



CHILDCARE IN WISCONSIN AND ITS IMPACT ON WORKFORCE AND THE ECONOMY

FOR THE WISCONSIN ECONOMIC DEVELOPMENT INSTITUTE
OCTOBER 2022 | FEBRUARY 2023



Methodology

The goal of the project was to gather in one location the research and data that has been produced on the issue of childcare and its affect on the workforce and economy of Wisconsin in recent years. Then, utilize the full and varied body of evidence to produce a data-backed overview of the childcare issue in Wisconsin.

This report was prepared by gathering and subsequently analyzing all relevant recent research and surveys on childcare and its impact on the workforce and economy of Wisconsin. Both statewide and locally gathered data were utilized. Alongside data collection, informational interviews of important stakeholders were completed to determine if the correct research was being gathered and to generate new contacts and leads on data sources. No new research was conducted by this report.

Approximately 30 data sources were gathered and utilized for this report. These are surveys, studies, reports, and assessments conducted by various governments, not-for-profit organizations, business groups, and other reputable stakeholders. This data spans the past twenty years, but most is from the past few years.

Approximately twelve informational interviews were held with childcare resource and referral agencies, business leaders, childcare advocates, and government employees. The goal was to verify their data was being understood correctly and to generate new leads and contacts for additional data provision.

Data collection on this project spans October 2022 to February 2023.

About WEDI

WEDI MISSION STATEMENT

The Wisconsin Economic Development Institute, Inc. (WEDI) is a non-profit, non-partisan foundation established under the Wisconsin Economic Development Association (WEDA) to conduct research and education designed to increase the effectiveness of economic development efforts.

WEDI VISION

A higher quality of life and increased access to wealth and opportunity for Wisconsin citizens through economic development.

WEDI GOALS

- Provide policymakers, organizations and the general public with critical information to help address and improve economic conditions.
 - Provide policy research material, industry publications, and educational services, training and programming to promote economic development.
 - Identify and offer ideas and resources to address gaps in economic growth and prosperity.
 - Offer stakeholders and the general public with a clearinghouse of economic development information.
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WEDI VALUES

- Supportive of increased economic growth and equal access to wealth.
- Supportive of thoughtful and effective long-term economic growth policy making to promote economic prosperity.
- Maintain independence and objectivity in the pursuit of economic expansion throughout Wisconsin.

Executive Summary

Wisconsin businesses and employers perceive that a lack of affordable childcare in the state is negatively impacting the state economy and their businesses.

- Approximately 4 out of 5 Wisconsin employers say the state economy is impacted by parent's access to affordable, high-quality childcare.
- Two-thirds of employers say childcare is a way to retain valuable employees.¹
- The long-term economic impact of Wisconsin's childcare crisis is estimated at \$4.2 to \$6.4 billion.²
- This data also appears in county-level surveys. In a November 2020 survey, 68% of Door County residents rated childcare as a top three most important issue to the County's future, in second place was housing with 49%, an almost twenty percentage point gap in the issues.³

Childcare is expensive, and the true cost of providing safe and quality childcare is often above what working families can afford to pay. Put simply, in most of the state, the market rate is much lower than provider's true cost of care.

- The average Wisconsin family with one infant is spending 1/5 of their annual income on childcare.¹
- Typical family with an infant and 4-year-old are spending 1/3 of their annual income on childcare.¹
- As of 2019 in La Crosse County, nearly 1 in 5 families reported childcare expenses at or greater than 25% of total family income. Most families paid between \$500 and \$1000 for childcare monthly. However, over 27% paid \$1,000 or more per month for childcare expenses. According to US Census data, between 2017-2021, post-tax monthly take home pay for a household of 4 in La Crosse County was \$3,833 a month.⁴

Childcare providers must balance their operating budgets. They cannot charge more for their services than working families can afford to pay. They also cannot cut overhead costs such as food, utilities, and facility rent. The only option to balance their budget is to cut staffing costs, resulting in lower pay and fewer benefits for staff.

- A 2022 childcare market survey by the Wisconsin Department of Children and Families found that on average Center Directors are paid 40% less than recommended, Lead Teachers are paid 48% less than recommended, and Teacher Assistants are paid 35% less than recommended.⁵

¹ Raising Wisconsin

² Bipartisan Policy Center

³ Door County Survey Summary (UW of Door County)

⁴ La Crosse County Childcare Survey (UW Madison)

⁵ 2022 Childcare Market Survey Results (DCF)

Facing an already tight labor market, childcare providers are struggling to hire workers. Childcare employees are often highly educated and there are many job options outside of the childcare industry that offer higher pay and better benefits.

- More than 80% of Wisconsin's early childhood educators have some form of higher education. They also:¹
 - o Earn an average of \$11 to \$13 an hour,
 - o Rarely access standard benefits,
 - o And 26% of center providers and 34% of family providers receive at least one form of public assistance.
- In 2022, in the 10-county West Central Wisconsin area, among 81 regulated childcare centers there were 324 open staff positions, despite the centers hiring 590 staff members in the past 12 months.⁶
- In 2022, in the 14-county North Wisconsin area, 77% of providers reported higher rates of staff turnover or staff shortages due to the pandemic, in total there were 104 open staff positions. These same providers hired 224 staff in the past 12 months.⁷

The lack of childcare workers is forcing regulated childcare providers to close classrooms and cut their hours of service. This reduces actual childcare capacity in the state and creates a gap between actual capacity and the licensed limit.

- In the same 10-county West Central Wisconsin area mentioned above, the lack of staff resulted in:⁶
 - o A licensed capacity of 6,606 being decreased to an adjusted capacity of 4,941,
 - o 90% of centers have a wait list with a total of 4,304 children on the wait list,
 - o Without support around the childcare staffing crisis, 16% of group childcare programs reported they were facing closure due to the ongoing issue of not having qualified staff,
 - o And without ongoing financial support (through programs such as Child Care Counts, Partner Up!, etc.) 44% of programs were unsure they would remain in business and 21% felt they would close.
- In the same 14-county North Wisconsin area mentioned above this lack of staff resulted in:⁷
 - o 19 classrooms being closed due to a lack of staff, which represents 334 unutilized childcare slots, and a 15% total reduction in capacity,
 - o 77% of providers have a wait list with a total of 637 children on the wait list,
 - o And 18% of providers are facing closure due to a lack of staffing, and 43% of providers are either likely or extremely likely to close within one year.

Worst-case scenario, a lack of staff will cause childcare providers to close their doors. Statewide there has been a 26% decrease in the number of regulated childcare facilities. Programs either consolidate or close.⁸

- In rural Northern Wisconsin, the 14-county area has gone from 283 regulated programs in 2016 to 184 in 2022, a 34% reduction in just six years.⁶

⁶ West Central Capacity Data (Child Care Partnership)

⁷ Northern WI Capacity Survey 2022 (Northwest Connection Family Resources)

⁸ Capacity Data Statewide and South-Central Region (4-C)

- In Central Wisconsin, the 10-county area has gone from 691 providers in 2010 to 276 providers in 2022, a 60% reduction in 12 years.⁶
- Even in the densely populated South Central Wisconsin area surrounding Madison, the number of regulated childcare facilities has decreased by 31% since 2013.⁸

Despite these closures, there has been a net increase in childcare capacity statewide. In the past decade licensed capacity has increased by 13% across the state. However, this statewide data is skewed by densely populated areas of the state. As mentioned above, actual capacity of providers is often lower than licensed capacity due to staffing challenges.⁸

- For example, in the eleven-county South Central Wisconsin area surrounding Madison, overall capacity increased 9% from 2013 to 2022. However, much of that overall increase was attributed to increasing capacity in Dane, Dodge, and Iowa counties. Capacity in Columbia, Grant, Green, Jefferson, Lafayette, Rock, Sauk, and Walworth counties decreased on average by about 8%.⁸
- This is despite all counties mentioned having an increase in population in the same period.⁹

Rural communities are being particularly impacted by childcare staffing shortages and facility closures. Even in moderately populated counties, the rural areas of the county are experiencing disproportionate impacts compared to their population centers. Greater commuting distances in rural areas put additional strain on working families. La Crosse County provides an excellent case study.

- In a March 2022 survey, 19% of regulated childcare centers in La Crosse County are facing closure due to a lack of staffing, this represents 372 childcare slots. All of these centers are in rural areas of the county, none are in the City of La Crosse¹⁰
- In the same survey, 5 classrooms were closed by existing childcare centers due to a lack of staff, all of which are located outside the City of La Crosse¹⁰
- The effect is that 60% of parents reported that a lack of providers close to their residence is the main issue affecting their childcare search, while only 12% said the main issue was cost of care.⁴
- Unfortunately, La Crosse's case isn't unique. Statewide, childcare deserts exist in 70% of Wisconsin's rural areas.¹

This lack of staff and resulting reduction in childcare capacity means that working families' childcare needs are going unmet. The reasons are diverse and based upon the community in question; but across the state families report childcare being too expensive and their needed times of care being in limited supply or not available.

- In a 5-county survey covering Winnebago, Fond du Lac, Outagamie, Dodge, and Calumet counties, parents consistently identified their top 3 reasons for gaps in their childcare service being:¹¹

⁹ 2020 Census Data

¹⁰ La Crosse County Childcare Capacity (The Parenting Place)

¹¹ UW Oshkosh Childcare Surveys: Winnebago, Fond du Lac, Outagamie, Dodge, and Calumet counties

- cost of childcare services,
- services not being offered by their current provider at the needed days and times,
- and limited availability of other providers offering needed services at these days and times.
- 52% of parents in Dodge and Jefferson County had a difficult time finding childcare in their area¹²
- In Door County, this issue is more nuanced. Over 70% of parents are happy with their current childcare arrangement and 84% report the location of their childcare provider being convenient for them, however:³
 - 52% have trouble affording this childcare,
 - 46% have concerns about having to use too many different caregivers in a week,
 - And 45% have trouble finding childcare that meets the hours they need.

Employees report that these issues with childcare are affecting their ability to work. Impacts include being late to work, unable to focus or be as productive while at work, and even keeping otherwise healthy able to work parents out of the workforce.

- In Dodge and Jefferson Counties, 74% of parents have missed work due to lack of childcare; 48% were late and 51% reported being unable to focus at work due to lack of childcare. 46% declined overtime hours because of lack of childcare.¹²
- In Manitowoc County, 46% of residents indicate childcare issues have significant impact on their ability to fully participate in the workforce. As many as 58% of respondents who were not working but physically able to, said that childcare issues were a primary barrier to re-entering the workforce.¹³
- In La Crosse County, 38% of employees indicated childcare issues affect their work productivity.⁴

From the business perspective, businesses are reporting the childcare crisis is affecting their ability to recruit and retain employees.

- 73% of Eau Claire and Chippewa County employers said in a 2022 survey that their employees had requested flexible work hours because of childcare issues, 64% reported that employees had been absent from work due to childcare issues, 54% of employers reported that employees had been late to work due to childcare issues, and 46% reported that their employees were under stress about childcare arrangements and have been unable to work to their full capacity.¹⁴
- In a survey of Rock County employers, nearly 50% of respondents rated the importance of childcare as Important-to-Very Important for their employee recruitment and retention efforts; less than 20% noted it was effectively a non-issue. The remaining 30% took a stance of neutrality as it concerned the relative importance that childcare plays in the job market – specifically as it concerned their organization’s staffing profile.¹⁵

¹² Dodge & Jefferson Survey Exec Summary (Greater Watertown Community Health Foundation)

¹³ Manitowoc County Childcare Study (Progress Lakeshore)

¹⁴ Eau Claire and Chippewa Survey (Child Care Task Force in Eau Claire/Chippewa Counties)

¹⁵ Rock County Employer Survey (Rock County Economic Development)

- More concerning, 21.6% of employers in Chippewa and Eau Claire counties report their employees terminating their employment due to a lack of childcare.¹⁴

Statewide, businesses recognize that childcare is affecting their business and the overall business success in the state. Importantly, they also report the problem has gotten worse during and since the pandemic.

- Wisconsin employers report that their top reasons for exploring child and family supporting benefits are:¹⁶
 - o 64% It's a way to retain valuable employees,
 - o 54% My employees are more productive when their children's needs are met,
 - o 38% It's less disruptive to the company because employees aren't working inconsistent hours or leaving,
 - o And 34% It's a way to attract quality talent to my organization.
- 58% of Wisconsin employers also said that COVID-19 had decreased their employee's access to quality childcare, which contributed to employees reducing their hours, difficulty in hiring new employees, and employees using more paid and unpaid leave.¹⁶
- Employers rated their perceived benefits of supporting their employee's childcare and parenting. The top-of-the-mind benefits are:¹⁷
 - o 45% increasing employee attendance and reducing work outages,
 - o 25% increasing employee morale and reducing employee stress,
 - o 22% increasing productivity,
 - o And 11% attracting and retaining talent.

