



The Child Care Landscape in Onondaga County: A Supply & Demand Analysis

September 2022

Acknowledgements

Funding provided by Onondaga County

This report was possible with the following support:

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Introduction

Access to quality child care during the crucial years from birth to age five helps build the foundation of cognitive and social skills necessary for success in school, personal health, career, and life.¹ Comprehensive studies suggest that high quality early child care leads to greater school readiness, grade retention, academic achievement, high school completion, family stability, employment, higher income, home ownership, reduced health care expenses, and less crime.²

Beyond improving the success of each individual child, access to quality child care has significant economic impact. A 2020 study from the Center for American Progress indicates that a lack of access to affordable child care cost workers an estimated \$9.4 billion in lost wages between 2009 and 2018.³ A 2020 cost of care survey found that 94% of working parents used cost saving strategies in the last year, including reducing hours at work, changing jobs, or leaving the workforce entirely.⁴ This has major

economic implications for our country; due to child care breakdowns, businesses in the United States suffer an economic loss of \$12.7 billion each year.⁵ The importance of early child care and the impact it has on future success highlights the need for quality support systems and educational programs during this critical window. Investments must be made to better support children and improve their long-term quality of life. However, to be most effective, investments in early child care programs need to be data informed.

As communities assess opportunities to strengthen or improve child care there are three key factors to consider: affordability, accessibility, and quality of care. In 2019, the Early Childhood Alliance Onondaga (ECA) and Child Care Solutions contracted with child care expert Grace Reef to identify possible strategies for improving the quality of care in Onondaga County, New York. Reef's data collection and evaluation resulted in a report titled



↓ **Accessibility:** Supply does not meet needs.

↓ **Affordability:** Cost exceeds family's ability to pay.

↓ **Quality:** High quality care is expensive; it depends upon a well-trained and fairly-compensated workforce.

¹ Heckman, J. J. (2012). Invest in early childhood development: Reduce deficits, strengthen the economy. *The Heckman Equation*, 7, 1-2.

² Heckman (2012)

³ <https://www.americanprogress.org/article/rising-cost-inaction-work-family-policies/>

⁴ <https://www.care.com/c/how-much-does-child-care-cost/>

⁵ Child Care Aware of America; The US and the High Price of Child Care, 2019 Report.

Transforming the Early Childhood Landscape in Onondaga County. In the years since the report's release, particularly considering the COVID-19 pandemic, we felt it important to look again at the child care ecosystem in our community – this time with a particular focus on understanding and measuring the supply and demand of child care.

The ECA, Child Care Solutions, and the Onondaga County Department of Social Services - Economic Security commissioned Syracuse University's Maxwell School X Lab and the R/E/D Group to conduct a new and updated comprehensive child care landscape analysis to better understand differential access to early childhood care in Onondaga County. This landscape analysis serves as another layer in gathering and evaluating child care data in Onondaga County, focusing on issues around availability and accessibility.

Over the past few years, the child care landscape has changed dramatically at the local, state, and federal levels. The conditions precipitated by the COVID-19 pandemic have led to historic levels of federal investment being allocated to the states for child care further necessitating the need for a child care landscape analysis. This report was initiated by community leaders to better understand the child care landscape as it currently exists. With the unprecedented level of funding being allocated to states, this report also provides Onondaga County with an opportunity to use this landscape scan to reimagine how child care can be provided and reform access to advance equity. This report seeks to use data-driven information, coupled with discussions and input from the community, to help answer the critical questions around the demand and supply of child care in Onondaga County.

This report utilizes both quantitative and qualitative methods to understand local access and to

contextualize this access data with the stories, preferences, and nuances of local families and providers. The goal of the analysis is to provide a high-level, county-wide overview of the child care landscape, as well as to identify census tracts and zip codes with the largest access gaps in the availability of early child care services. The report also aims to understand the barriers and challenges to access that may exist. This analysis utilizes a framework developed by IFF, a Community Development Financial Institution with significant expertise in analyzing early child care and education landscapes. To accomplish this, demand for child care within the region is compared against the supply of child care in the region, identifying a supply gap. US Census Bureau data from the 2015-2019 American Community Survey 5-Year-Estimates is used to estimate the demand. The licensed child care programs and the available slots per center were obtained using data from Child Care Solutions. Data on child care subsidies was provided by the Onondaga County Department of Social Services - Economic Security. To contextualize the quantitative findings, child care providers and families were interviewed in focus groups to better understand the specific barriers they encountered in utilizing child care. This approach was coupled with a survey targeted towards working parents in Onondaga County, in which they shared their current child care arrangements and accompanying challenges with care.

The findings in this report provide an overview of the child care landscape in Onondaga County based on the most current available data. The aim is to use this knowledge to guide both current and future investments and work toward an equitable child care system that helps support all children in meeting their potential

Understanding the Changing Child Care Landscape – Federal and State Investment

Across the United States, the COVID-19 pandemic pushed child care to the brink and focused attention on a fragmented, under-funded system requiring increased investment to better support children and families. The increasing struggle faced by families, employers, and child care providers has led to near consensus that we need a complete transformation of how we invest in child care throughout the country. These calls for change have resulted in historic infusions of new federal investments in child care through the COVID-19 relief funds and more than \$2 billion in American Rescue Plan funding for New York State.

During the 2022 New York Legislative Session, advocates and legislative champions mobilized in support of New York State advancing a plan for universal access to quality, affordable child care. As recently as April 2022, the State’s child care landscape continued to evolve. In the approved 2022-2023 state budget, the governor and legislature announced a \$7 billion four-year investment toward universal child care. The state budget took significant steps to use federal funds to expand child care subsidies and improve compensation for child care in what will result in a more affordable, higher quality child care system for more working families. Among the approved investments are the following:

- Expanding eligibility for child care subsidies starting August 1st, 2022 from 200% to 300% of the Federal Poverty Level (FPL), meaning an eligible family of four earning up to \$83,250 (\$54,930 for a family of two) will be eligible for

WHAT ARE CHILD CARE SUBSIDIES?

Child care assistance in New York State is governed by the Office of Children and Family Services (OCFS) through the New York State Child Care Assistance Program (CCAP). Assistance is provided through a variety of federal and state funds, with counties providing matching dollars. While some assistance eligibility and payment guidelines are set by OCFS, counties have some flexibility in setting local policies.

Eligibility: This refers to who can participate in child care subsidies, typically by virtue of family income. Eligibility standards are set at a percentage of the (FPL) and vary by household size.

Parent Share: This refers to the portion of the cost of care that each family is responsible for paying toward the cost of child care. This amount is per family, per year (not per child).

Market Rate: This refers to the state-established payment rate for child care subsidies. The market rate is based on a local market rate survey and takes into account the variations in costs of providing child care in different settings. Child care providers are paid at a given percentile of the market rate.

ONONDAGA COUNTY INVESTS IN QUALITY CHILD CARE

Over the past few years, Onondaga County has made progress improving and investing in early child care. The county has faced long-standing challenges of low high school graduation rates and lagging rates of students who can read at grade level. These challenges are especially pronounced among children living in poverty and children of color, as they often do not have access to the same supports and resources as their more affluent counterparts. Collaborative work across numerous government and community partners over the past few years has been oriented around addressing these long-standing challenges.

In 2019, a partnership of Child Care Solutions, the ECA, Onondaga County, the ECA Business Council, and providers of child care in Onondaga County worked together to better understand barriers and opportunities related to accessing high-quality child care. Building on several recommendations in the *Transforming the Early Childhood Landscape in Onondaga County* report, Child Care Solutions, the ECA, and Onondaga County created a pilot initiative to test ways to increase quality in the local child care system.

The Child Care Quality Improvement Pilot began in January 2020, with the county providing funds for a three-year quality improvement project with three child care centers and ten family child care homes. The participants received a high-quality curriculum, training and intensive coaching, and stipends to increase pay. Despite the impact of the pandemic, the pilot resulted in improved quality of care and reduced staff turnover. While the pilot program has not been scaled up yet, the success of the program suggests key investments can help improve the local child care landscape.

assistance to pay for child care. This increase stands to make tens of thousands of New York families newly eligible for child care assistance.

- Capping copays for families with income less than 300% of the federal poverty level at 10% of income over the federal poverty level. This means a family of four with income at 300% of the FPL would pay no more than \$5,550 annually for child care; a family of two, no more than \$3,662.
- Increasing the market rate, used as a basis for provider reimbursement, from the 69th to the 80th percentile.
- Investing \$343 million to continue stabilization funds for child care providers, with 75% of the funds to be used for “workforce initiatives.

The increased federal funding the State allocated to Onondaga County enabled County Executive Ryan McMahon to reduce parent share contributions over the past two years from 35% to 1% of families income over the poverty level. In addition, New York is using funds to invest in expanding the supply of child care and stabilize the workforce.

Finally, over the past two years, New York has also invested in the QUALITYstarsNY program, New York’s Quality Rating and Improvement System (QRIS) for early childhood programs. The program provides support and resources to improve and sustain high quality child care across the state. In previous years, the QUALITYstarsNY program operated with limited capacity in the Central New York (CNY) region, thus limiting the number of participants in Onondaga County (24 programs in the CNY region and 14 in Onondaga County). By leveraging a variety of funding sources including the base state allocation, American Rescue Plan Act funds, and private grants, QUALITYstarsNY proposes to expand the number of programs in the CNY region to 164 by the end of 2023.

