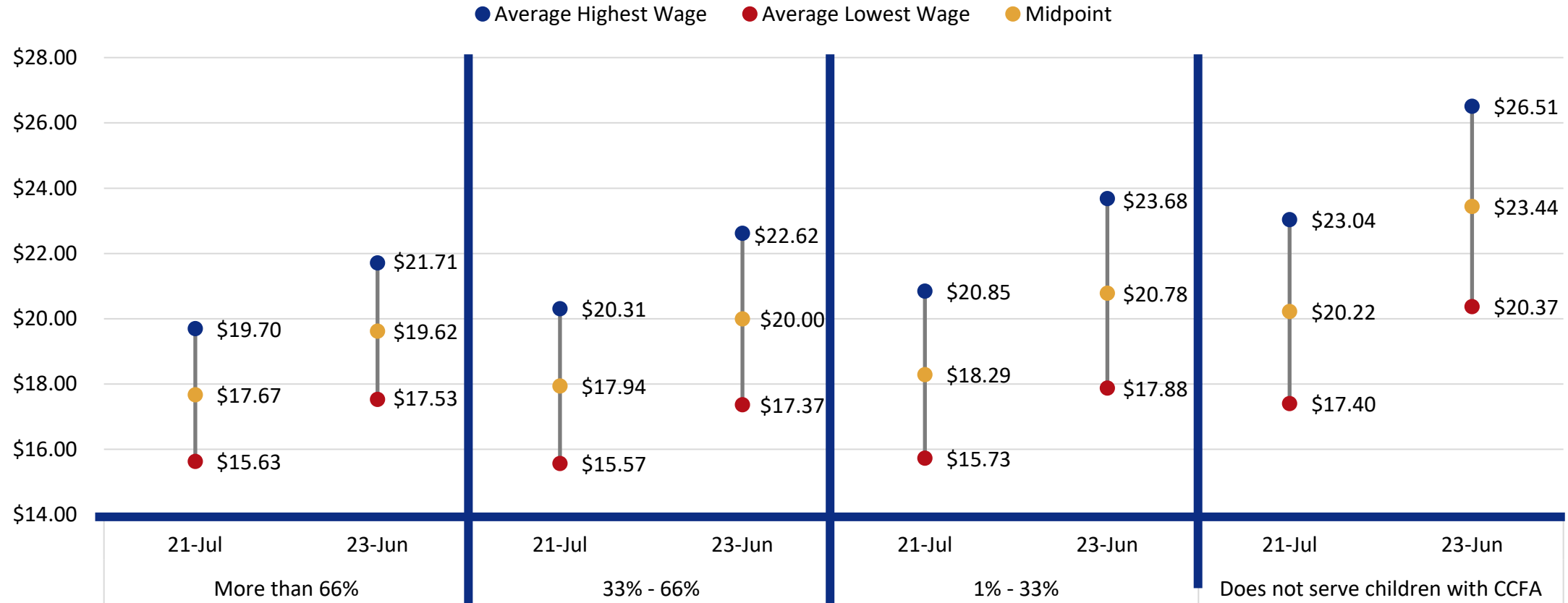
Educator hourly pay varies by region.


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



Educator hourly pay also varies by the proportion of children that receive child care financial assistance.