¹⁶ WI Employer Research Snapshot (Department of Children and Families)

¹⁷ WI Employer Perception Comprehensive Report (DCF)

Statewide Data

Data from Raising Wisconsin (Various Sources)

- Link to source: [Employers & Economic Leaders | Raising Wisconsin](#)
- Approximately 4 out of 5 Wisconsin employers say the state economy is impacted by parent's access to affordable, high-quality childcare
- 2/3 say childcare is a way to retain valuable employees
- Wisconsin has a higher rate of working mothers of infants and toddlers (68%) than the national average (62%)
- The long-term economic impact of Wisconsin's childcare crisis is estimated at \$4.2 to \$6.4 billion (Bipartisan Policy Center)
- Wisconsin family with one infant is spending 1/5 of their annual income on childcare
- Typical family with an infant and 4-year-old are spending 1/3 of their annual income on childcare
- Childcare "deserts" exist across more than 50% of the state and 70% in Wisconsin's rural areas
- There are more than three children under age 5 for every licensed child care slot. (EPI and CAP)
- More than 80% of Wisconsin's early childhood educators have some form of higher education
 - o Earn an average of \$11 to \$13 an hour
 - o Rarely access standard benefits
 - o 26% of center providers and 34% of family providers receive at least one form of public assistance
 - o There is a 40% turnover rate for providers

WI Employer Research Snapshot (Department of Children and Families)

- Source: *WI Employer Research Snapshot (DCF)*
- What did Wisconsin employers select as the top reasons to explore child and family-supporting benefits?
 - o 64% It's a way to retain valuable employees
 - o 54% My employees are more productive when their children's needs are met
 - o 38% It's less disruptive to the company because employees aren't working inconsistent hours or leaving
 - o 34% It's a way to attract quality talent to my organization

Survey respondents were asked to rate their level of agreement with the following statements.

It's important for Wisconsin businesses to support child care for their employees.



Providing employees with resources to support their child care needs is a strategy that all employers should consider to address workforce/labor shortages.



Wisconsin's economy is impacted by families' abilities to access affordable, high-quality child care.

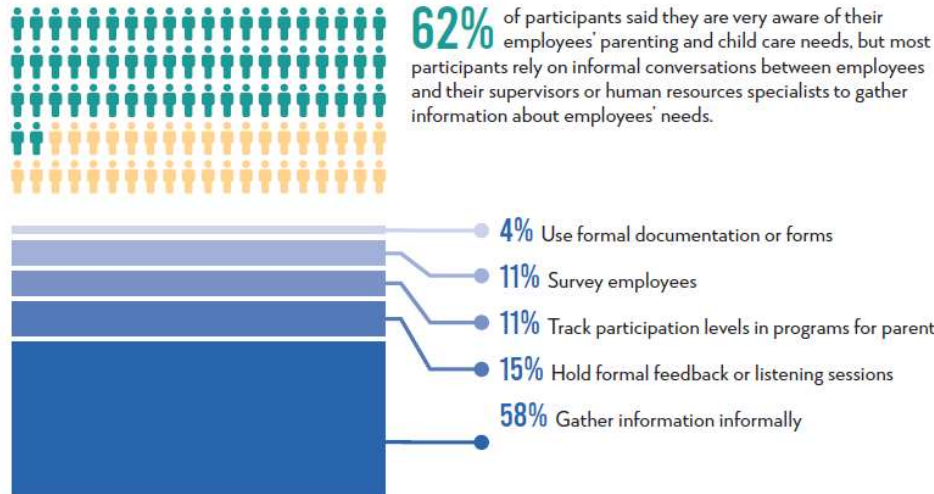


Without access to affordable early child care, Wisconsin businesses will face workforce/labor shortages now and in the future.



58% of participants said that COVID-19 had decreased their employees' access to quality child care. They reported employees' lack of access to child care over the last 12 months contributed to:

- Employees changing or reducing hours: **45%**
- Difficulty hiring new employees: **43%**
- Employees taking more paid leave: **43%**
- Employees taking more unpaid leave: **42%**
- Employees leaving the workforce (temporarily or permanently): **34%**
- Employees working remotely: **31%**
- Lost revenue due to staffing shortages: **20%**
- Employees changing roles for greater flexibility: **19%**
- Reduced hours or business closures due to staffing shortages: **15%**
- Other impacts (primarily reduced productivity or bringing a child/children to work): **4%**



This matters, because employers who use formal methods were **7%** more likely to say they're very aware of their employees' parenting and child care needs than those using informal methods. Several surveys are underway across Wisconsin to look at local data around employee needs for child care. Project Growth also offers a sample Survey on Employee Needs for Child Care that can be customized and employers, available at ProjectGrowth.WI.gov

WI Employer Perception Comprehensive Report (Department of Children and Families)

- Source: *WI Employer Perception Comprehensive Report (DCF)*
- The majority of participants said they are very aware of their employees' parenting and childcare needs (62%). Another 35% said they are somewhat aware, and 3% said they are not aware.

When grouped into categories from greatest to least disruption of the business, most participants experienced disruption to employees' schedules or roles rather than larger disruptions to their business:

Disruption to Business Financials or Operating Hours	Unable to Retain Employees	Unable to Attract Employees	Disruption to Employees' Schedules or Roles
26% (255)	34% (332)	42% (419)	70% (684)

- There were no significant impact differences between regions.
- Slightly fewer than half (47%) of respondents agreed or completely agreed that the pandemic has changed how their organization approaches employees' parenting and childcare needs. An additional third (34%) were neutral and 19% disagreed
- A little over half of participants (54%) agreed or completely agreed that their organization adequately supports employees with their childcare and parenting needs at present
- About the same number (54%) also agreed or completely agreed that the success of their organization is directly impacted by their employees' access to childcare.
 - o 28% were neutral and the remaining 18% disagreed.
- Those who had faced a severe business impact of lost revenue or business closures in the past year were significantly more likely (74%) to agree that the success of their business is tied to employees' access to childcare.

- However, fewer participants expressed willingness to increase their organization's investment in childcare needs, with only 38% agreeing or completely agreeing.
 - o A larger percentage (43%) were neutral and 19% disagreed.
- When separated from statements about their individual business, participants were much more likely to agree to broader statements about the role of ECE in Wisconsin's economy and as a strategy for addressing workforce shortages:
 - o It is important for Wisconsin businesses to support childcare for their employees.
 - Agree: 71%
 - Neutral: 21%
 - Disagree: 8%
 - o Providing employees with resources to support their childcare needs is a strategy that all employers should consider to address workforce/labor shortages.
 - Agree: 73%
 - Neutral: 18%
 - Disagree: 9%
 - o Wisconsin's economy is impacted by families' abilities to access affordable, high-quality childcare.
 - Agree: 80%
 - Neutral: 13%
 - Disagree: 7%
 - o Without access to affordable early childcare, Wisconsin businesses will face workforce/labor shortages now and in the future.
 - Agree: 83%
 - Neutral: 12%
 - Disagree: 5%
- **Business owners** were significantly less likely to agree that access to ECE is vital to Wisconsin's economy and workforce than those who identified as **employees**:
 - o It's important for Wisconsin businesses to support childcare for their employees:
 - **Business owners:** 64% (significantly lower)
 - **Employees:** 86% (significantly higher)
 - o Providing employees with resources to support their childcare needs is a strategy that all employers should consider to address workforce/labor shortages:
 - **Business owners:** 65% (significantly lower)
 - **Employees:** 84% (significantly higher)
 - o Wisconsin's economy is impacted by families' abilities to access affordable, high-quality childcare:
 - **Business owners:** 78% (significantly lower)
 - **Employees:** 89% (directionally higher)
 - o Without access to affordable early childcare, Wisconsin businesses will face workforce/labor shortages now and in the future:
 - **Business owners:** 73% (significantly lower)
 - **Employees:** 86% (directionally higher)

Perceived Benefits of Supporting Employees' Child Care and Parenting Needs

- Primary top-of-mind benefits included:

INCREASING EMPLOYEE ATTENDANCE/REDUCING OUTAGES: 45%

"They have excellent attendance and rarely need a day off due to child care. Also, work performance is better when they can focus on their tasks at work."

"They are able to work more hours and not leave early, or have to start later. We have our employees work from 7:45am-3:30pm M-F. It has affected our decision to hire some employees because they cannot arrange for child care."

"They have better attendance and can focus on their roles in our organization with less anxiety and worry about the care being given their children."

INCREASING EMPLOYEE MORALE AND REDUCING EMPLOYEE STRESS: 25%

"More dependable, productive and happier employees. Employees have less worry throughout the day regarding their child's care and feel better they are working to enable them to actually take home wages to sustain themselves and their families."

"Staff come into work happier and willing to work because they know child is safe."

"Happier employees, less stress."

INCREASING PRODUCTIVITY: 22%

"We see more productivity, less staff shortages, and higher morale."

"Less stress. More productive and more willing to work additional time."

"The employee is able to focus on their work and not worry about how they are going to pick up their child. They will be able to stay overtime if a project requires it."

ATTRACTING AND RETAINING TALENT: 11%

"Happier employees, longer employee retention, employees gain long-term employment, steady employment, and become better skilled at their jobs and enables advancement to higher paid positions."

"I believe it might allow us to attract more candidates that have younger children, and are unable to work the hours we need due to child care needs not being available."

"It makes it easier to retain staff, especially young staff having babies."

Perceived Barriers to Supporting Employees' Child Care and Parenting Needs

- Primary top-of-mind barriers included:

LACK OF FUNDING: 49%

"I am a small business and by the end of the year there isn't much left over so to add one more thing may be too much."

"As a government entity, our ability to grow revenue is extremely limited and our existing, ongoing financial resources are very limited."

"We currently operate an on-site child care center. It operates at a significant loss each year. It is hard to expand a business unit which consistently loses money."

LACK OF STAFF: 8%

"Lack of child care workers."

"Flexible scheduling requires additional employees to fill the hours vacated by employees with unexpected child care needs. It's incredibly difficult to find and hire additional employees at this time."

"We would like to provide child care, we do not have the personnel or physical space to accomplish this task."

DIFFERING EMPLOYEE NEEDS, INCLUDING FAIRNESS FOR EMPLOYEES WHO DO NOT HAVE CHILDREN: 7%

"There is a diverse need and finding solutions to support all employees in different situations. It can also be a challenge to balance the needs of the employees and schedule changes to meet the needs of our customers during the hours and times they are looking for service."

"Employees come from different areas, different care needs."

"Fairness with employees who do not have or decided not to have children. Equal treatment of all staff regardless of their personal situation."

DIFFICULT TO PROVIDE AS A SMALL OR SEASONAL BUSINESS: 7%

"We are too small to consider this."

"We are only a seasonal business. Funds are limited with what we can do."

LACK OF CHILD CARE AVAILABILITY IN THE COMMUNITY: 6%

"The cost of child care is out of reach for many of our employees. We provide discounted child care but can't provide free. There are very limited options for child care, particularly for infants, and without child care workforce it's difficult to expand child care spots."

"We have a real hesitancy in entering the daycare sector as a provider given the current labor pool. There is a significant lack of quality daycare in our community and so there are so few options for our employees. Family members (grandparents) have stepped in to fill the gap for traditional daycare."

- Factors that would increase business investment and support of ECE: Finances were the biggest perceived barrier, and the top factors that participants said would increase their likelihood of additional ECE support also related to funding:
 - Increased state/federal funding and eligibility for childcare supplements: 56%
 - Grants to businesses to implement childcare programs: 47%
 - State budget and/or policy changes: 23%
 - A substantial increase in demand for childcare benefits from employees: 21%
 - Increased pressure to provide benefits to compete: 13%
 - Actionable plans and stock documentation and contracts: 11%
 - A large number of employees cannot work: 10%
 - Personally seeing the value of additional child care benefits: 10%
 - A state-run FSA program that employers can contribute to: 10%
 - A small number of employees cannot work: 6%
 - Other (largely N/A or negative responses): 4%

Partner Up! Program Data (Supporting Families Together Association)

- Source: *Email from Sherri Underwood (SFTA)*
- For Partner Up! data specifics as of 12/31/22
 - o 219 contracted businesses
 - o 1267 contracted slots (children served)
 - o 841 unique families served
 - o 250 unique providers
 - o \$6.2 million paid in true cost of care (this will increase to \$7.4 million for January)

2022 Childcare Market Survey Results (DCF)

- Source: *2022 Childcare Market Survey Results (DCF)*
- Center Directors are paid 40% less than recommended, Lead Teachers are paid 48% less than recommended, and Teacher Assistants are paid 35% less than recommended

Current Workforce Salaries (Licensed Group Center)				
Position Title	Licensed 2 Star	3 Star	4 Star	5 Star
Center Director	\$33,365	\$37,131	\$38,899	\$44,987
Lead Teacher	\$24,253	\$25,366	\$27,467	\$29,921
Teacher Assistant	\$21,507	\$22,152	\$23,057	\$24,534
Recommended Workforce Salaries				
Position Title	Licensed 2 Star	3 Star	4 Star	5 Star
Center Director	\$40,164	\$44,616	\$57,886	\$75,000
Lead Teacher	\$35,921	\$40,164	\$44,616	\$57,886
Teacher Assistant	\$31,200	\$33,571	\$35,921	\$38,043