Summary Chart of New York State Investment in 2022 and 2023 State Budgets⁶

	FY 2022	FY 2023 Enacted Budget
Total Investment in Child Care (excluding re-programmed funds from prior years)	\$1.154B	\$1.3B
Subsidy expansion	200% FPL for 3 fiscal years	300% FPL and at or below 85% State Median Income beginning August 1, 2022 (no mention of duration)
Co-pays	Limits family co-pays to 10% of income over FPL for 3 fiscal years	Limits family co-pays to 10% of income over FPL (no mention of duration)
Work/immigration status requirements	Child must meet immigration requirements and families must engage in work or educational activities	No change
Age of eligible children	6 weeks through 12 years	No change
Payment for absences	Covers costs for up to 24 absences per year per child for 4 fiscal years (SFY 2021, 2022, 2023, 2024)	Covers costs for up to 24 absences per year per child for SFY 2021 and 2022
Subsidy reimbursement rates	69th percentile of market rate	80 th percentile – Beginning June 1, 2022
Stabilization grants	\$1.26B from federal ARPA stimulus funds-paid up front for a variety of costs, including wage supports, PPE, rent, facility costs, supplies, related to the COVID-19 pandemic. During FY 2022 approximately \$901M of these funds were paid out.	\$343M – reprogrammed funds available for “a second round of stabilization grants, at least 75 percent of which must be used for workforce initiatives.”
Subsidy funding	\$832M (baseline) plus approx. \$828M from federal stimulus funds to: expand subsidy eligibility to 200% FPL for 3 fiscal years (\$225M); cap co-pays at 10% of income over FPL for 3 fiscal years (\$192M); extend subsidy certification to 12 months for 3 fiscal years (\$291M); cover 24 child care absences per child per year for 4 fiscal years (\$120M) <i>*Many of the stimulus funds were not spent in FY 2021 due in part to implementation delays.</i>	\$894.4M (baseline) plus \$670M to expand subsidy eligibility to 300% of FPL; increase subsidy rate to the 80 th percentile of the market rate; cap co-pays at 10% of income over FPL; continue 12-month eligibility for subsidies; cover 24 absences per child per year for SFY 2021 and 2022.
Infrastructure	None	\$50M for infrastructure expansion

⁶ **While this chart represents statewide investments and policies, some implementation decisions are left to the discretion of individual counties. For example, Onondaga County did not choose to pay for absences prior to the enactment of the Pandemic Child Care Waivers and FY23 Budget. Source: Schuyler Center Last Look at the 2022-2023 State Budget*

Looking Ahead

The historic levels of federal investment in child care have provided a sense of urgency to the ECA and our partners to analyze and understand the changing landscape of child care in Onondaga County to ensure that the new funding is targeted toward addressing gaps in access and the needs of parents and providers. The changing landscape provides the community with an opportunity to reimagine how child care is currently being provided and think strategically about how to address the three key factors of accessibility, affordability, and quality.

Key Takeaways

This report provides our community with an updated baseline on the supply, demand, and challenges around accessing child care for families in Onondaga County. This report also serves as a confirmation of many things we assumed to be true (e.g., the supply of care does not adequately serve potential demand, the cost of care is an overwhelming concern to families, and child care providers are struggling to attract and retain their workforce). Perhaps most importantly, this study allowed us to contextualize our findings by hearing directly from parents and providers navigating the child care system.

As funding for child care continues to be more readily available, and as both the state and federal governments continue to shift the child care policy landscape, it is critical that our community strategies for improving the quality of, affordability of, and access to child care are informed by this research. As such, five key takeaways arose from this research, the previous 2019 *Transforming the Early Childhood Landscape in Onondaga County to Promote School Readiness* report, and the changing policy landscape in New York State. In the following section, for each of these five takeaways, we answer the questions:

What did the data tell us?

This section illustrates what we learned in our research.

Why does it matter?

This section contextualizes our research within the broader ecosystem and highlights the implications of the data.

Where do we go from here?

This section considers how we operationalize what we have learned in this study by offering a set of possible strategies.

1. Key Takeaway: Access

What did the data tell us?

In the last two years, the number of child care slots in Onondaga County dropped by 27%; in 2019, there was a supply gap of 8,574 child care slots and in 2021, that gap grew to 12,123. Not only does this represent a 27% increase in the gap between supply and demand, but this figure represents total possible capacity, not the actual system capacity. Given current workforce and staffing constraints, many programs are operating under their licensed capacity of the number of children they serve. Thus, our estimate of supply is not representative of actual supply and instead provides a total of what capacity could be in ideal circumstances. We neither have enough licensed slots to meet demand, nor do we have the staffing capacity to have all licensed slots open for enrollment; our community is woefully undersupplied in child care slots.

Additionally, beyond licensed slots and real-time capacity at each child care facility, many parents told us that they are stuck waiting for child care slots to open. This is particularly true for infant care, as state ratios dictate a low infant-to-teacher ratio, thus limiting the availability of infant care slots. The high ratios needed for infant care create challenges for providers by both increasing operating costs (cost per child increases) and by requiring providers to meet high staffing requirements and overhead costs.

Why does it matter?

When there is not an adequate supply of child care slots available in a community, parents must prioritize accessing child care, often adapting their work schedule to accommodate the available care. Often

this means leaving the workforce to find care. Implications from this decision rollover into all industries and have a ripple effect on the economy. Those families who are unable to stay home and care for their children are often forced to take the type of care they can find, regardless of quality or family preference. This decision undermines the importance of high-quality early education by insinuating that all child care – regardless of quality – is equal or acceptable. This is untrue; quality child care is an educational experience in which providers offer an environment that is both safe as well as one that invests in the early learning and development of each child. This is fundamentally different than a ‘babysitting’ model in which the singular objective of care is to provide a safe environment, regardless of developmental or educational experiences. When families do not have access to quality, affordable child care they often must place their children in care environments that operate on this ‘babysitting’ model.

Where do we go from here?

Increasing supply across all provider types and systems allows for more licensed slots in Onondaga County and offers families the ability to make choices that align with their individual needs and preferences. This can be done by:

- Stabilizing the workforce such that each provider can fully staff up and operate at full licensed capacity. Activities that support this goal include building a workforce career ladder, exploring an apprenticeship model, and developing a shared substitute teacher pool.
- Expanding current operations to increase the number of licensed slots each provider offers to the public. This could include both physically expanding buildings to create space for additional classrooms as well as expanding hours of care to nights/weekends.

- Leveraging incentives such as the New York State Child Care Deserts funding to encourage and mobilize the community to open new home-based and center-based facilities.

2. Key Takeaway: Affordability

What did the data tell us?

The cost of care is prohibitive for many families, and for those who can afford care, is a significant financial burden. In Onondaga County, the average cost of care for a family with an infant and a toddler is \$24,336. For a two-parent family earning the median income of \$61,359, this means that 40% of household income would be spent on child care. Fortunately, Onondaga County is able to provide child care subsidies for families that earn up to 300% of the FPL (effective August 2022). These subsidies cover the entirety of the cost of care for the lowest income families. For the others, family share (the amount a family is responsible for paying under this county subsidy model) is capped at 1% (effective March 2022). A family of four earning up to \$76,313 would be required to contribute a maximum of \$485.63/year per household (not per child).

Unfortunately, our research indicates that historically families have not taken advantage of these subsidies, and the number of families who utilized subsidy support decreased 59% over the last 6 years. In 2015, Onondaga County DSS-ES provided 5,528 families with child care subsidies; in 2021, that number dropped to 2,265. This decrease in utilization is not a result of decreased eligibility; there are an estimated 11,823 children in Onondaga County that comprise the maximum potential demand for child care (using the 300% FPL eligibility criteria). This means that only 19% of the families that are eligible for subsidized care are taking advantage of this public benefit. This

means that the families of approximately 9,558 children in Onondaga County are not accessing the child care subsidies for which they are eligible. The poor uptake in subsidy usage can be attributed to several factors, such as: a lack of awareness around eligibility; stigma associated with utilizing public resources; and the previously high parent share. At the time of our data collection, parent share for families receiving child care subsidies was capped at 35%. This meant that for many families, even subsidized care was unaffordable.

Why does it matter?

By far the biggest concern for all families who participated in the focus groups or in the survey was the cost of child care. This included families who were already receiving child care subsidies. This trend was echoed by providers when asked to speak to the biggest challenges faced by the families they serve. Unfortunately, our data also tells us that there are thousands of families in Onondaga County who are not utilizing the child care subsidies that are available and thus are either not using child care at all or paying more for child care than they need to.

When families cannot afford child care, they make decisions that impact their own families, as well as the rest of our economy and workforce. Families in our study shared stories of choosing not to work because they were concerned that the cost of care didn't make it worth it. For many, the high cost of care meant that families needed to sacrifice quality for what was affordable. Those already using subsidies discussed staying in lower-paying jobs that kept them in an eligible range for subsidies for fear of earning at a rate that would eliminate their subsidy eligibility.

The cost of care is problematic for nearly all families, but the potential solutions vary for different subsets of the population. First, it is important to ensure that

all families who are eligible for child care subsidies are aware of their existence and feel supported in applying for this benefit. We have thousands of families who are either unaware of their eligibility or express concerns that they will be shamed/judged for utilizing a public benefit. Second, for families who are receiving subsidies but are afraid to earn a higher income and no longer qualify for the subsidy system, it is important that we continue to raise the subsidy eligibility to higher income levels. This would also be important for the thousands of middle-income families who are not eligible for subsidies but who still struggle to pay for child care.

Where do we go from here?

- Advocate for an increase in the subsidy eligibility guidelines to increase eligibility levels beyond 300% FPL.
- Create a public awareness campaign highlighting the recent expanded eligibility and affordability of child care subsidies.
- Normalize and destigmatize the usage of subsidies, particularly in suburban and rural communities.
- Develop strategies to encourage all child care providers to accept child care subsidies.
- Pilot business-backed strategies to subsidize the cost of care for employees, such as employer-subsidized child care slots at nearby child care centers.

3. Key Takeaway: Quality

What did the data tell us?

In this study, we did not take quality of care into account, instead focusing solely on accessibility. This is largely because we do not have enough information on the quality of care offered at child care sites to provide a comprehensive assessment. QUALITYstarsNY, the New York State funded Quality

Rating and Improvement System, operated with flat funding for many years. Only 14 programs in Onondaga County participated in 2020 which is not enough data for QUALITYstarsNY to report an aggregate quality score for the region.