Teacher's Average Highest and Lowest Hourly Salary By CCFA Acceptance Over Time

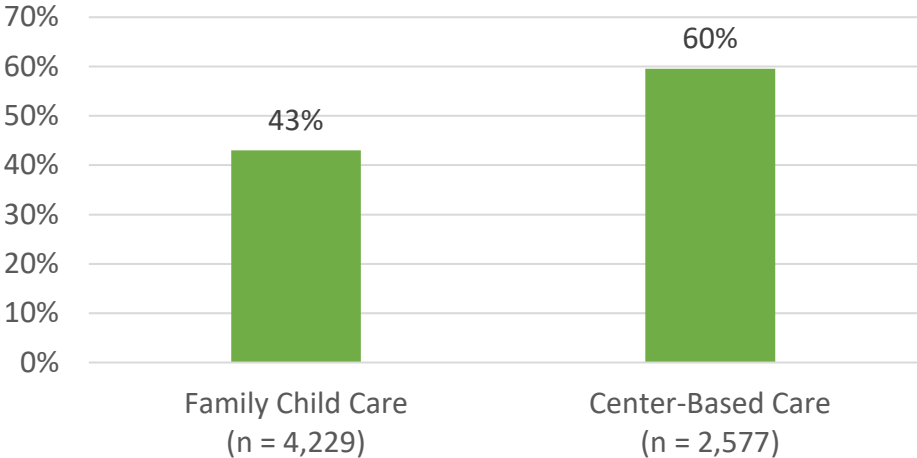




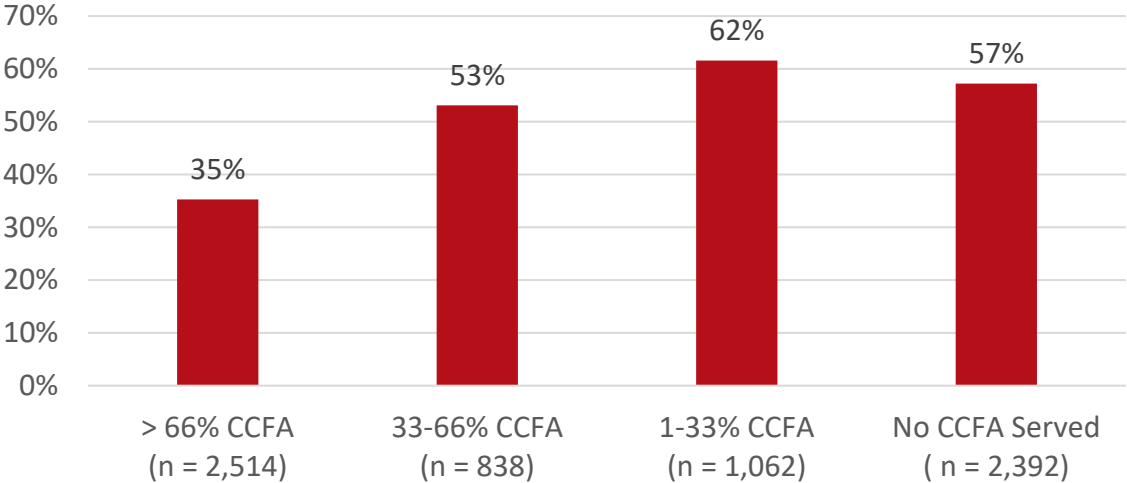
C3 Spring 2023 Survey Findings: Family Access and Enrollment

Nearly half of programs have their own waitlist for enrollment.

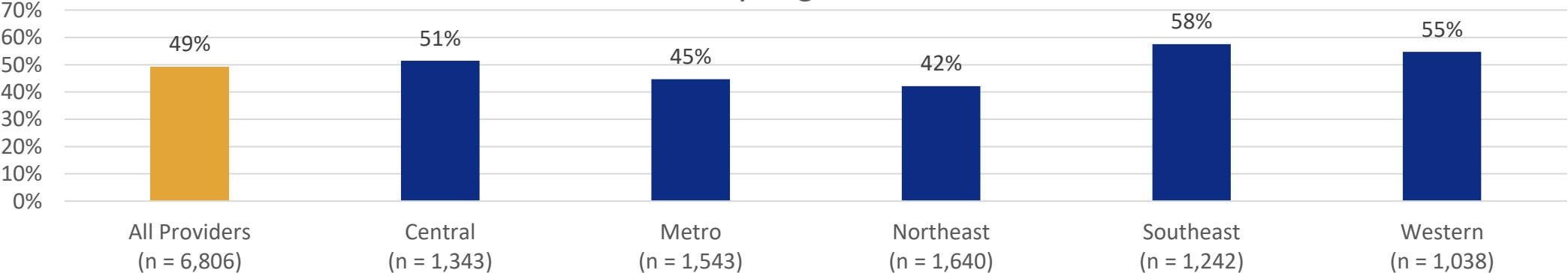
By Program Type



By CCFA Served



By Region



Almost $\frac{3}{4}$ of programs report that C3 has positively impacted affordability for families.