Table 15 - Licensed Family Provider

Current Workforce Salaries (Licensed Family Provider)				
Position Title	Licensed 2 Star	3 Star	4 Star	5 Star
Teacher/Owner	\$21,397	\$23,882	\$28,696	\$28,947
Teacher Assistant	\$21,507	\$22,152	\$23,057	\$24,534
Recommended Workforce Salaries				
Position Title	Licensed 2 Star	3 Star	4 Star	5 Star
Teacher/Owner	\$35,921	\$40,164	\$42,390	\$44,616
Teacher Assistant	\$31,200	\$33,571	\$35,921	\$38,043

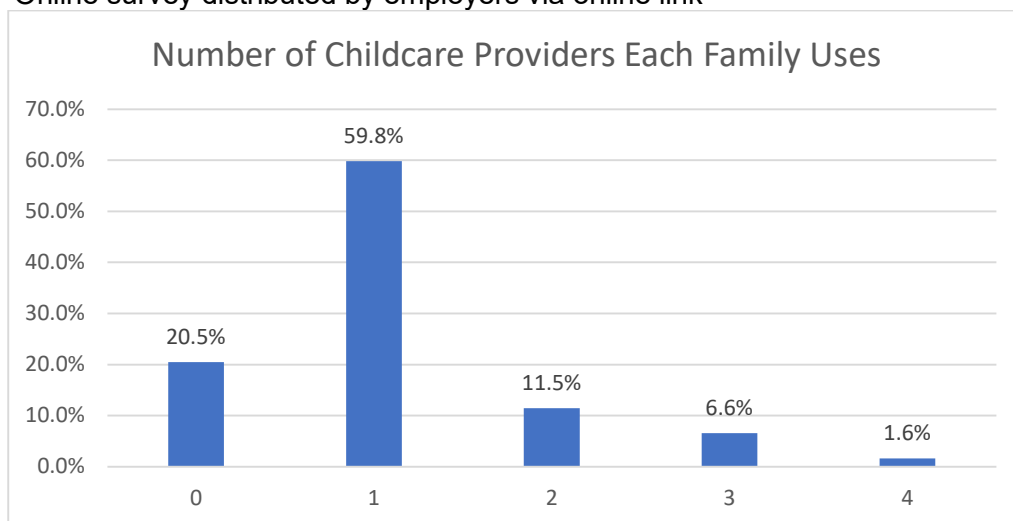
County and Regional Level Surveys

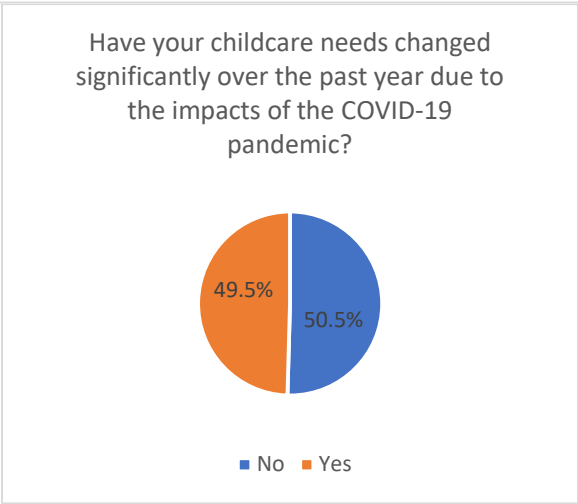
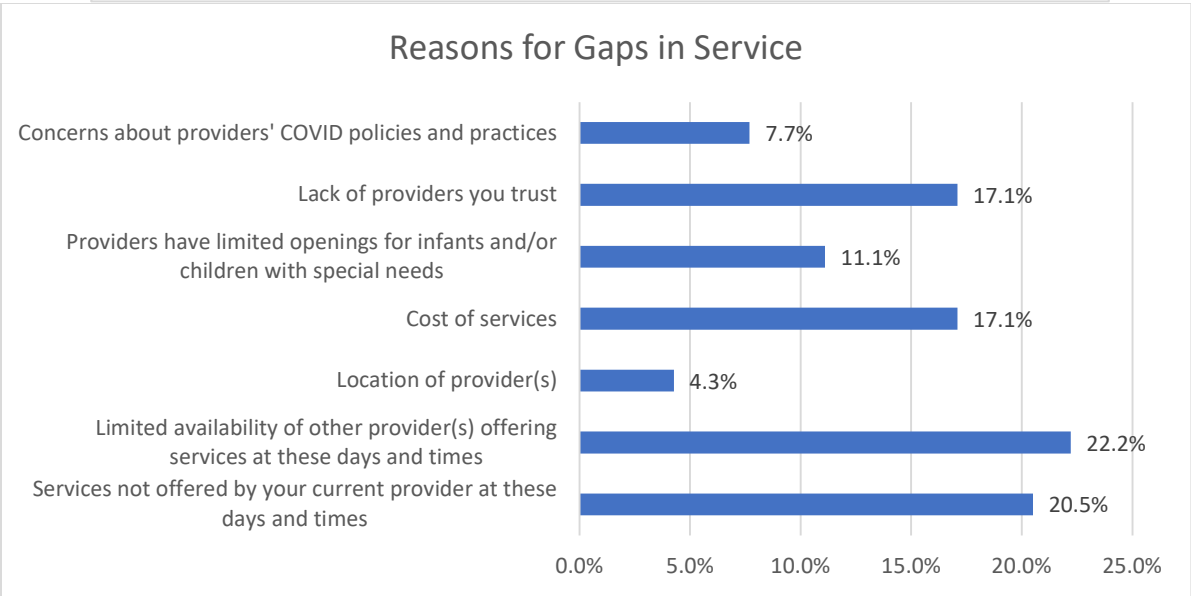
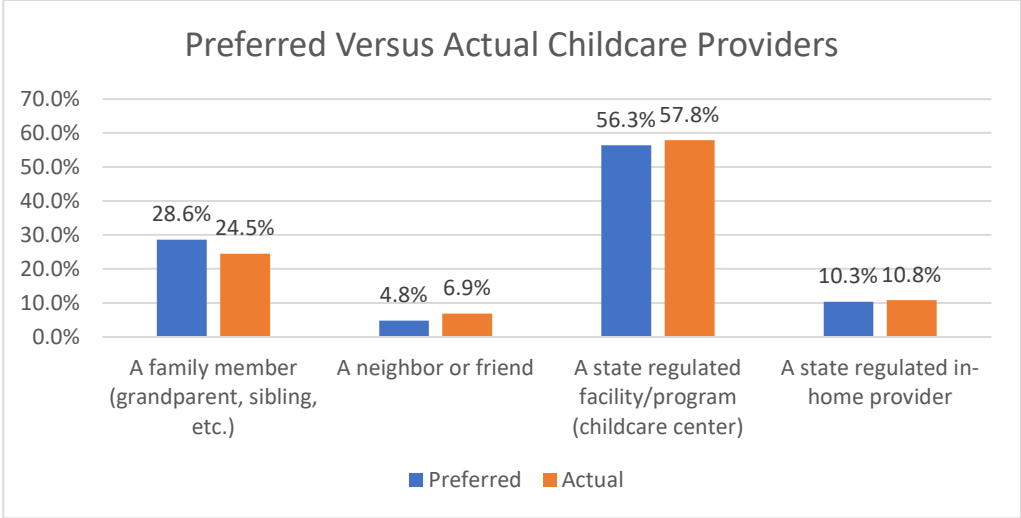
Dodge & Jefferson Parent Survey (Greater Watertown Community Health Foundation)

- Source: *Dodge & Jefferson Survey Exec Summary (GWACCTF)* and *Dodge & Jefferson Survey Slides (GWACCTF)*
- Survey Administration and Methodology
 - o Administered July 15-30, 2020
 - o A total of 735 parents responded
 - o Online survey advertised through social media, email, local employers, and school district officials
- 52.5% of respondents have a difficult time finding childcare in the area
- 74% of parents have missed work due to lack of childcare; 48% were late and 51% reported being unable to focus at work due to lack of childcare. 46% declined overtime hours because of lack of childcare.
- As a result of COVID:
 - o 59% families need care for young school age children if school is virtual
 - o 27% parents will care for children while working remotely
 - o In 38% of households, one adult will reduce hours or may need to leave the workplace
 - o 38% of families answered, "I don't know what we'll do if school is virtual."
- In comparison with higher income families (household incomes > \$75,000/year, lower income households (incomes less than \$50,000/year) are more likely to need weekend care and also significantly less likely to utilize summer or out of school time camps for school-age children.

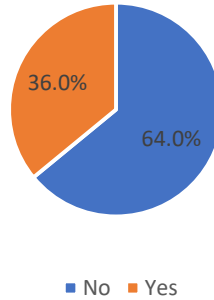
Winnebago County Survey (UW Oshkosh)

- Source: *Winnebago County Survey (UW Oshkosh)*
- Survey Administration and Methodology
 - o Administered December 3, 2021 through March 15, 2022
 - o A total of 143 residents responded
 - o Online survey distributed by employers via online link





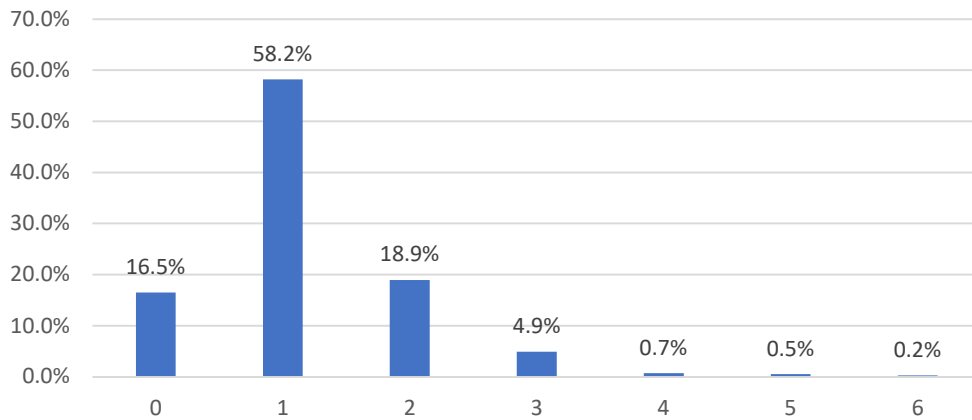
Would you be willing to pay more than you currently do to find services that meet your needs?

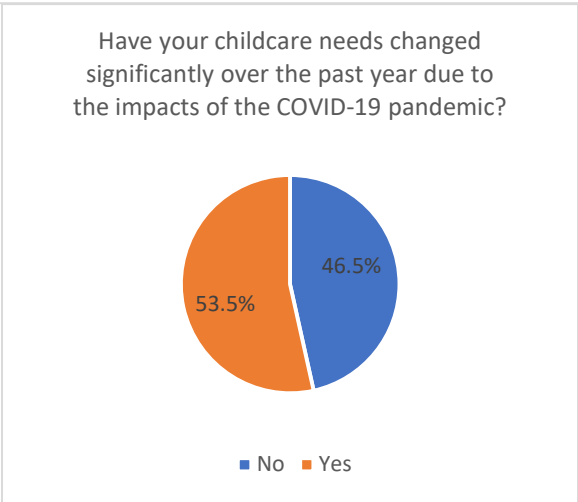
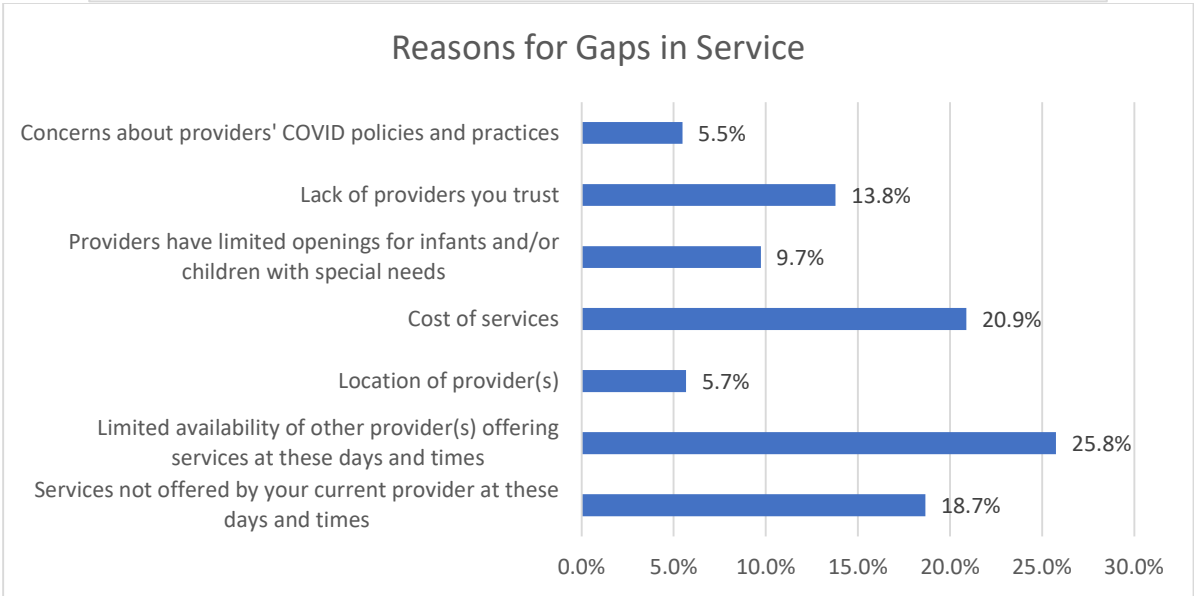
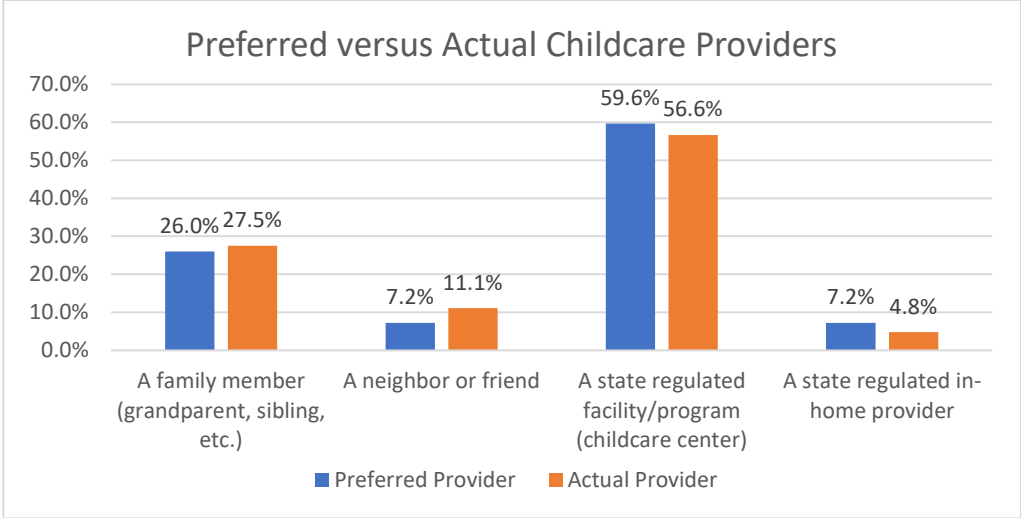