In the 2019 report, *Transforming the Early Childhood Landscape in Onondaga County to Promote School Readiness*, we learned the average Onondaga County school district spends an average of \$22,217 per pupil per year. In comparison, subsidy payments for children in child care range from \$9,620 to \$14,560 per child per year (depending on child age and care setting). Other typical markers of quality care are missing in Onondaga County, as well: staff turnover is high (35.4% of daycare center directors reported lead teacher turnover of 10% or more) and wages are low (an average wage of \$14/hour or \$29,907/year).

Despite our lack of systematic data related to child care quality, in this study, parents shared that the quality of care was a top concern, particularly among those who are not receiving subsidies. This tells us that for the families who can afford to pay for care, quality is a top priority. This does not mean that families receiving subsidized care do not care about quality but could suggest that they are more focused on finding available and affordable care.

Why does it matter?

Quality early childhood support and care improves the odds of success for various stages of a child's life, including academic performance, physical health, better social and working relationships, and higher

earnings, leading to a 13% per year return on investment in child care.⁷

Not only do we know that the quality of care provided influences long term outcomes for each child, but we also know that quality of care is of deep importance to parents and providers. While we know that quality is a crucial factor in considering child care, as a community we do not yet have a full understanding of the strengths and gaps in the quality of our local providers. This is because we do not yet systematically measure quality; this kind of data collection takes place in conjunction with quality improvement programs such as QUALITYstarsNY and the ECA's and Child Care Solution's locally funded Child Care Quality Improvement (CCQI) pilot initiative. In 2021, New York State deepened their investment in the QUALITYstarsNY system, enhancing system capacity. By the end of 2023, the expanded QUALITYstarsNY program has a goal of serving a total of 164 programs in the CNY region. At a local level, it is incumbent upon our community to fully leverage this opportunity and get as many programs in Onondaga County into QualitystarsNY as possible. As the first cycle of the CCQI pilot comes to a completion at the end of 2022, there is an opportunity to continue this program and expand it to serve more providers.

Where do we go from here?

- Increase the number of Onondaga County child care programs participating in QUALITYstarsNY, especially encouraging this support for programs that serve a high percentage of children accessing child care subsidies.

⁷ Heckman, J. J. (2008). Schools, skills, and synapses. *Economic inquiry*, 46(3), 289-324; Heckman (2012); Heckman, J., Pinto, R., & Savelyev, P. (2013). Understanding the mechanisms through which an influential early childhood program boosted adult outcomes. *American Economic Review*, 103(6), 2052-86;

Schweinhart, L. J. (2013). Long-term follow-up of a preschool experiment. *Journal of Experimental Criminology*, 9(4), 389-409.

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- Expand the CCQI pilot program to support more providers in the next cycle of funding.
 - Strengthen linkages between existing programs that enhance the quality of care (e.g., CCQI, ParentChild+, QUALITYstarsNY).
 - Advocate for increased pay to attract and retain a qualified, adequately compensated workforce that is able to deliver high-quality child care.

4. Key Takeaway: Capacity

What did the data tell us?

When we asked providers to identify the greatest challenge that they are facing, staffing concerns rose to the top of the list. While we do not have data on the real-time capacity of child care providers (this data is not systematically collected), we know from our focus groups with providers that many of them are operating under capacity. For day care centers, this means that many facilities are not utilizing all the slots that they are licensed to operate: many classrooms are closed. Underutilization is due to staffing shortages in which administrators cannot maintain an adequate level of staffing to open all classrooms while remaining compliant with state regulations.

Administrators struggle to find appropriately educated and credentialed teachers who are interested in these under-paid, high-responsibility positions. Beyond finding possible interviewees, the state-mandated onboarding process can take so long that interested staff have already found other positions by the time they are cleared to start working. For home-based providers, staffing issues surface in other ways, most notably the lack of substitutes who can step in when a provider needs to go to a doctor's appointment or take a day off. Home-based providers also noted the desire to hire assistant staff members but, like day care centers,

struggled to find quality people who were interested in these low-paying positions.

While staffing was the overarching concern, both center-based and home-based providers struggle more broadly with a lack of administrative supports and capacity. For day care centers, this includes needing assistance with COVID-19 related protocols, coordinating service delivery, and human resources concerns. For home-based providers, capacity concerns often related to their own physical environment (i.e., needing funding to repair/expand their home to accommodate the daycare or a desire to relocate to safer neighborhoods to put families at ease).

Why does it matter?

We already knew that we do not have enough supply to meet demand in Onondaga County, but we also now know that the providers we do have are struggling to operate at full capacity. This impacts not only the number of children that each provider can care for, but also contributes to systemic turnover and staff burnout which in turn impacts the quality of care that providers can offer children.

While they may not always think of themselves as such, child care providers are small business owners. The resources that typically provide technical assistance and support to small business owners are not equipped to work with the nuance and complexity of child care businesses. The broader policy and context underlying the child care system prevents an investment in internal capacity for providers. Providers in our community do not have access to adequate staffing, funding to invest in necessary capital improvements, and an inability to charge the actual cost of care. Ultimately, restricted capacity surfaces in the community through low wages, workforce turnover leading to worse care, and limited care options for families.

Where do we go from here?

- Create a fund to support capital improvements and/or program expansion.
- Build a workforce pipeline that builds interest in early childhood education.
- Expand programs and build capacity for the agencies and programs that support providers (such as Child Care Solutions and the Early Childhood Career Pathways Program at PEACE, Inc.) with small business coaching and more.
- Advocate for subsidy rates to be set at the true cost of care, instead of current policy that utilizes market rate. While the market rate will increase from the 65th percentile to 80th percentile in June 2022, this is still not an adequate pay rate for providers.

5. Key Takeaway: Family preference

What did the data tell us?

Not only do we not have enough child care, but the hours of care are often misaligned with what families want and need. This is particularly true for early morning care and second shift/night work care. In addition, there are many families who need part-time care on a flexible basis but struggle to find a provider that can accommodate this style of work. We heard from parents that child care is a determining factor for employment selection – the location, hours, and availability of care dictates the working hours for parents who then must find employment that operates within those hours of coverage.

We surveyed parents and asked them what their top challenges with child care are. One of the top concerns was that “child care is not open when I need it.” This was echoed by providers when asked what challenges they see on behalf of the families they serve. In addition, many families indicated that the type of care that they are utilizing is not necessarily

the type of care that they would choose if barriers did not exist. Families receiving child care subsidies are limited to providers who will accept their subsidy payment. Many respondents indicated that their current child care arrangement relies on unlicensed and unregulated friends and family, but that they desire to utilize public pre-K programs, Head Start, and Early Head Start programs. As we consider strategies to improve access to child care, it is important to note that 20% of families surveyed (echoed by families interviewed in our focus groups) wished to stay home with their children, particularly until children are old enough to speak.

Why does it matter?

Unlike the K-12 system, which is both universally mandated and subsidized, families of children under the age of 5 are presumed to have a great deal of choice and preference when using child care. Our research reminds us that families have very different desires and sensibilities when designing their ideal care. Family preference is as complex as the families served; it is individual and based on culture, experience, and family circumstance. However, the term ‘preference’ implies a choice. When families are income restricted, they do not have the luxury of choosing between multiple types of child care. Instead, they are restricted to whichever option they can both access (e.g., hours of care that meet family need, locations within walking distance or located near public transportation) and afford (willing to accept child care subsidies). Choosing care based on quality is a luxury that they literally cannot afford to make.

Where do we go from here?

Family preference begins with prioritizing inequities; increasing affordability and access is critical to providing choice. To equitably fund the system, we must first satisfy access and affordability; only then can we focus on quality and truly accommodating family preference.

- Prioritize efforts which maximize access and increase the supply of affordable child care. With increased supply comes increased availability for families to choose the type of care they desire.
- Advocate at the state and federal level for increased funding for child care that matches the level of funding that public education receives.

TYPES OF CHILD CARE

*Child Day Care Center (DCC)*⁴: Day care centers care for children in groups. Care is provided by multiple caregivers and occurs in a facility separate from a residence. Children are aged six weeks old through 12 years old and typically divided by age group.

*Family Child Care Home (FCC)*⁵: A registered family child care home may care for up to eight children from six weeks old through 12 years old. There must be one caregiver present for every two children less than two years of age.

*Group Family Child Care Home (GFDC)*⁶: A licensed group family child care home may care for up to 16 children from six weeks old through 12 years old. There must be one caregiver present for every two children less than two years of age. Two caregivers must be present when more than six children are present.

Legally Exempt Care (LE): New York State allows families with children whose care is paid for with a child care subsidy to choose to use that subsidy in unlicensed care. These unlicensed providers generally care for fewer than three children, can be relatives or non-relatives, and can care for children in the provider's home or in the home of the family whose children need care.

Head Start/Early Head Start (HS/EHS): Head Start and Early Head Start are federal programs that were established to promote and improve the school readiness and long-term educational outcomes of children from birth to age five from low-income families. These programs aim to provide supportive learning environments to children from low-income families that allows them to enhance their cognitive, social, and emotional development. EHS serves children from birth through two years of age, while HS serves children from three to five years of age. To be eligible, a child's family income must be below 200% FPL.

Universal Pre-Kindergarten (UPK): Universal Pre-K provides publicly funded pre-kindergarten care and education programs operated by local school districts. Districts can either choose to operate programs in school buildings, with community-based organizations, or a combination of both.

Methods and Data Collection

Quantitative Analysis

This study uses a supply and demand estimation framework to understand access to child care among families with children aged zero through five and identify the areas in Onondaga County with the greatest unmet needs for child care. In this report, gaps in access are calculated by comparing the supply, which is the capacity of licensed child care providers, universal pre-K slots, and legally exempt subsidized care, against demand, which is the number of children living in households with all parents in the workforce. The supply, demand, and access gap framework used in this report is based on a methodology developed by IFF, a Community Development Financial Institution.