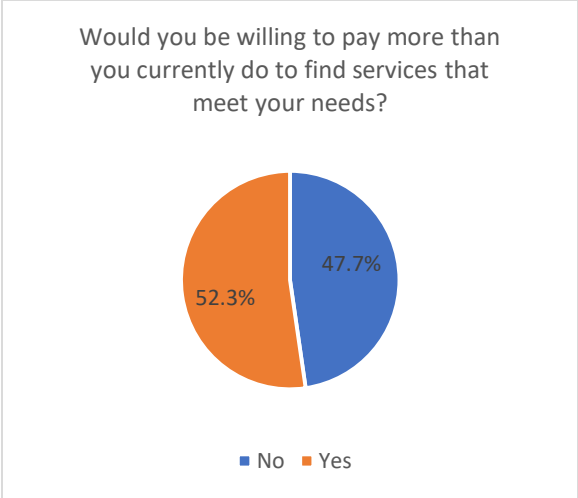
Fond du Lac County Survey (UW Oshkosh)

- Source: *Fond du Lac County Survey (UW Oshkosh)*
- Survey Administration and Methodology
 - o Administered December 3, 2021 through March 15, 2022
 - o A total of 474 residents responded
 - o Online survey distributed by employers via online link

Number of Childcare Providers by Family

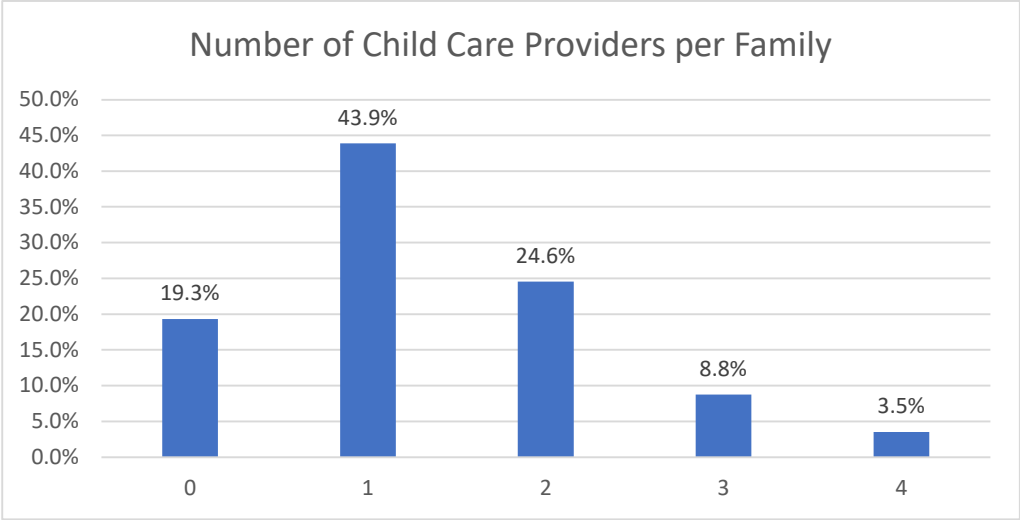


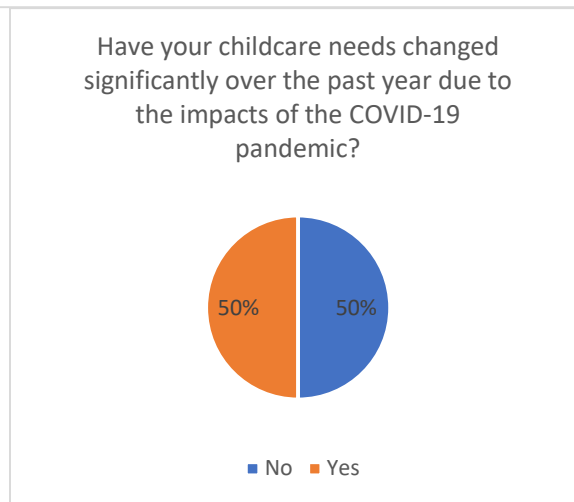
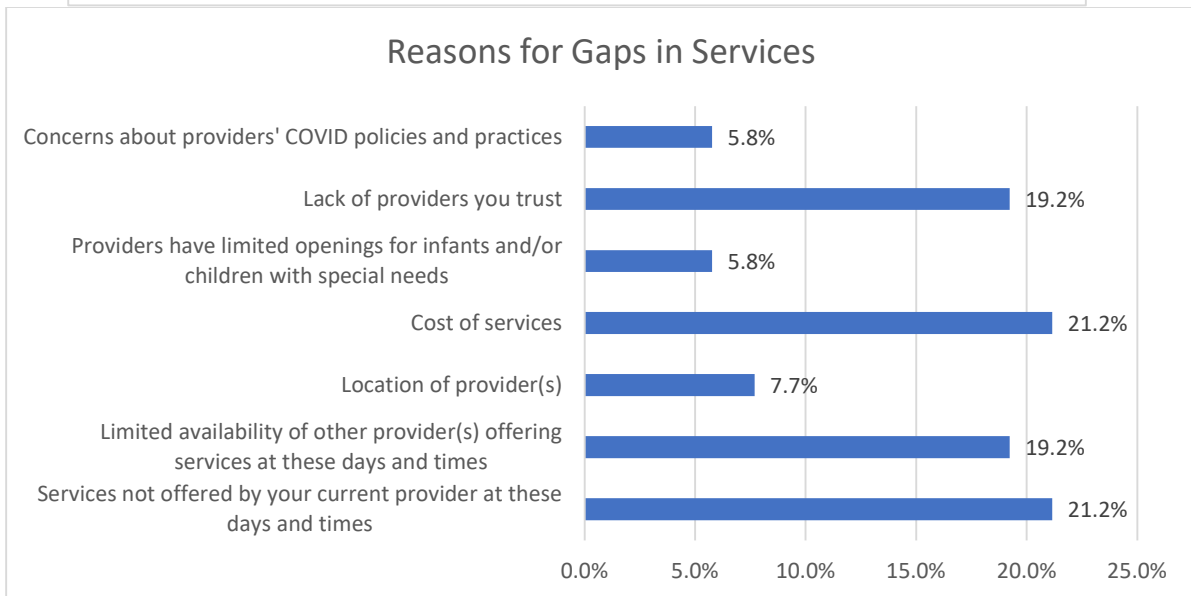
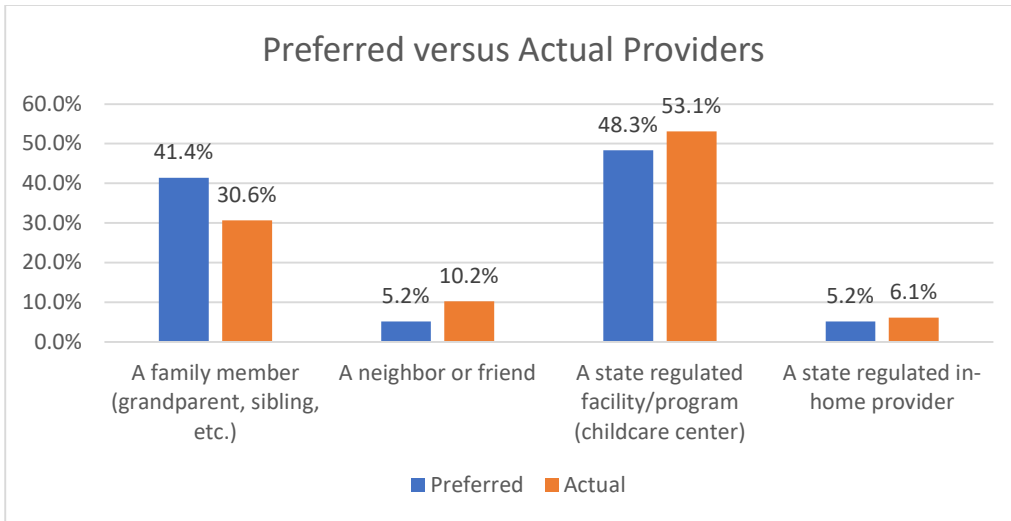


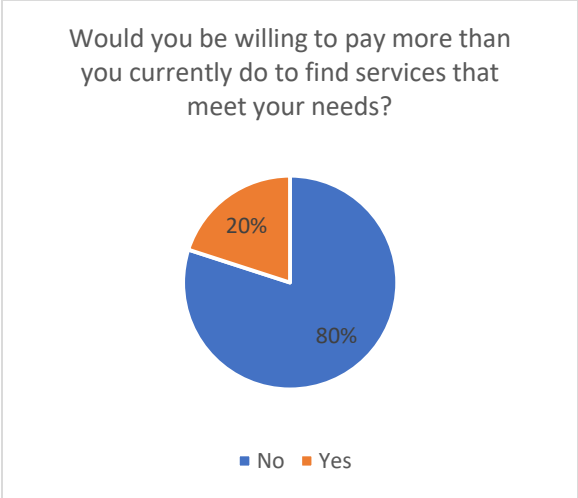


Outagamie County Survey (UW Oshkosh)

- Source: *Outagamie County Survey (UW Oshkosh)*
- Survey Administration and Methodology
 - o Administered December 3, 2021 through March 15, 2022
 - o A total of 60 residents responded
 - o Online survey distributed by employers via online link