To estimate supply, the Maxwell X Lab at Syracuse University (X Lab) combined datasets from Child Care Solutions, Onondaga County DSS-ES, and the Onondaga County school districts to create the most comprehensive listing of available providers. This data includes estimates of formal, regulated, licensed, and unlicensed providers with seating capacity for child day care centers, family child care, group family day care, school age child care, universal pre-k (half day and full day), legally exempt relative care, legally exempt non-relative care, and legally exempt group child care.

To estimate demand, the X Lab utilized 5-year population estimates from the 2015-2019 American Community Survey (ACS). Demand is defined as the number of children aged zero to five who live in a two-parent home where both parents are in the labor force or a single-parent home where the single

parent is participating in the labor force. The supply gap is the number of available slots for child care subtracted from the maximum potential demand for child care. Estimates are calculated for Onondaga County as a whole and at the census tract and zip code level.

In addition to measuring overall demand and supply estimates for child care, the report also considers the demand for and provision of the state subsidy program. Appendix 1 includes a detailed breakdown of the calculation of state subsidy program demand. The X Lab estimated the maximum potential number of families eligible for subsidized care as the percentage of children living in households below 275% FPL (the maximum income eligibility level in Onondaga County at the time of data collection) multiplied by the overall demand for child care services. Onondaga County DSS-ES supplied estimates of the total number of subsidies provided to families. Using this information, the subsidy supply gap is the difference between the maximum number of families eligible for and with a potential demand for subsidized child care compared to the number of subsidies provided to families. On August 1st, 2022 the eligibility criteria for child care subsidies was expanded to 300% FPL. To understand how this increase stands to change the demand and supply gap of subsidized child care, the X Lab also estimates the subsidy supply gap at 300% FPL using 2021 data.

It is important to note that the methodology and approach for estimating supply and demand is complicated by several factors. To make this analysis

⁸ <https://ocfs.ny.gov/programs/childcare/regulations/413-Definitions.pdf>

⁹ <https://ocfs.ny.gov/programs/childcare/regulations/417-FDC.pdf>

¹⁰ <https://ocfs.ny.gov/programs/childcare/regulations/416-GFDC.pdf>

tractable, the following key assumptions were made:

- One of the primary challenges is the limited data on parental preference for child care. The number of parents who choose to remain home with their children is unknown as is how many children receive private forms of child care (i.e., from relatives, neighbors, friends, nannies, au-pairs, or other forms of child care that are not subject to government regulation).
 - To address this limitation, the X Lab followed common practice using the maximum potential demand for child care within the county. We assume that any child living in a household in which all the parents participate in the workforce will need child care.
- Another key challenge in the demand calculation is the lack of data on the location of demanded child care.
 - To address this limitation, the X Lab assumed that a family's residential location is the place where they demand child care services. This distinction is important, as it is often the case that parents prefer child care services on the route to their workplace or close to their workplace to better respond to emergencies at the daycare, and this preferred location may be some distance from their residence. However, we do not know the proportion of parents who demand child care close to their workplace, and, therefore, cannot incorporate that information into the demand estimate.
- On the supply side, the data on licensed and regulated providers is limited; there is no way of tracking private forms of child care outside of subsidies (e.g., neighbors, family, friends, au-pairs, etc.). The supply data utilized is, therefore,

an undercount of the true level of child care being provided in the county. All supply gap calculations, therefore, are upper-bound estimates of the possible access gaps.

- As noted earlier, the supply capacity does not indicate the number of seats utilized throughout the year, but provides the maximum potential supply of early child care if every location were enrolled at full capacity
- Finally, there is no data on the quality of child care provided in the county.

In response to these data limitations, this analysis relied heavily on numerous local child care experts, facilitators, and practitioners that could provide much needed guidance and data support. Information on licensed providers, from centers to group homes, was provided by Child Care Solutions. Data included the total seating capacity for child day care centers, family child care, group family day care, and school age day care. From anecdotal evidence, we know that the number of seats utilized changed significantly from previous years once the pandemic hit. Using the realized slots for child care capacity would not adequately capture the potential for supply within the region. To supplement this, we also worked with the ECA and Onondaga County school districts to get data on the existing slots for universal pre-k (half day and full day schedules). Finally, we were able to capture the supply of legally exempt relative care, non-relative care, and group child care through the Onondaga County Department of Social Services - Economic Security. The data they provided included the number of subsidies allotted each year to those varying types of care. This data does not allow one to capture the supply of informal early child care providers such as relatives, neighbors, friends or privately hired nannies or au pairs who did not apply for subsidies and reimbursement.

Throughout the process, the methods, assumptions, and estimates underlying the supply and demand analysis were shared with the community partners and screened and discussed for completeness and accuracy. It is important to emphasize that the estimates provided in this report are based on the best available data on the demand and supply of early child care in Onondaga County, but they do not capture the complete picture of the child care landscape. This report provides a snapshot of the child care landscape based on the existing data and has established a conceptual framework for analyzing supply, demand, and access gaps that can be reused in the future as more complete data is collected and the situation on the ground changes. We highlight through the report that additional data is needed and that conducting ongoing analysis when new data is available will be of critical importance moving forward.

Qualitative Analysis

To contextualize the hard data collected during the quantitative landscape scan, we felt it important to speak directly with parents and providers in Onondaga County. The R/E/D Group developed a layered approach in which families had opportunities to participate in the research with either a short, light touch approach via an electronic survey or a more intensive focus group. There were four distinct categories of individuals whose feedback was solicited: family child care (FCC) and group family day care (GFDC) providers, day care center administrators, parents of children up to age five who live in the City of Syracuse, and parents of children up to age five who live in Onondaga County.

These focus groups were held over the course of several weeks in February and March 2022. With the exception of the City of Syracuse family focus

groups, all focus groups were held virtually over Zoom. The decision to hold the majority of the focus groups virtually was made in light of a surge in the COVID-19 pandemic and to decrease barriers to participation. For example, many families joined the focus groups with their children in tow or during naptime/bedtime.

In addition, the R/E/D Group conducted a county-wide survey for parents of children under the age of five. The survey particularly focused on reaching working parents, with the understanding that there are distinct differences in the preferences, challenges, and attitudes toward child care based on the socio-economic status of different families. The 11-question survey was administered digitally and anonymously (see appendix for survey and focus group results.)

Quantitative Results

Estimates of Supply of Child Care

Onondaga County Supply of Child Care

Key Findings:

- In 2021, there were 398 formal and regulated early child care programs serving infants, toddlers, and preschoolers (aged zero to five), resulting in an estimated seating capacity supply of 8,866.
- In 2019, there were 438 formal and regulated early child care programs serving infants, toddlers, and preschoolers (aged zero to five), resulting in an estimated seating capacity supply of 11,466.

- There was a significant decrease in total capacity from 2019 to 2021 of 3,549 or around 27%.
- Across Onondaga County, there is a concentration of providers and available seats in the towns/cities of Onondaga, Syracuse, Dewitt, Clay, Lysander, and Salina.

After combining datasets, there were a total of 9,371 available slots for child care in Onondaga County in 2021. In 2019, there were a total of 12,920 available slots for child care in the county. This amounts to an approximately 27% reduction in available child care slots over the two years. Table 1 and 2 provide a more detailed breakdown of the available slots by provider type and children’s age in 2019 and 2021. Day care centers were the largest providers of child care slots in both years.

Table 1. *Onondaga County Child Care Provider Capacity by Type and Age, 2019.*

Category	Provider Type	No. of Providers	Infants & Toddlers (Age 0-2)	Preschool (Age 3-5)	Total (Age 0-5)
<i>Licensed</i>	Child Day Care Centers (DCC)	83	2,148	3,653	5,801
	Family Child Care (FCC)	189	378	746	1,124
	Group Family Day Care (GFDC)	114	456	908	1,364
	School Age Child Care (SACC)	52	0	22	22
	Universal Pre-K (Half Day)			1,466	1,466
	Universal Pre-K (Full Day)			1,689	1,689
	Total	438	2,982	8,484	11,466
<i>Unlicensed</i>	Legally Exempt Non-Relative Care		222	250	472
	Legally Exempt Relative Care		455	520	975
	Legally Exempt Group Child Care		0	7	7
	Total	0	677	777	1,454

Table 2: Onondaga County Child Care Provider Capacity by Type and Age, 2021.

Category	Provider Type	No. of Providers	Infants & Toddlers (Age 0-2)	Preschool (Age 3-5)	Total (Age 0-5)
<i>Licensed</i>	Child Day Care Centers (DCC)	77	1,975	2,326	4,301
	Family Child Care (FCC)	167	334	659	993
	Group Family Day Care (GFDC)	101	404	802	1,206
	School Age Child Care (SACC)	53	0	22	22
	Universal Pre-K (Half Day)			895	895
	Universal Pre-K (Full Day)			1,449	1,449
	Total	398	2,713	6,153	8,866
<i>Unlicensed</i>	Legally Exempt Non-Relative Care		56	69	125
	Legally Exempt Relative Care		161	219	380
	Legally Exempt Group Child Care		0	0	0
	Total	0	217	288	505

The analysis includes data from Child Care Solutions on provider capacity from 2015 to 2021, but it does not supplement the data in each of those years with the UPK and unlicensed data. Nevertheless, it is still helpful to note how licensed provider capacity has changed over the years. Chart 1 presents data that shows that there was an uptick in the number of available seats and capacity for early child care programs in Onondaga County pre-pandemic. However, during the pandemic, the capacity levels fell drastically. Chart 2 tracks the number of providers by type of program to see if there are types of child care programs that experience changes in capacity over time. The chart suggests that there was a gradual decrease in the number of providers for all types of programs, though the largest drop seems to be driven by a reduction in family child care. However, Chart 2 indicates that the total number of providers did not change that significantly, suggesting that the capacity and available slots within those programs was the factor

behind the drastic reduction in total seats shown in Chart 1.

During the height of the pandemic, some child care providers closed because they experienced significant difficulty keeping children enrolled and staff hired and retained. However, even after the economy re-opened, several child care providers remained closed or operated at a significantly reduced capacity as families pulled their children out of child care for a myriad of reasons: health concerns, working from home, or unemployment. Of potentially greater concern is the number of providers that remain closed or at reduced capacity because of the workforce crisis. Compensation for child care providers and staff is grossly inadequate, and many child care workers do not want to return to their difficult and low paying jobs. Addressing the issue of child care workforce retention is an important step in addressing concerns around capacity.

Chart 1: Child Care Provider Capacity Trends, 2015-2021

PROVIDER CAPACITY TRENDS (2015-2021)

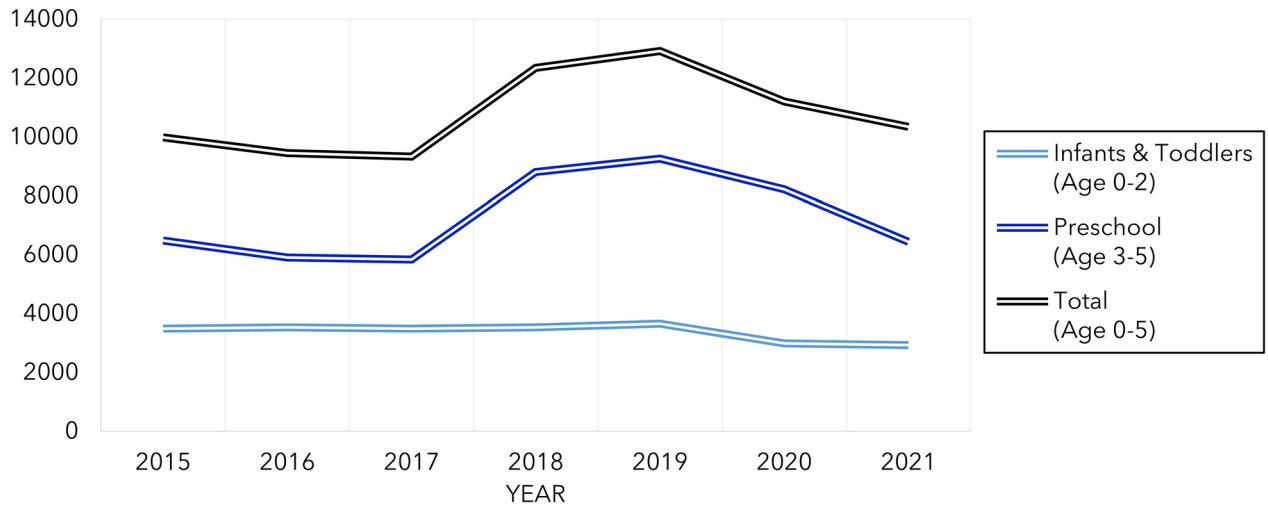
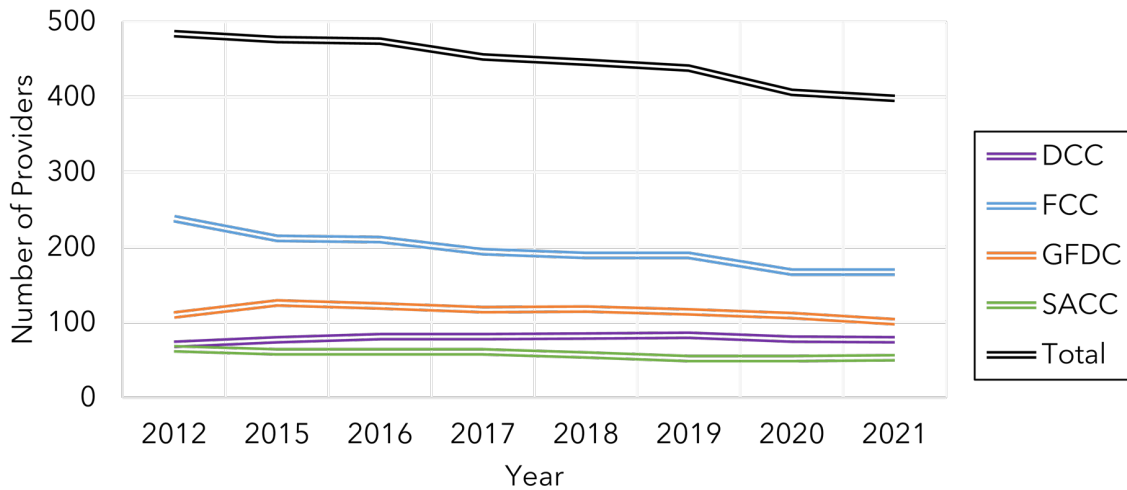


Chart 2: Child Care Number of Provider Trends by Program Type, 2015-2021

NUMBER OF PROVIDERS BY TYPES OF PROGRAM (2015-2021)



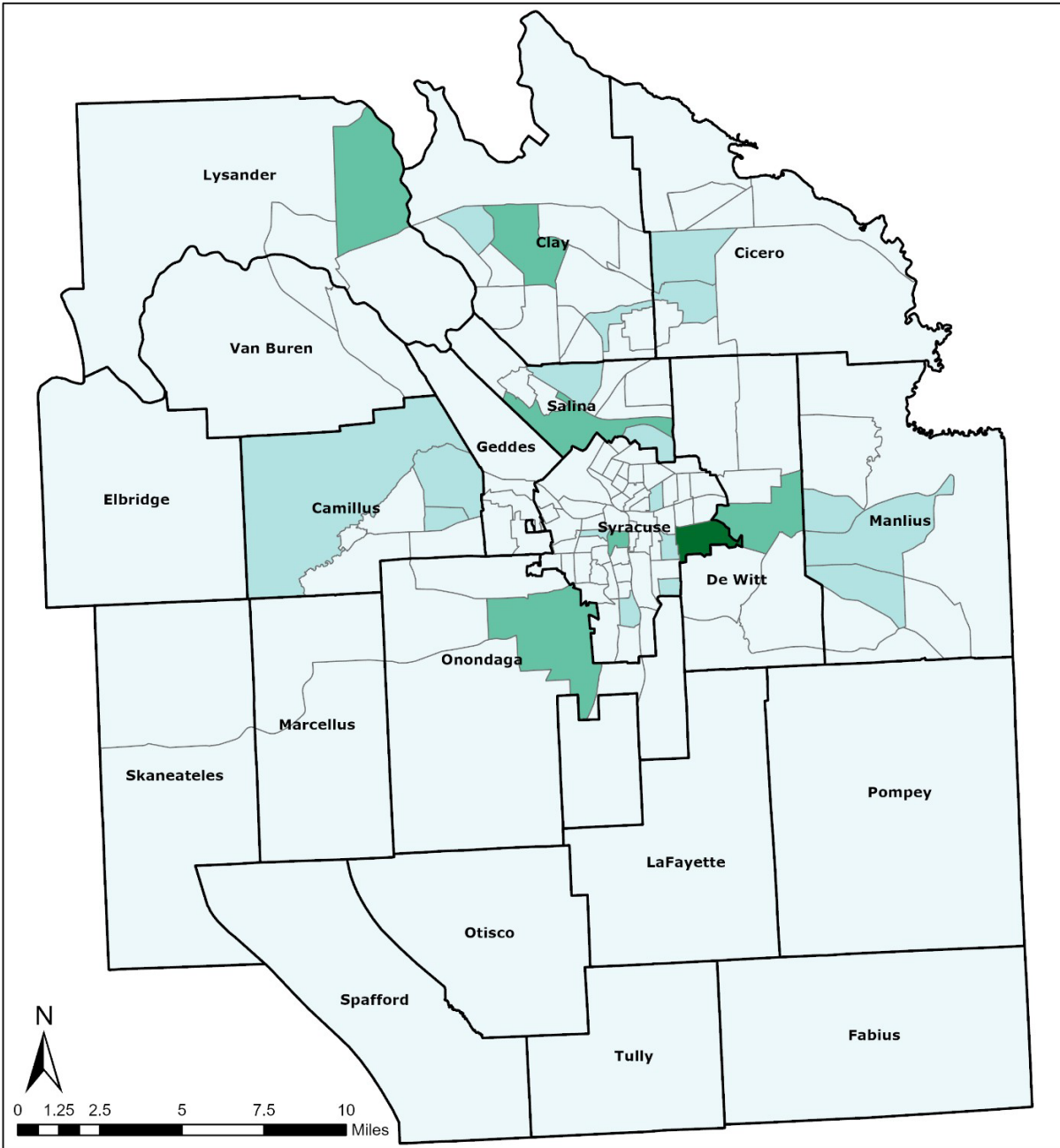
For the spatial analysis, the X Lab mapped out the available seating capacity at the census tract level in Onondaga County. As mentioned earlier, these maps only capture the available slots for licensed providers; there is no information on UPK seats or legally exempt subsidized care at the census tract level. However, the data available is still helpful in allowing one to map the variation across the county in provider capacity. As Map 1 shows, there is a concentration of providers and available seats in the towns of Onondaga, Dewitt, Clay, Lysander, and Salina and in the City of Syracuse. Table 3 shows the

concentration of providers by census tract. This is likely due to business centers and a high density of employers in those areas. It suggests that parents in other towns across the county may have to commute to these towns and the City of Syracuse to find licensed care providers for their children. Given the increased levels of remote work since the beginning of the pandemic, this map may explain why we are seeing declining trends in enrollment. Families may not want to drive to these areas to drop their children off at day care.

Table 3. Top 10 Census Tracts with Highest Number of Licensed Care Slots (Supply), 2021.