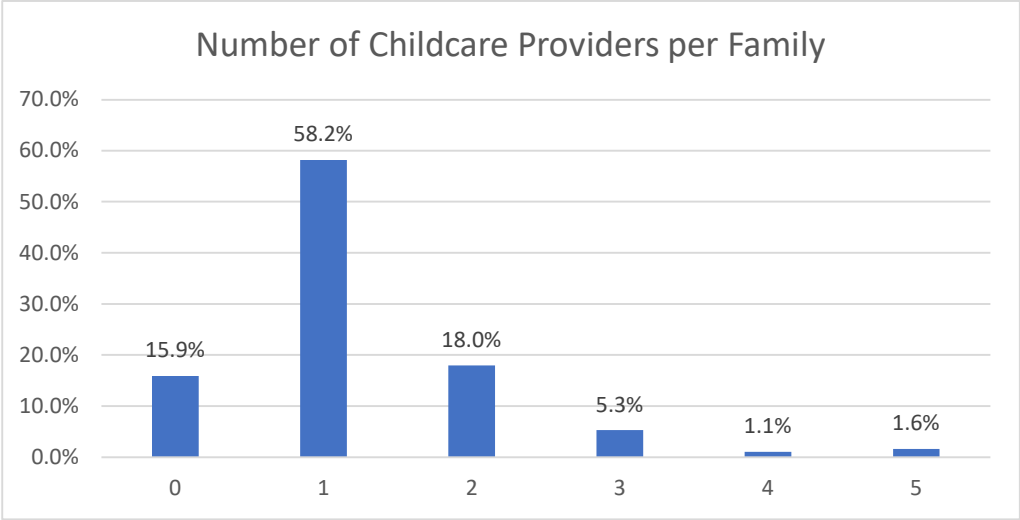


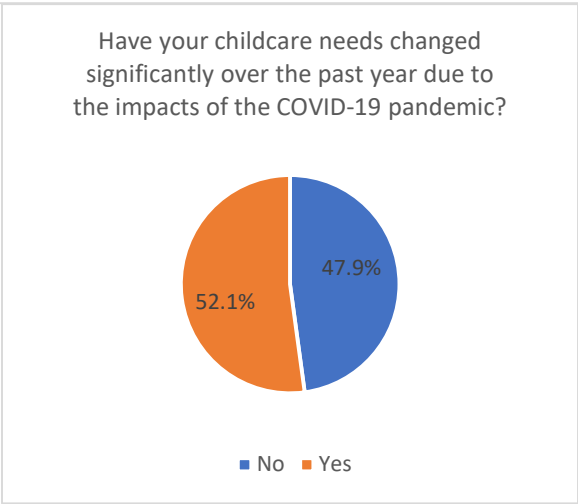
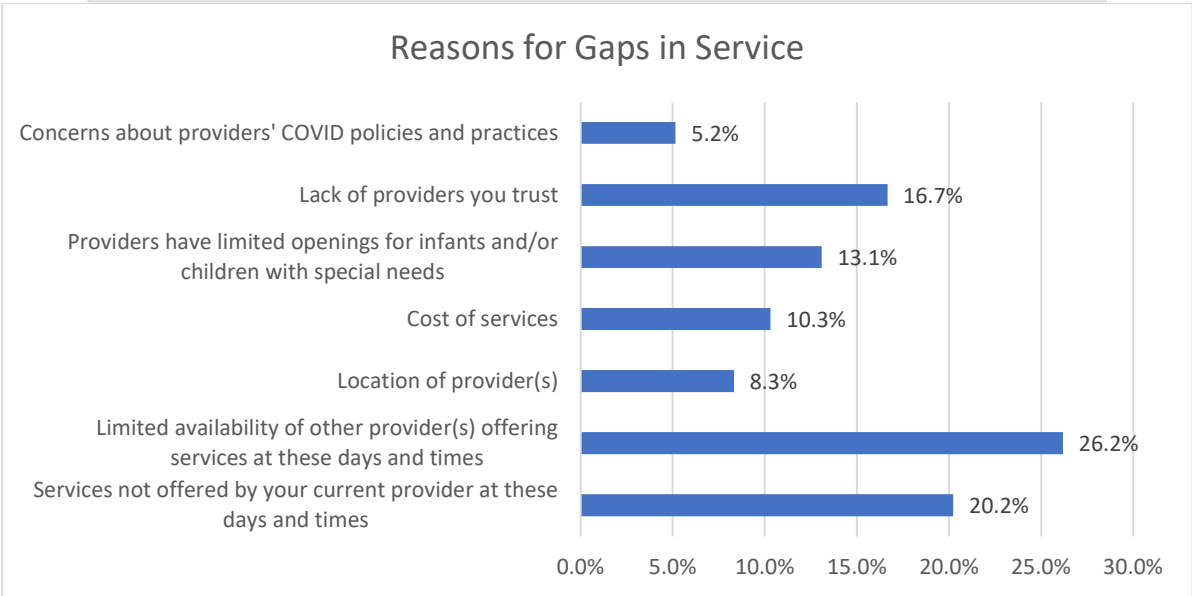
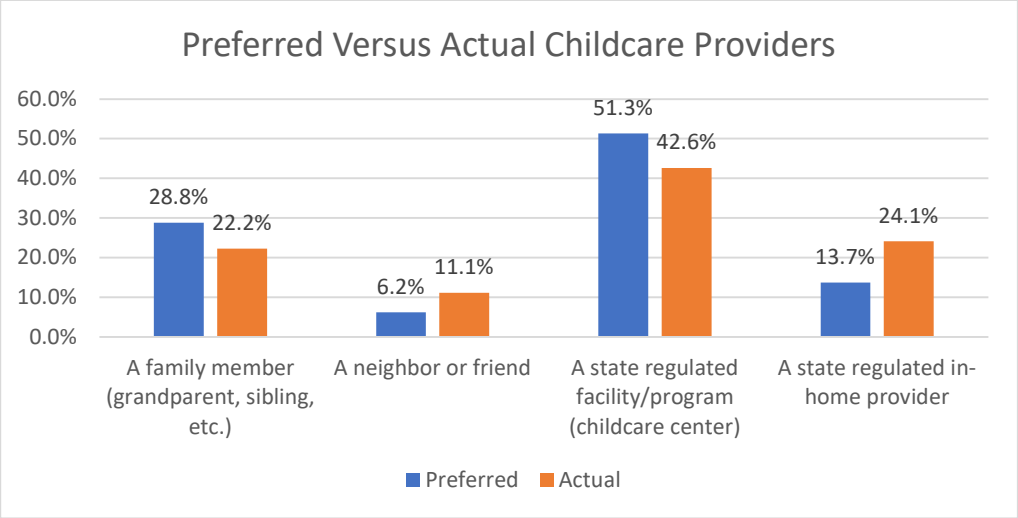


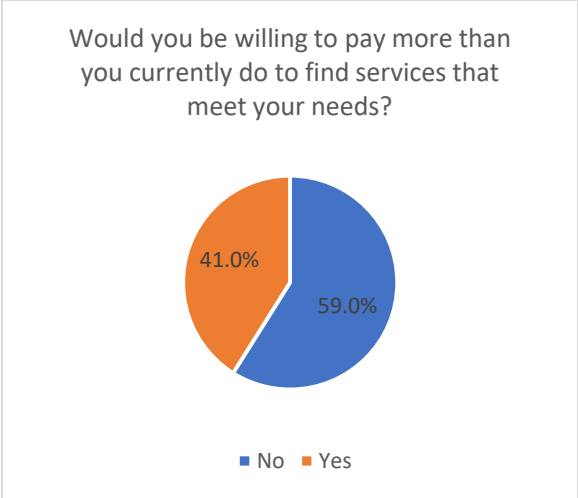


Dodge County Survey (UW Oshkosh)

- Source: *Dodge County Survey (UW Oshkosh)*
- Survey Administration and Methodology
 - o Administered December 3, 2021 through March 15, 2022
 - o A total of 238 residents responded
 - o Online survey distributed by employers via online link

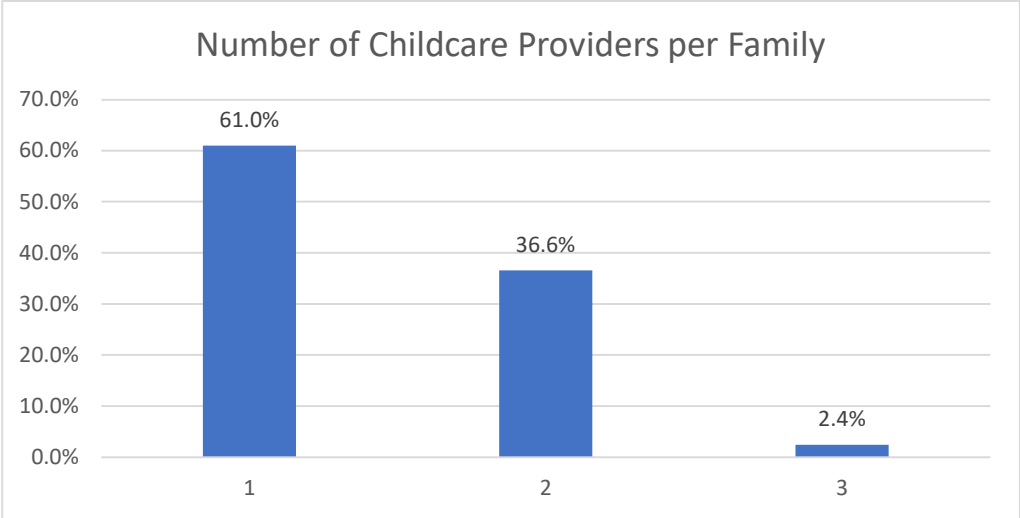


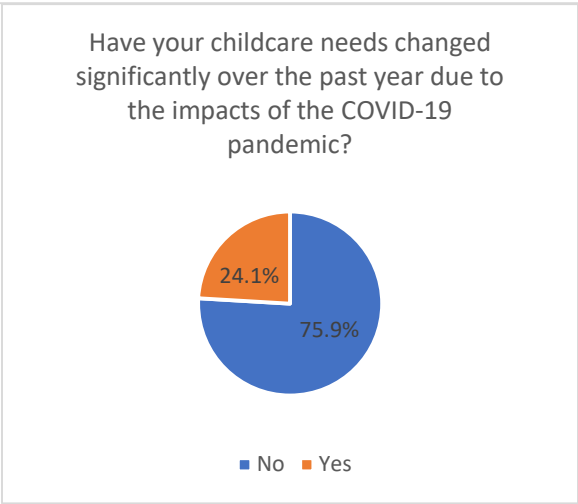
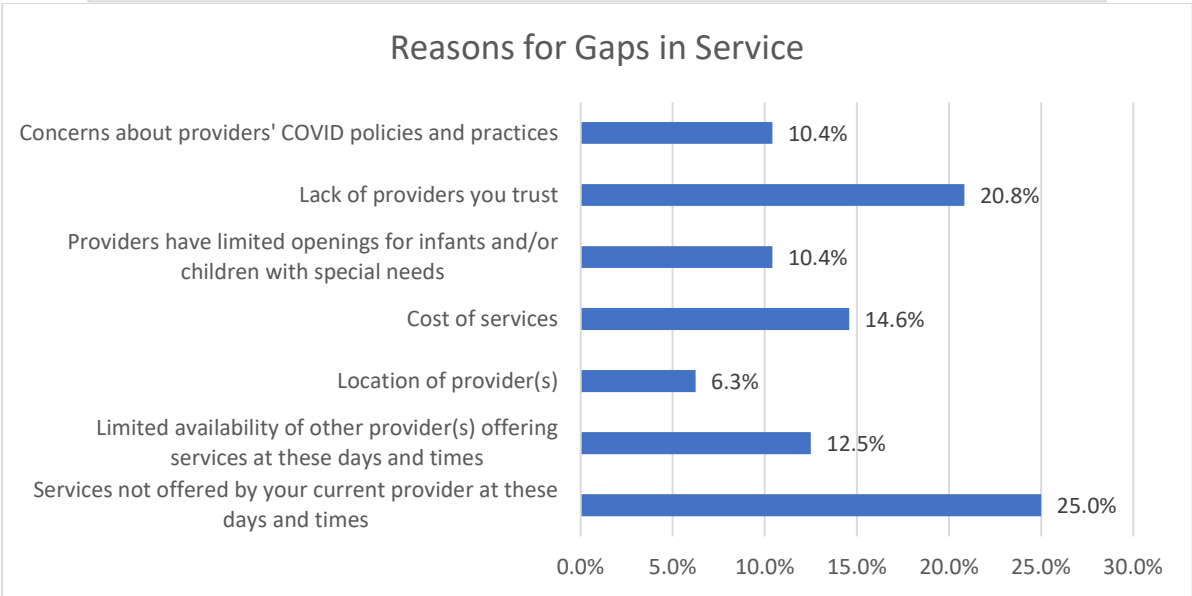
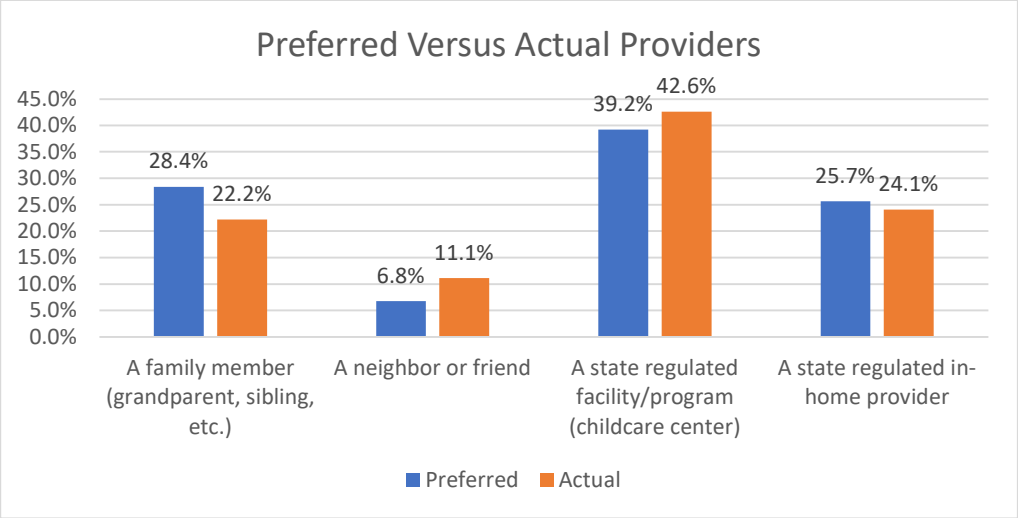


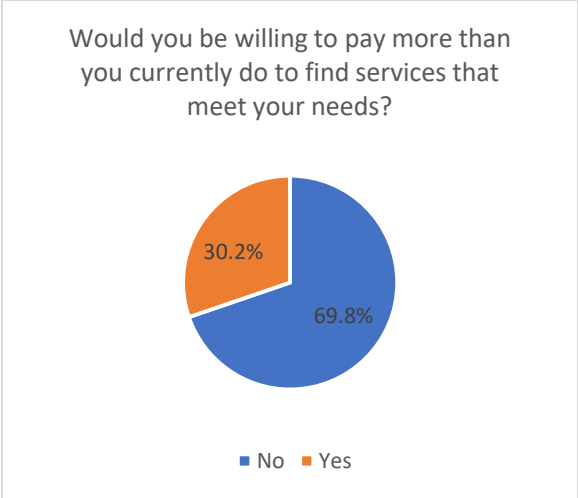


Calumet County Survey (UW Oshkosh)