Rank	Census Tract	Town/City	Licensed Slots Supply
1	46	Syracuse	484
2	42	Syracuse	290
3	146	De Witt	287
4	163	Onondaga	262
5	112.32	Clay	210
6	114.01	Lysander	203
7	137.01	Salina	202
8	40	Syracuse	183
9	142	Salina	183
10	127	Camillus	177

Map 1: Onondaga County Licensed Child Care Provider Seating Capacity by Census Tract (2021)

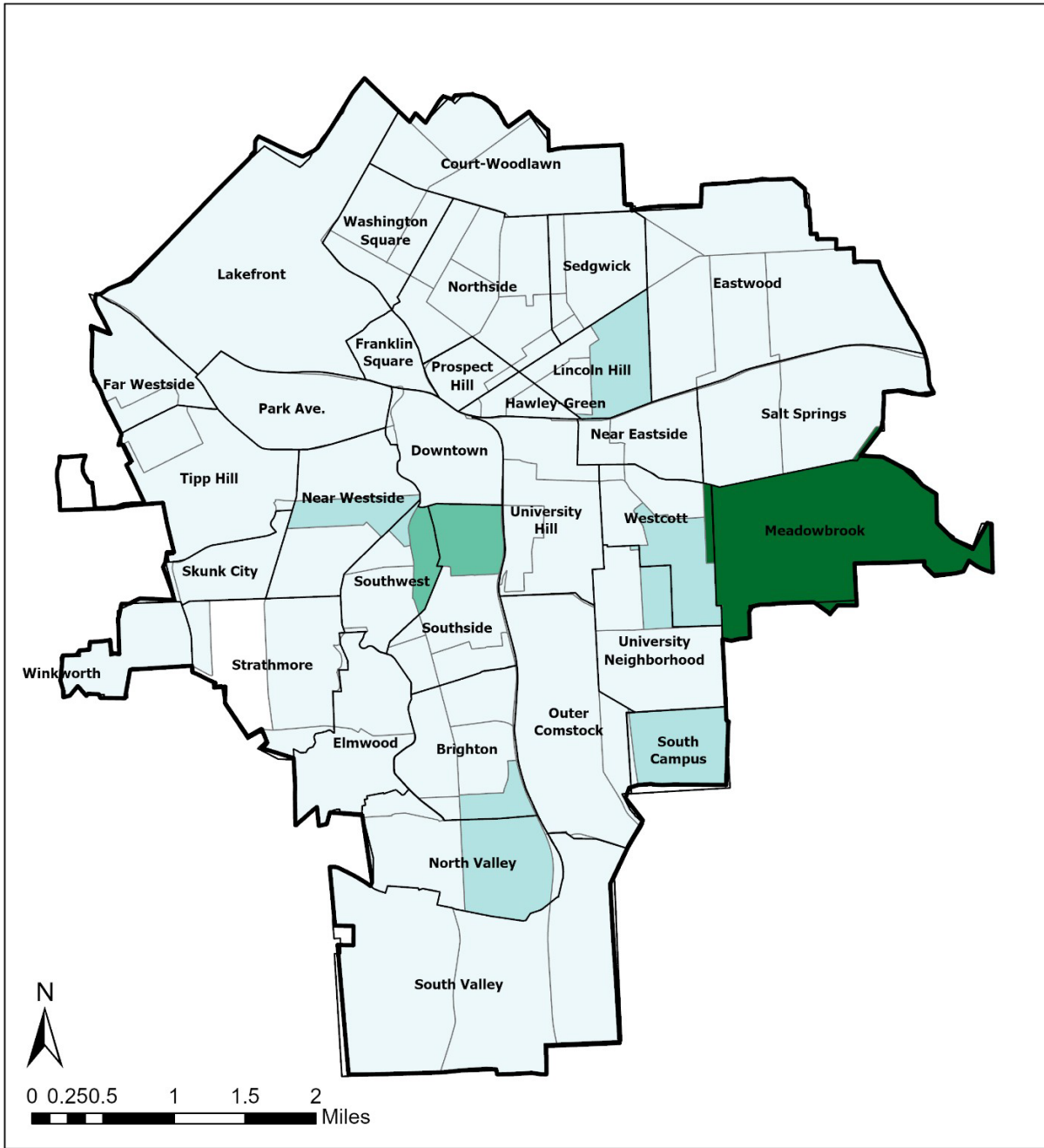


Onondaga County Licensed Child Care Provider Seating Capacity by Census Tract (2021)

Date: 3/21/2022

Legend	
	City/Town Boundaries
Total Seats Available (Pop 0-5 years)	
	0 - 100
	101 - 200
	201 - 300
	301 - 400
	401 - 500

Map 2: Syracuse City Licensed Child Care Provider Seating Capacity by Census Tract (2021)



City of Syracuse Licensed Child Care Provider Seating Capacity by Census Tract (2021)

Date: 3/23/2022

Legend

- City of Syracuse Boundary
- Neighborhood Boundaries

Total Seats Available (Pop 0-5 years)

- 0 - 100
- 101 - 200
- 201 - 300
- 301 - 400
- 401 - 500

Availability and Provision of Subsidized Child Care

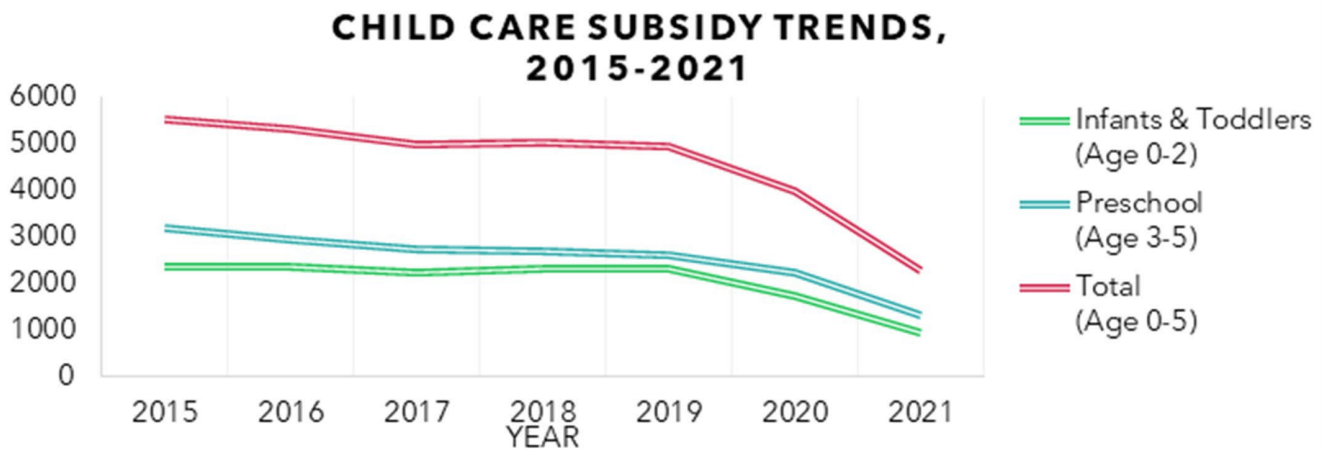
Key Findings:

- In 2015, Onondaga County DSS-ES provided 5,528 families with child care subsidies. In 2021, that dropped to 2,265 families. That amounts to an approximately 59% decrease in the provision of subsidies over the past six years.
- The declining trend may be caused by a great number of parents working from home, health concerns, high unemployment rates, and reduced capacity among providers in response to the pandemic and declining demand for child care.
- In 2020, the number of children enrolled in Early Head Start (EHS) was 302. There were 829 children enrolled in Head Start (HS).
- Since 2017, there have been a steady number of children enrolled in and attending publicly funded pre-K in Onondaga County. However, the total number of children enrolled in UPK fell from 3,277 in 2019-2020 to 2,344 in 2021, a 27% drop.

- There is a considerable gap between the maximum potential demand for EHS and HS programs compared to the number of children enrolled in these programs, suggesting that more funding is needed to expand program capacity and better meet the needs of the population.

Chart 3 shows the number of child care subsidies provided from 2015 to 2021. The chart demonstrates that the provision of subsidies remained relatively stable over the early years. However, there was a steep decrease in the number of subsidies provided once the pandemic began in 2020. In 2015, there were 5,528 subsidies provided to families in need, but that dropped to 2,265 families in 2021. That amounts to an approximately 59% decrease in the provision of subsidies over the past six years. This has occurred for a multitude of reasons, including parents working from home and not wanting to risk putting their children in day care during the pandemic; high unemployment rates reducing the need for child care; and reduced

Chart 3: *Child Care Subsidy Trends, 2015-2021.*



capacity among providers in response to the pandemic and declining demand for child care.