- Source: *Calumet County Survey (UW Oshkosh)*
- Survey Administration and Methodology
 - o Administered December 3, 2021 through March 15, 2022
 - o A total of 91 residents responded
 - o Online survey distributed by employers via online link



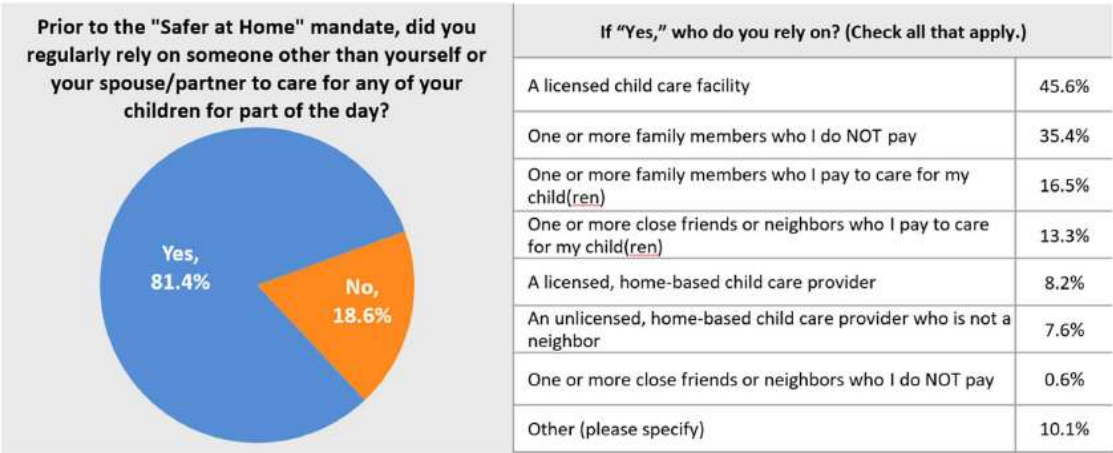


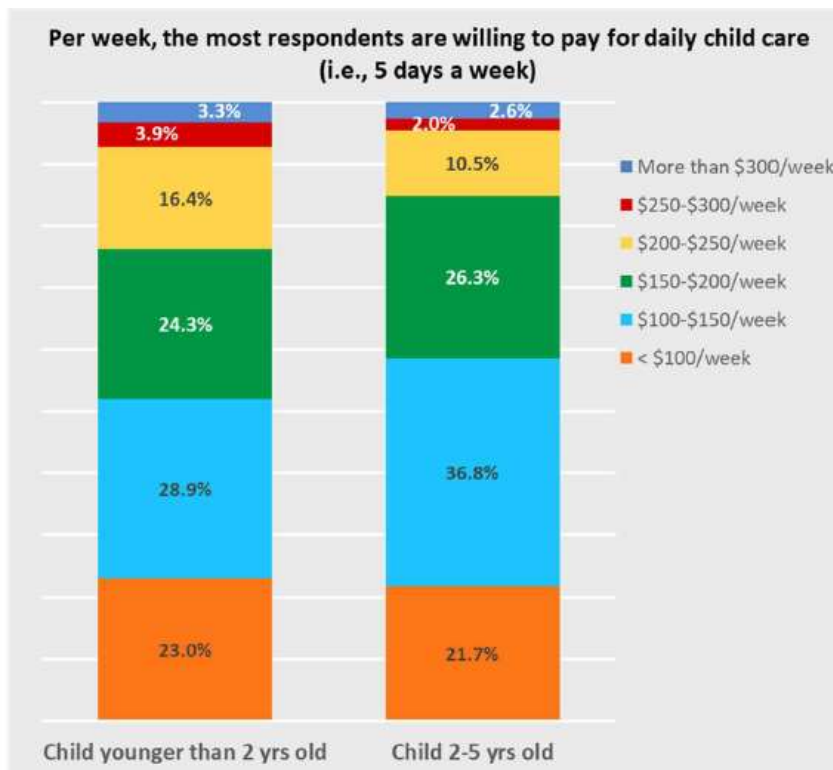
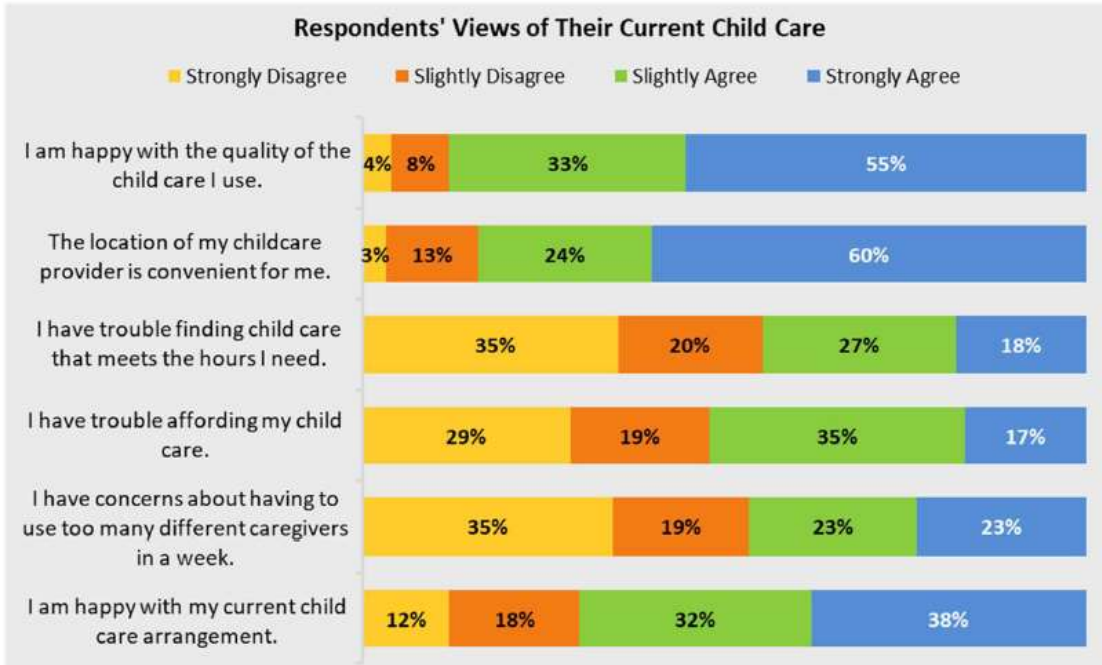


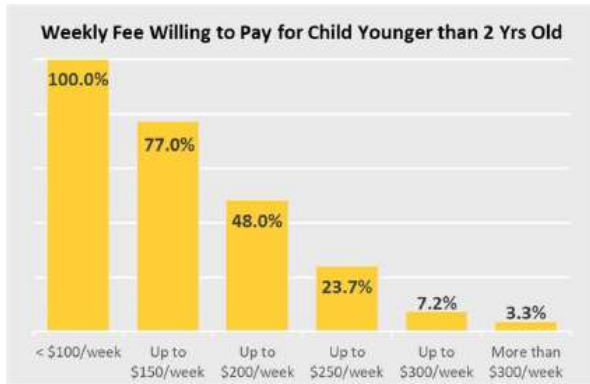
Door County Parents Survey (UW of Door County)

- Source: *Door County Survey Summary (UW of Door County)*
- Survey Administration and Methodology
 - o Administered April 30-May 18, 2020
 - o 222 completed a portion of the survey and of that number 154 completed the entire survey, responses are from individuals who live or work in Door County and have children younger than 13 years old living at home
 - o Surveys were circulated and completed online

Who is responsible for taking care of the child(ren) in your household?		
	#	%
I share the care of my child(ren) with my spouse/partner who I live with	169	78.2%
I share the care of my child(ren) with the other parent of my child(ren) who I don't live with	12	5.6%
I am a single parent & have full responsibility for taking care of my child(ren)	27	12.5%
Other	8	3.7%

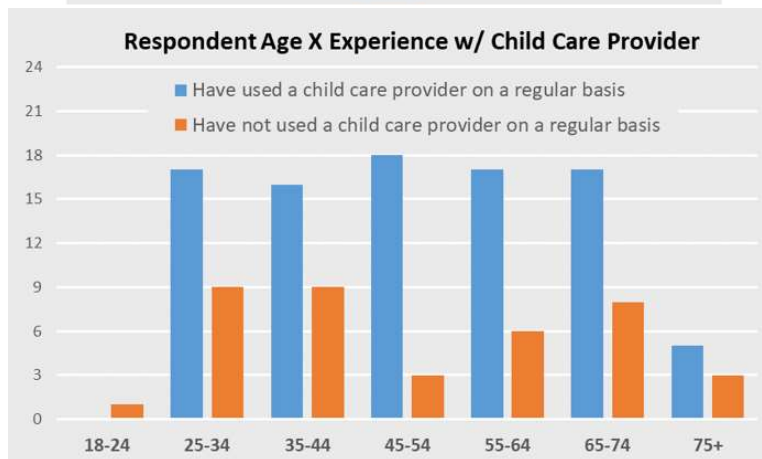
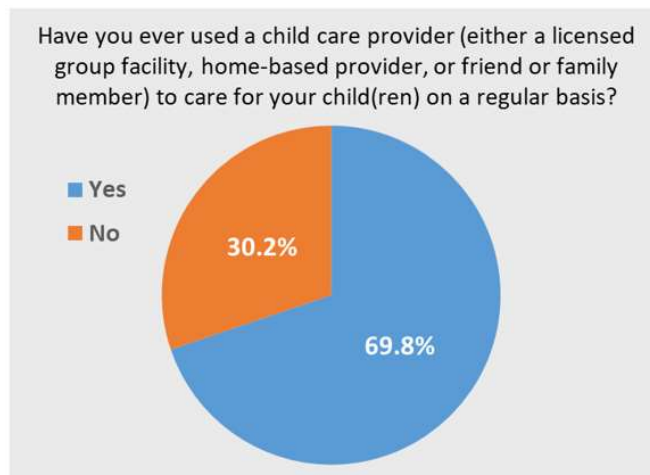




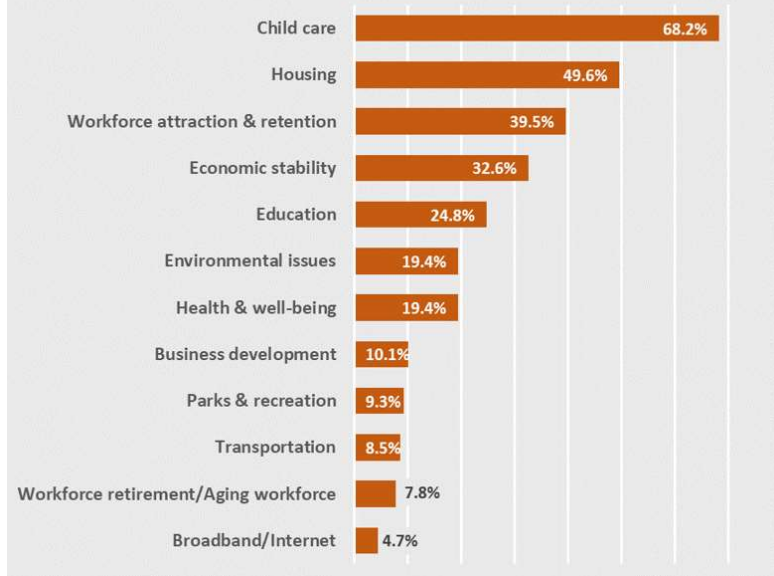


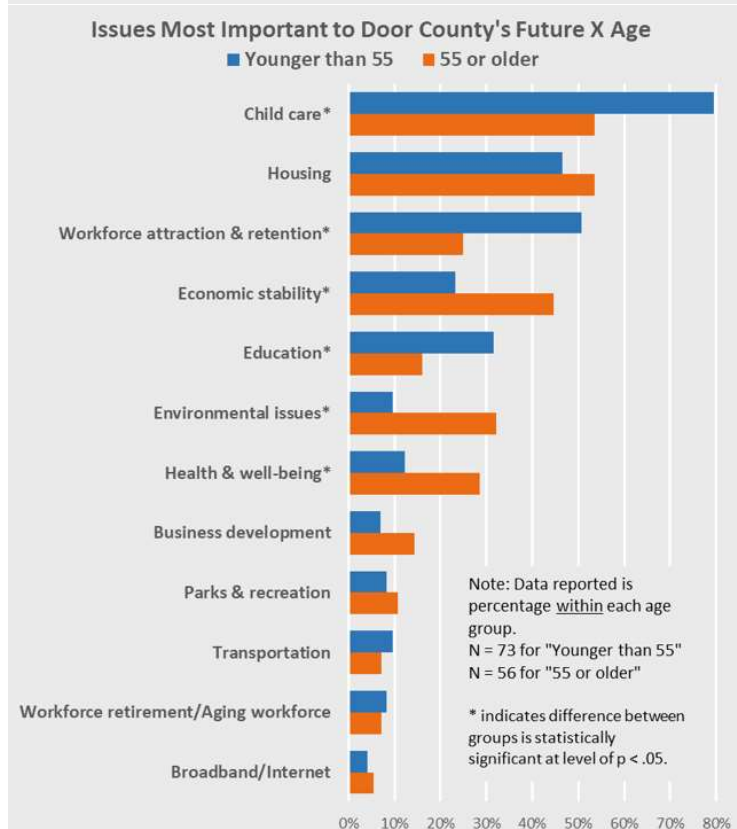
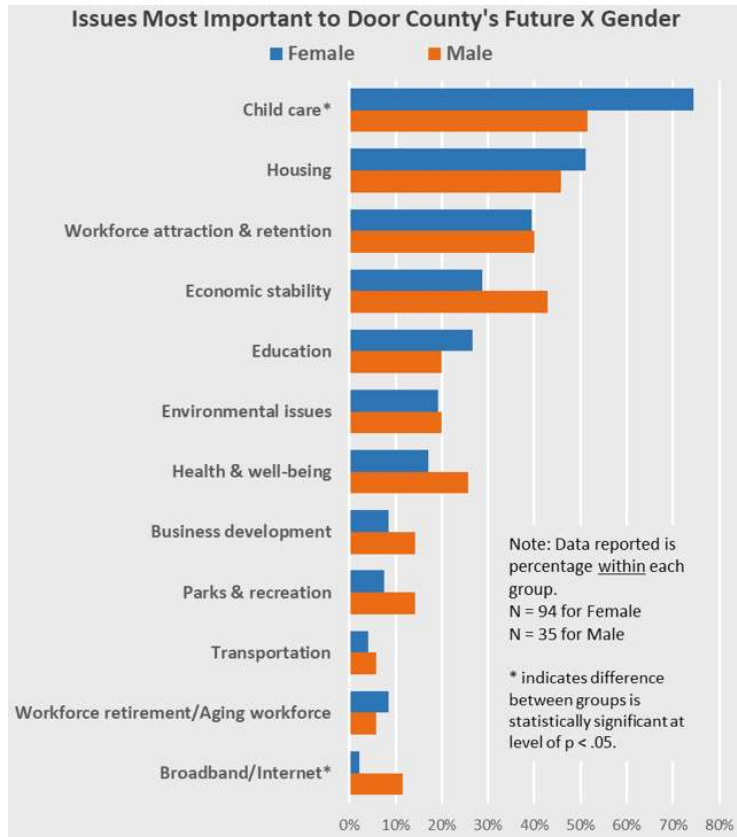
Door County Community Survey (UW of Door County)

- Source: *Door County Community Aspirations Survey Summary (UW of Door County)*
- Survey Administration and Methodology
 - o Administered November 2020
 - o 129 responses from individuals living in Door County
 - o Surveys were circulated and completed online



Issues most important to Door County's future
 [Respondents were able to identify up to three.]





How important is it for:	Not At All	Slightly	Moderately	Very
ALL Door Co families to have access to affordable, high-quality child care?	0%	2%	6%	92%
child care for kids younger than 5 in Door Co to be affordable for all families?	0%	2%	5%	93%
child care for kids younger than 5 yrs old in Door Co to be high-quality?	0%	2%	7%	91%
individuals who routinely care for children younger than 5 to have training and education in early childhood education?	0%	6%	26%	67%
childcare providers to receive a "living wage"?	0%	2%	8%	90%

Manitowoc County Childcare Study (Progress Lakeshore)

- Source: *Manitowoc County Childcare Study (Progress Lakeshore)*
- Survey Administration and Methodology
 - o Administered January 2023
 - o 654 completed interviews representing a maximum error of +/- 3.8% at 95% confidence
 - o Study respondents were recruited through organizations and their contacts
- 46% of the respondents indicate childcare issues have significant impact on their ability to fully participate in the workforce
 - o Respondents with incomes under \$50k showed the highest impact of childcare in their workforce participation
- 58% of respondents who were not working but physically able to said that childcare issues were a barrier to the entering the workforce

Rock County Employer Survey (Rock County Economic Development)

- Source: *Rock County Employer Survey (Rock County ED)*
- Survey Administration and Methodology
 - o Administered Spring 2022
 - o 102 employers participated in the survey
 - o Employers were both large and small and spread across various industries, the survey was delivered electronically via Survey Monkey
- Seventy-eight percent of the respondents indicated they didn't provide any type or form of direct / indirect childcare assistance to their employees.
- With regards to employee classification or grouping, over 70% of respondents noted that entry-level employees were likely the largest benefactor of said resources. Meanwhile, 23% of respondents indicated that all employee groupings leveraged these benefits, accordingly.
- Nearly 50% of respondents rated the importance of childcare as Important-to-Very Important for their employee recruitment and retention efforts; less than 20% noted it was effectively a non-issue. The remaining 30% took a stance of neutrality as it concerned the relative importance that childcare plays in the job market – specifically as it concerned their organization's staffing profile.
- When asked whether childcare was impacting their annual vacancy rates, 26% indicated they were unsure and/or didn't know. The remainder of the responses were categorized as follows:
 - o Childcare is likely responsible for 0-9% of the company's annual vacancy rates = 42% of the respondents.

- Childcare is likely responsible for 10-19% of the company's annual vacancy rates = 18% of the respondents.
- Childcare is likely responsible for 20-39% of the company's annual vacancy rates = 13% of the respondents.
- Childcare is likely responsible for 40-50% (and greater) of the company's annual vacancy rates = 1% of the respondents.
- Concerning the impacts on an organization's annual absenteeism rates, 15% were unsure or didn't know the answer; meanwhile, the remainder of respondents reported those impacts as follows
 - Childcare is likely responsible for 0-9% of the company's annual absenteeism rates = 27% of the respondents.
 - Childcare is likely responsible for 10-19% of the company's annual absenteeism rates = 15% of the respondents.
 - Childcare is likely responsible for 20-39% of the company's annual absenteeism rates = 33% of the respondents.
 - Childcare is likely responsible for 40-50% (and greater) of the company's annual absenteeism rates = 10% of the respondents.
- Overall, respondents were asked to rate the difficulty of attracting and retaining staff, with a rating of 1 representing the lowest and 5 being the most difficult. Fifty-two percent of the respondents rated the difficulty level between 4 and 5; 26% rated the level between 2 and 3; and 22% offered a rating of 1.

Marathon County Workplace Survey (Marathon County Early Years Coalition)

- Source: *Marathon County Workplace Survey (MCEYC)*
- Survey Administration and Methodology
 - Administered June 2020
 - 756 responses from employees who work in Marathon County
 - An online survey instrument was used
- Survey minimally covers childcare, looks at general "family friendly policies" that businesses could implement and polled employees on what of those they preferred the most
- The survey does show that childcare is a niche, but strongly felt issue

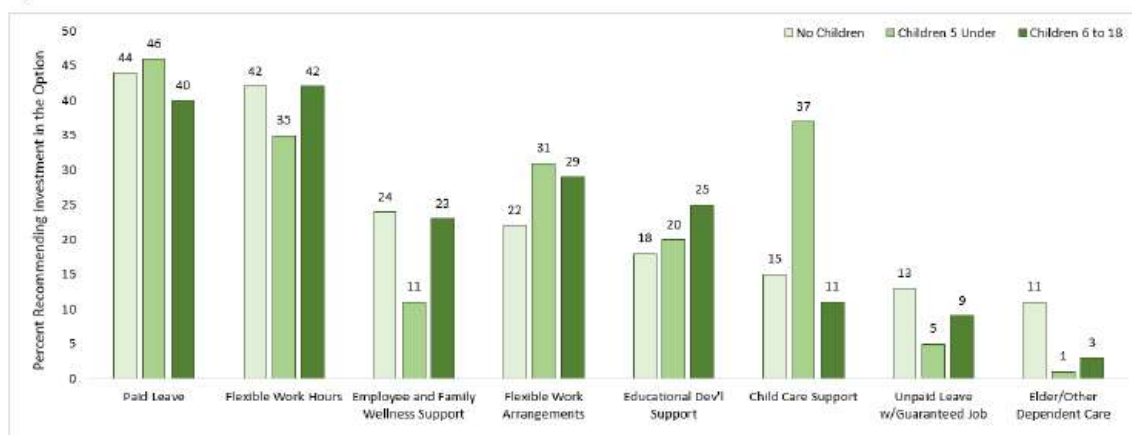
TABLE 7 – Summary of Employee Preferences for Employer Investment

▲ HIGH = 31 to 45% ◆ MEDIUM = 16 to 30% ▼ LOW = 0 to 15%

FAMILY-FRIENDLY POLICY OPTION	No children (n=315)	Children ≤ 5 (n=177)	Children 6 to 18 (n=248)
Childcare support	▼ (15%)	▲ (37%)	▼ (11%)
Educational or professional dev. support	◆ (18%)	◆ (20%)	◆ (25%)
Elder or other dependent care	▼ (11%)	▼ (1%)	▼ (3%)
Employee and family wellness support	◆ (24%)	▼ (11%)	◆ (23%)
Flexible work arrangement (work from home)	◆ (22%)	▲ (31%)	◆ (29%)
Flexible work hours	▲ (42%)	▲ (35%)	▲ (42%)
Paid leave	▲ (44%)	▲ (46%)	▲ (40%)
Unpaid leave & guaranteed job on return	▼ (13%)	▼ (5%)	▼ (9%)

FIGURE 1 – Percentages of Employee Preferences for Company Investment

Figure 1. The percent of participants who selected each family-friendly option in response to being asked to select only TWO that they would encourage their organization to invest in.



Eau Claire and Chippewa Counties Employer Survey (Child Care Task Force in Eau Claire/Chippewa Counties)

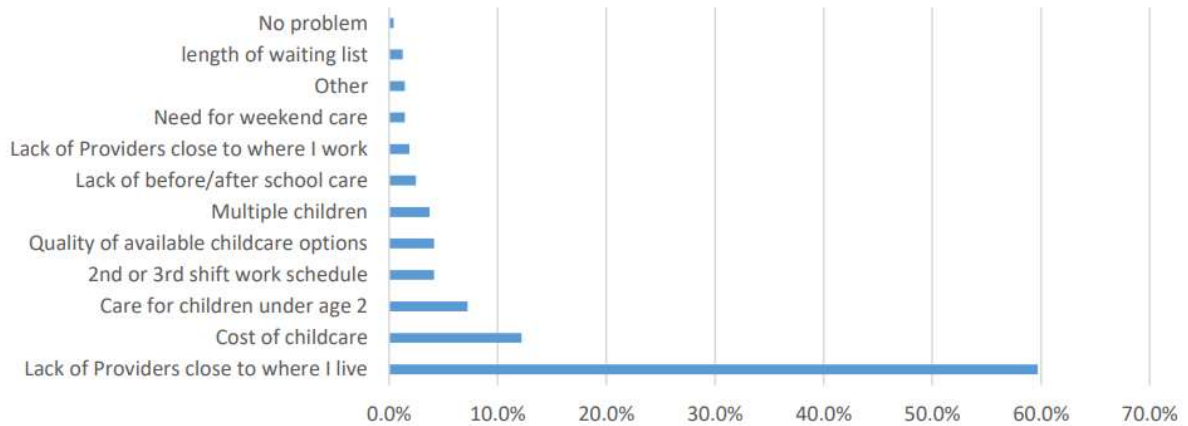
- Source: *Eau Claire and Chippewa Survey (CCTF)*
- Survey Administration and Methodology
 - o Administered May 2022
 - o 222 companies and employers in Eau Claire and Chippewa Counties
 - o An online survey instrument was used
- 73% of employers said that their employees had requested flexible work hours because of childcare issues, 64% reported that employees had been absent from work due to childcare issues, 54% of employers reported that employees had been late to work due to childcare issues, and 46% reported that their employees were under stress about childcare arrangements and have been unable to work to their full capacity
- 21.6% of employers report their employees terminating their employment due to a lack of childcare in Chippewa or Eau Claire counties
- As an employer, 51% are most concerned about childcare’s availability while 28% are most concerned about the cost of childcare

La Crosse County Childcare Survey (UW Madison)

- Source: *La Crosse County Childcare Survey (UW Madison)*
- Survey Administration and Methodology
 - o Administered April 2019
 - o 506 responses from La Crosse employees with at least one child requiring childcare in their household, 490 of those respondents lived in Lacrosse County
 - o An online survey instrument was used, 4.34% margin of error at 95% confidence
- 86% of responding families indicated a limited ability in childcare options in La Crosse County
- Over half (56%) of La Crosse County families utilized a regulated childcare provider, while nearly 1 in 4 utilized a non-regulated childcare provider.
- The largest majority of families paid between \$500 and \$1000 for childcare monthly, however over 27% pay \$1,000 or more per month for childcare expenses.