In addition to child care subsidies, children from families whose income is below 200% FPL are eligible for the Early Head Start (EHS) and Head Start (HS) programs. Most of the EHS and HS programs are run by non-profit organizations, schools, and community action agencies. In Onondaga County, PEACE, Inc. and the Salvation Army are two of the largest agencies implementing both programs. Data from these two agencies for their 2020 enrollment rates are shown in Table 4. There are 3,905 children two or younger who live in a household below 200% FPL and are eligible for and likely to need subsidized child care. There are 4,387 children aged three to five who are who live in a household below 200% FPL and are eligible for and demand subsidized child care. In 2020, the number of children enrolled in EHS was 302, and 829 children were enrolled in HS. There is a considerable gap between the maximum potential demand when compared to the number of children enrolled in these programs. The Director of Early Childhood Education Services for the Salvation Army stated that there are waiting lists

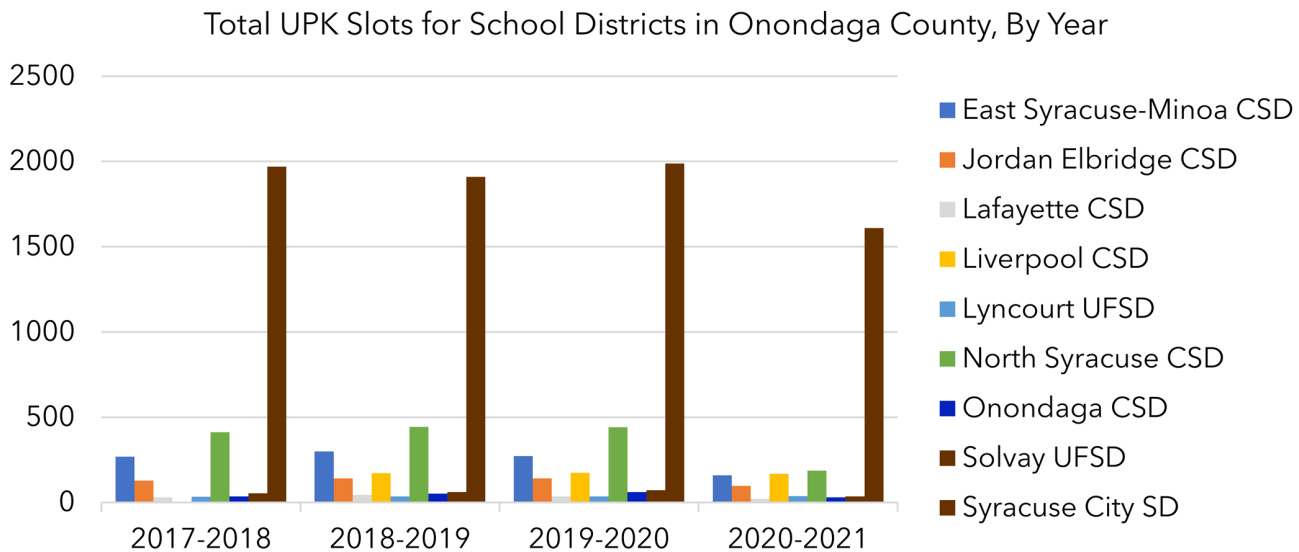
Table 4: *Onondaga County Summary of Early Head Start and Head Start Enrollment, 2020*

Ages	Child Care Demand at 200% FPL	No. of Children Enrolled
Early Head Start (EHS) [Age (0-2)]	3,905	302
Head Start (HS) [Age (3-5)]	4,387	829
Total	8,292	1,131

for the two programs, suggesting that more funding is needed to expand program capacity and better meet the needs of the population.

In Onondaga County, there are several school districts that provide a certain number of slots for UPK. As mentioned, the state allocates funding to school districts for UPK attendance, but historically not all districts were allocated funding for UPK. Chart 4 shows the trend in the number of children attending UPK by school districts in Onondaga County since 2017. The chart shows that there was an uptick in the total number of children attending

Chart 4: Total UPK Slots by School Districts in Onondaga County, 2017-2021.



state funded UPK programs through 2020, but that there has been a small dip since then likely due to the pandemic. The Syracuse school district continues to be the district offering the largest number of children a pre-K program. Of note, New York State is providing expanded and increased funding to all school districts to initiate their own UPK programs. Baldwinsville, Jamesville-Dewitt, Fayetteville-Manlius, and West Genesee have chosen to start offering state-funded UPK programs to their residents.

Onondaga County Demand for Child Care

Key Findings:

- Under the X Lab’s calculation of demand, there are a total of 21,494 children that comprise the maximum potential demand for child care in Onondaga County. There are 10,951 children that live below 275% FPL and also have a potential demand for child care.
- There is significant variation in demand for child care across Onondaga County. The maps highlight that census tracts in Onondaga, Manlius, Pompey, Lysander, Clay, Cicero, Syracuse, and Van Buren have the highest proportion of families potentially demanding child care services.
- The demand and eligibility patterns across the county change when we consider households living below 275% FPL. Under these parameters, Syracuse, Salina, Lysander, Van Buren, Clay, Geddes, and Camillus have census tracts with the highest number of families that are eligible for and have a potential demand for subsidized child care.

Onondaga County has a population of 31,705 children five and younger. After accounting for the employment status of parents and family composition, we estimate that there are a total of 21,494 children that comprise the maximum potential demand for child care in Onondaga County. This is the total number of children living in two-parent households where both parents work and children living in single-parent households where the single parent works. For purposes of calculating demand, we assume that a non-working parent is able to stay at home and care for their children, thus eliminating the need for child care services outside of the home.

After accounting for households living below 275% FPL, table 5 displays our estimate that there are 10,951 children that are eligible for and potentially demand subsidized child care, EHS, and HS.

While we have ACS five-year estimates at the census tract level denoted on the maps, we have also provided an overlay of city/town boundaries. Map 3 provides a spatial overview of the overall demand for child care across the county. Map 4 provides a closer look at the maximum potential level of demand for child care in the City of Syracuse specifically. The map displays the number of families potentially demanding child care in a given census tract within equal size intervals. Table 6 highlights that there are census tracts in Lysander, Clay, Onondaga, Manlius, Pompey, Syracuse, and Cicero that have the highest proportion of families potentially demanding child care services. As noted in our methods section, we are assuming that families living in a particular census tract will demand child care in that census tract itself even though these working parents might commute to work and therefore demand child care in a different location.

Table 5: Onondaga County Max Potential Child Care Demand Summary, ACS 2015-2019 Estimates

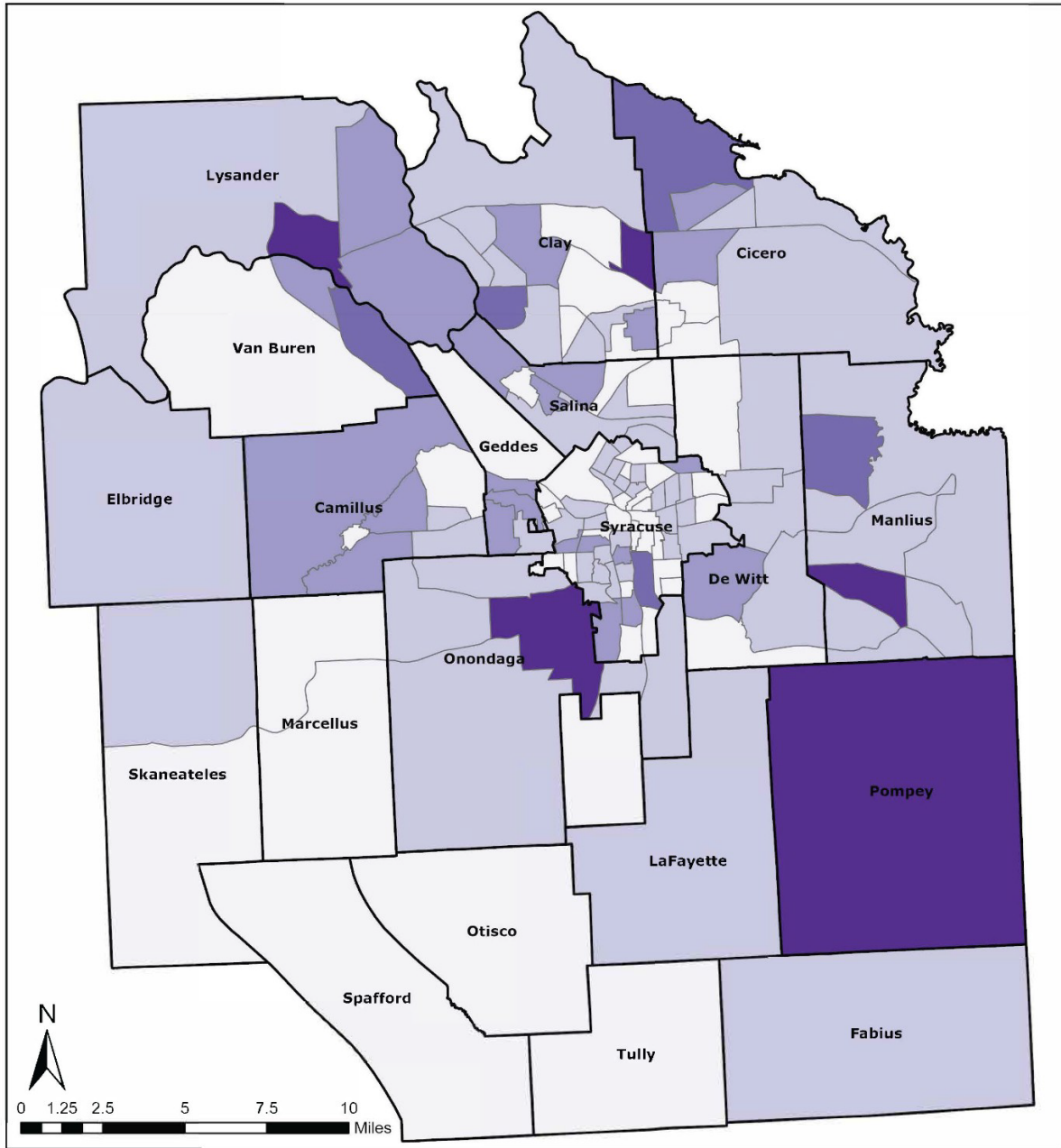
Ages	Total Population	Max Potential Demand	Max Potential Demand at 275% FPL¹
Infants & Toddlers (Age 0-2)	15,329	10,346	5,186
Preschool (Age 3-5)	16,376	11,148	5,765
Total	31,705	21,494	10,951

¹ Child care demand for families that live in households below 275% of the federal poverty line

Table 6: Top 10 Census Tracts with Highest Estimated Potential Child Care Demand, ACS Estimates 2015-2019

Rank	Census Tract	Town/City	Overall Child Care Demand
1	163	Onondaga	484
2	151	Manlius	445
3	157	Pompey	437
4	116	Lysander	426
5	112.42	Clay	425
6	102	Cicero	400
7	111.01	Clay	334
8	55	Syracuse	329
9	118	Van Buren	327
10	154	Manlius	321

Map 3: Onondaga County Maximum Potential Demand for Child Care for Children Aged Five and Younger by Census Tract (2019)