- Childcare expenses represented at or greater than 25% of total family income for 19% of families surveyed (nearly 1 in 5).
- 83% ranked their childcare services as excellent or good.
- 38% of survey respondents indicated childcare issues affect their work productivity.
- There is one childcare slot for every four kids under the age of eleven in La Crosse County

Issues Affecting Child Care Search



Childcare Capacity Data

Statewide Capacity Data (4-C)

- Source: *Capacity Data Statewide and South-Central Region (4-C)*

Year	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	%
# of facilities	6,177	5,789	5,494	5,207	4,954	4,752	4,561	4,536	4,541	4,543	-26%
Total Capacity	164,934	163,206	162,876	164,008	191,827	188,640	186,875	185,916	185,188	186,673	13%

South Central Capacity Data (4-C)

- Source: *Capacity Data Statewide and South-Central Region (4-C)*

Year, then % change from 2013 to 2022	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	% change
Columbia # of facilities	58	61	52	50	51	47	48	43	39	36	-38%
Columbia Total Capacity	1553	1593	1514	1477	1584	1605	1636	1546	1468	1429	-8%
Dane # of facilities	692	662	657	647	617	579	547	547	534	515	-26%
Dane Total Capacity	20592	20808	21514	22360	24129	24246	24749	24925	24858	24597	19%
Dodge # of facilities	63	61	54	50	49	47	42	40	40	40	-37%

Dodge Total Capacity	1727	1706	1683	1623	1662	1665	1578	1505	1561	1786	3%
Grant # of facilities	72	67	63	60	55	52	45	40	39	38	-47%
Grant Total Capacity	1071	1087	1140	1114	1169	1181	1137	1089	1081	1037	-3%
Green # of Facilities	52	51	44	40	38	34	35	34	34	30	-42%
Green Total Capacity	1035	980	981	1017	1003	999	977	941	969	919	-11%
Iowa # of Facilities	32	24	21	19	17	18	16	15	16	17	-47%
Iowa Total Capacity	315	278	277	308	310	341	368	340	349	400	27%
Jefferson # of Facilities	54	46	42	39	44	40	39	40	40	38	-30%
Jefferson Total Capacity	1782	1655	1555	1539	1646	1617	1697	1698	1575	1577	-12%
Lafayette # of Facilities	22	18	18	18	18	17	16	13	14	13	-41%
Lafayette Total Capacity	231	214	209	237	287	257	249	230	218	196	-15%
Rock # of Facilities	141	127	124	114	118	116	102	103	99	99	-30%
Rock Total Capacity	4060	3907	3871	3780	3838	3744	3835	3780	3828	3851	-5%
Sauk # of Facilities	67	67	66	62	59	56	51	50	45	41	-39%
Sauk Total Capacity	1068	1072	1077	1238	1224	1188	1240	1189	1245	1049	-2%
Walworth # of Facilities	53	50	48	49	52	52	49	46	41	40	-25%
Walworth Total Capacity	1683	1493	1522	1548	1635	1679	1713	1584	1496	1573	-7%
Total # of Facilities	1306	1234	1189	1148	1118	1058	990	971	941	907	-31%
Total Capacity	35117	34793	35343	36241	38487	38522	39179	38827	38648	38414	9%

West Central Capacity Data (Child Care Partnership)

- Source: *West Central Capacity Data (Child Care Partnership)*
- Survey of childcare providers in Western Wisconsin and their capacity from Nov 2022
- 10 county area: Buffalo, Chippewa, Dunn, Eau Claire, Jackson, Pepin, Pierce, Polk, St. Croix, and Trempealeau
- Among the 81 regulated childcare centers which responded, there are 324 open staff positions despite them hiring 590 staff members in the past 12 months
 - o This results in a licensed capacity of 6,606 being decreased to an adjusted capacity of 4,941
 - o 90% of centers have a wait list with a total of 4,304 children on the wait list
 - o Without support around the childcare staffing crisis, 16% of group child care programs reported they were facing closure due to the ongoing issue of not having qualified staff.

- Without ongoing financial support (through programs such as Child Care Counts, Partner Up!, etc.) 44% of programs were unsure they would remain in business and 21% felt they would close

Northern Capacity Data 2022 (Northwest Connection Family Resources)

- Source: *Northern WI Capacity Survey 2022 (NCFR)*
- Completed March 2022
- Covered 14 counties, 7 tribes, and 44 programs responded to the survey
- 19 classrooms in total were closed due to lack of qualified staff
- 15% of provider licensed capacity isn't being utilized due to lack of staff and closed classrooms
 - Or put another way, provider capacity is reduced to 85% due to a lack of staff and closed classrooms
 - This means an additional 334 children could be served if providers could hire more staff
- 77% of providers have experienced higher rates of staff turnover or staff shortages due to the pandemic
 - There were 104 open staff positions
- 25% of providers experienced a change in the director position since March 2020
- These providers hired 224 staff in the past 12 months
- 77% of providers have a waiting list for children
 - About 400 children under 3 years old
 - About 237 children over 3 years old
- 18% of providers are facing closure due to low staffing
- Without support that addresses the staffing crisis, 43% of providers are either likely or extremely likely to close within one year
- Additional data that was emailed by NCFR Director:
 - Regulated programs in the 14 county and 7 tribal area (certified, family licensed, and group) as of Dec 31st of each year
 - 2016, 283
 - 2017, 259
 - 2018, 237
 - 2019, 207
 - 2020, 198
 - 2021, 190
 - 2022, 184

Northern Capacity Data 2020 (Northwest Connection Family Resources)

- Source: *Northern WI Provider Survey 2020 (NCFR)*
- Completed February 2020, online and telephone survey. Covered 14 counties, 7 tribes, and 155 providers completed the survey
- There were 4,940 childcare slots among the 14 counties and 7 tribes with them being 93.5% full
 - Ashland County/Bad River Tribe were 86% full
 - Barron County were 92% full

- Bayfield County/Red Cliff Tribe were 91% full
- Burnett County/St. Croix Tribe were 93% full
- Douglas County was 96% full
- Florence County was 93% full
- Forest County/Forest County Potawatomi Tribe/Sokaogon Tribe were 96% full
- Iron County was 100% full
- Oneida County was 95% full
- Price County was 91% full
- Rusk County was 91% full
- Sawyer County/Lac Courte Oreilles Tribe was 93% full
- Vilas county/Lac du Flambeau Tribe was 97% full
- Washburn County was 94% full

Central Capacity Data 2010-2022 (Childcaring)

- Source: *Email from Kelly Borchardt (Childcaring)*

	Adams	Clark	Lang	Lin	Mar	Marq	Port	Taylor	Waush	N Wood	S Wood	Total
2022 Data												
#Provider	8	22	12	14	83	6	47	10	15	26	33	276
Capacity	127	504	277	419	3414	158	1831	275	389	1280	956	9630
2010 Data												
#Provider	14	38	24	51	244	8	91	23	25	77	96	691
Capacity	167	604	426	711	4347	235	2181	302	524	1671	1490	12658

La Crosse County Capacity (The Parenting Place)

- Source: *La Crosse County Childcare Capacity (The Parenting Place)*
- March 2022, phone survey of regulated childcare centers in La Crosse County
- 19% of responding centers are facing closure due to low staffing
 - These centers represent 372 current slots for children
 - All these centers are in rural communities, none are in the City of La Crosse
- 7% are unlikely to be in business one year from now without additional funding that addresses the staffing crisis
- An additional 26% of responding childcare centers report they are unsure if they will be in business one year from now without additional funding support to address the staffing crisis
- There are 74 open positions in existing County childcare centers this is an increase from 68 open positions in September 2021
- 5 classrooms in existing childcare centers are closed due to staff shortages. All of these classrooms are outside of the city of La Crosse.
- 7 centers report multiple classrooms with reduced capacity to care for children due to staffing. 2 of these are in the city of La Crosse and 5 are outside of city.
- 1,292 children are on waiting lists for childcare.
 - 85% of childcare centers in La Crosse County currently have a waiting list (most of those that don't have a waiting list do not maintain one)
- 878 children under 3 are currently on waiting lists (some children may be on multiple waiting lists) 528 are from centers in the City; 350 are from centers in the rest of the county
- 414 children 3 and over currently on waiting lists; 194 are from centers in the City; 220 are from centers in the rest of the county

Child Care Capacity Survey Summary Data – March 2022

County	# Of Open Positions	# of Classrooms Closed	# of Slots that Could be Added	# of Children on Waiting Lists
Monroe	6	3	50	183
Juneau	1	0	0	59
Vernon	7	0	3	39
Crawford	3	1	8	22
Richland	No Data Reported			

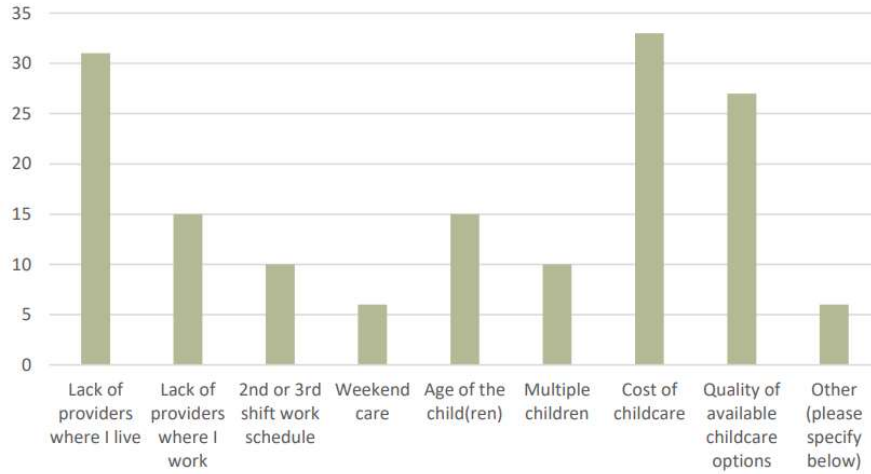
Childcare Gap Report Jackson, Juneau, and Monroe Counties (The Parenting Place)

- Source: *Childcare Gap Report Jackson, Juneau, and Monroe Counties (The Parenting Place)*
- June 2017, a report using data from childcare providers and interviews
- The number of children needing childcare in the three-county area exceeds the existing number of regulated slots by as many as 7,431.
- The number of childcare slots needed in the three-county area exceeds the existing total number of slots (including unregulated care) by as many as 6,533.
- Most parents prefer childcare close to where they live vs. where they work and find it difficult to obtain childcare in these areas.
- The cost of particularly regulated childcare is a burden or even prohibitive for many parents which forces many to seek alternative childcare arrangements for one or more of their children.
- Parents are often less than completely satisfied with the quality of the available care options but need to settle for what is available.
- Childcare options to accommodate rotating work schedules, weekend work, holiday schedules and 2nd and 3rd shift jobs were very limited.
- Parents often commented that they would prefer regulated childcare but were forced to choose unregulated due to available options.

County	Estimated Under 5 Slots Needed ¹	Estimated School Age Slots Needed (age 5-11) ²	Estimated Total Slots Needed	Total Slots Available ³ (Not including Boys & Girls Club)	Gap
Jackson	761	1117	1878	501	1377
Juneau	927	1360	2287	362	1925
Monroe	1810	2657	4467	1236	3231

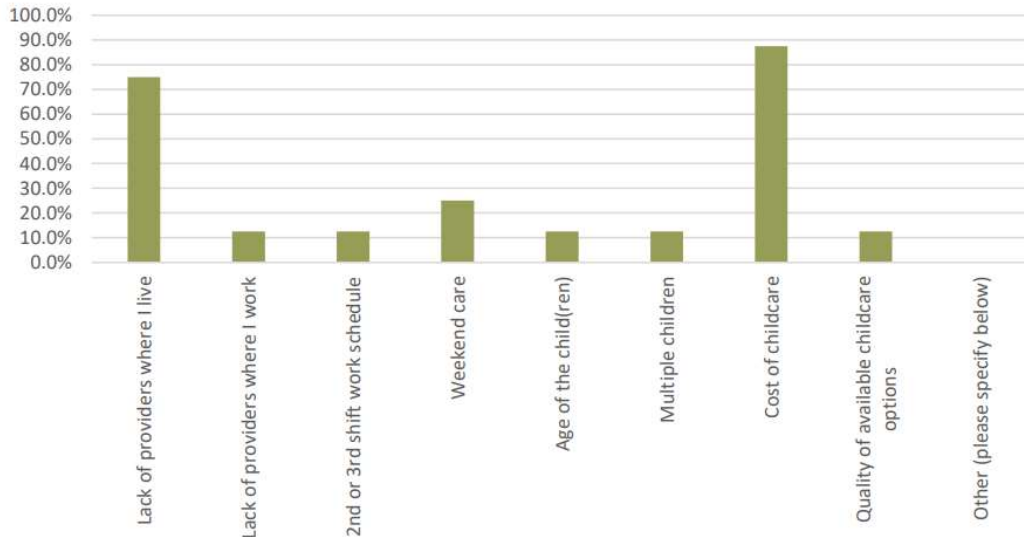
Jackson County

If you are unable to find childcare that fully meets your needs, which of the following have impacted your search?



Juneau County

If you are unable to find childcare that fully meets your needs, which of the following have impacted your search?



Monroe County

If you are unable to find childcare that fully meets your needs, which of the following have impacted your search? (check all that apply)