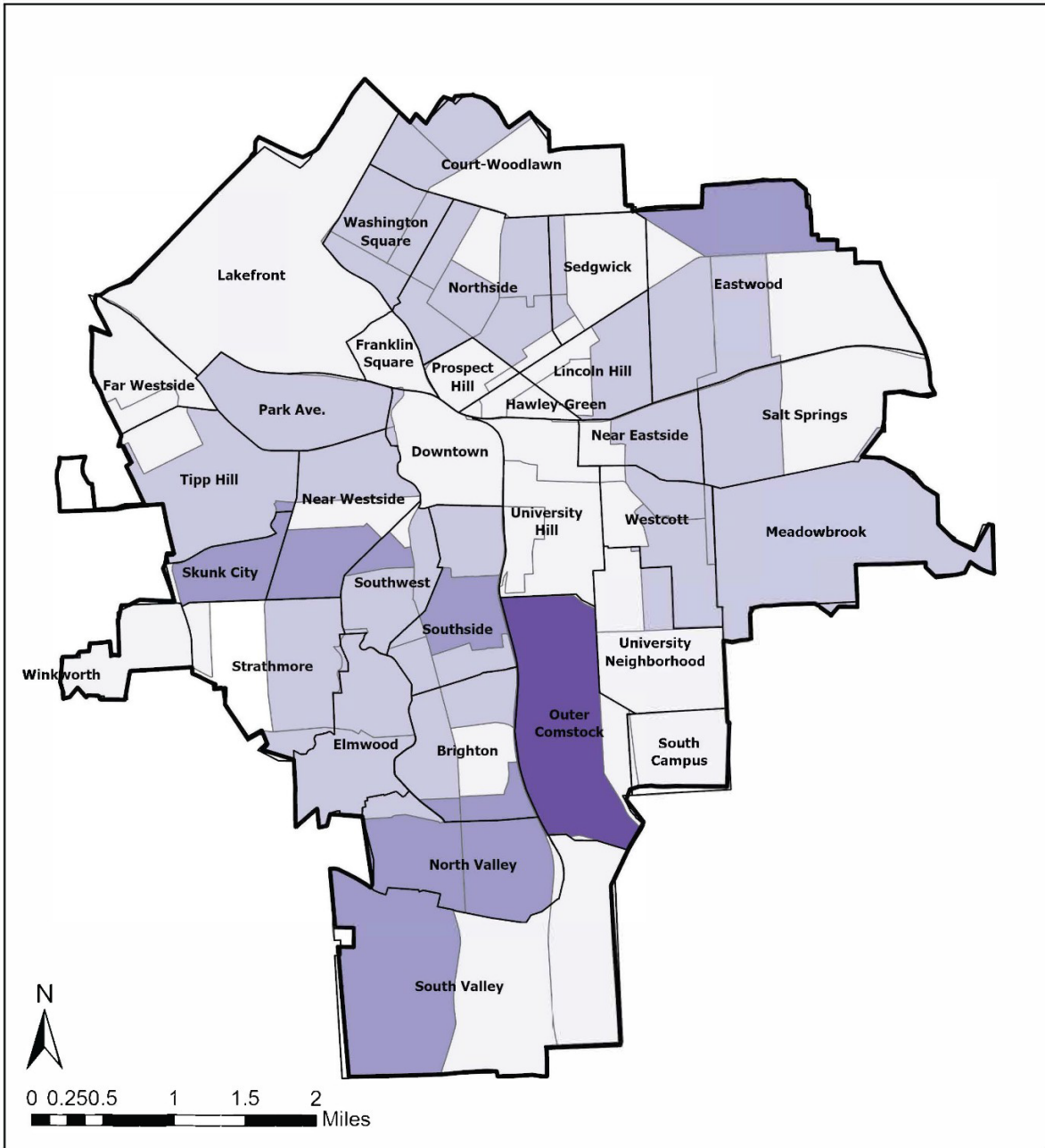


Onondaga County Demand for Child Care for Children Ages 0-5 by Census Tract (2019)

Date: 8/18/2022

Legend	City/Town Boundaries
Infant, Toddler, and Preschoolers Demand (Pop 0-5 years)	
0 - 100	(Lightest purple)
101 - 200	(Light purple)
201 - 300	(Medium-light purple)
301 - 400	(Medium-dark purple)
401 - 500	(Darkest purple)

Map 4: Syracuse City Maximum Potential Demand for Child Care for Children Aged Five and Younger by Census Tract (2019)



City of Syracuse Demand for Child Care for Children Ages 0-5 by Census Tract (2019)

Date: 8/18/2022

Legend

- City of Syracuse Boundary
- Neighborhood Boundaries
- Infant, Toddler, and Preschoolers Demand (Pop 0-5 years)
- 0 - 100
- 101 - 200
- 201 - 300
- 301 - 400

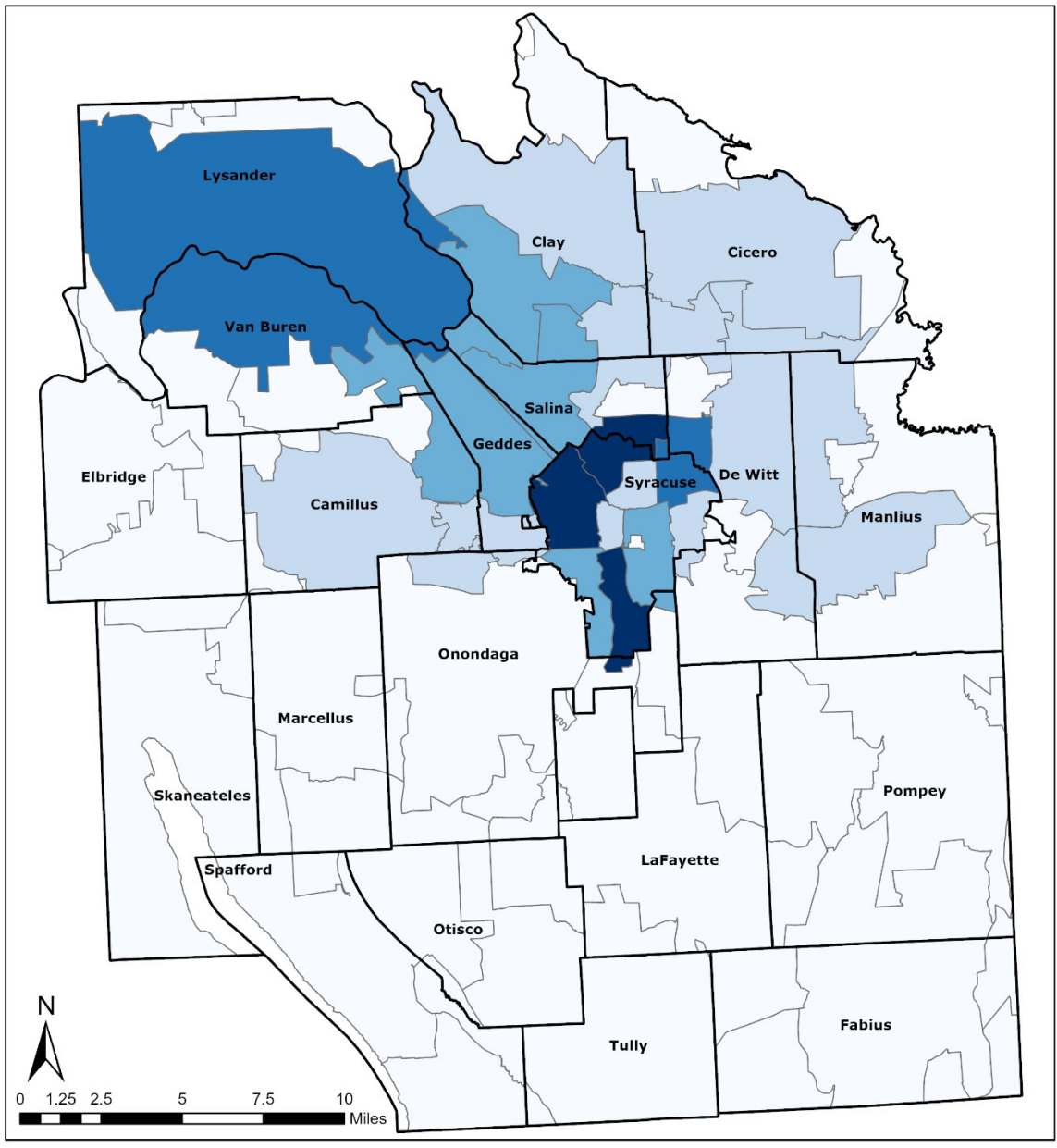
The demand and eligibility patterns across the County change when we consider households living below 275% FPL. Under these parameters, Syracuse, Lysander, Van Buren, Salina, Clay, Geddes, and Camillus have census tracts with the highest number of families that are eligible for and have a potential

demand for subsidized child care through the County’s child care subsidy program or for placement in EHS or HS programs. See Table 7 for a full breakdown of the zip codes with the highest eligibility for subsidized care. The spatial variation can be seen in more detail in Maps 5 and 6.

Table 7: Top 10 Zip Codes with Highest Potential Child Care Demand and Eligibility for Subsidized Care Amongst Households Living Below 275% FPL, ACS Estimates 2015-2019

Rank	Zip Code	Town/City	Eligibility for Subsidized Child Care
1	13205	Syracuse	972
2	13204	Syracuse	891
3	13208	Syracuse, Salina	830
4	13027	Lysander, Van Buren	705
5	13206	Syracuse, De Witt	688
6	13090	Clay	542
7	13207	Syracuse	542
8	13210	Syracuse	507
9	13209	Geddes, Camillus	436
10	13088	Salina, Clay	425

Map 5: Onondaga County Demand and Eligibility for Subsidized Child Care for Children Aged Five and Younger Living Below 275% FPL by Zip Code (2019)

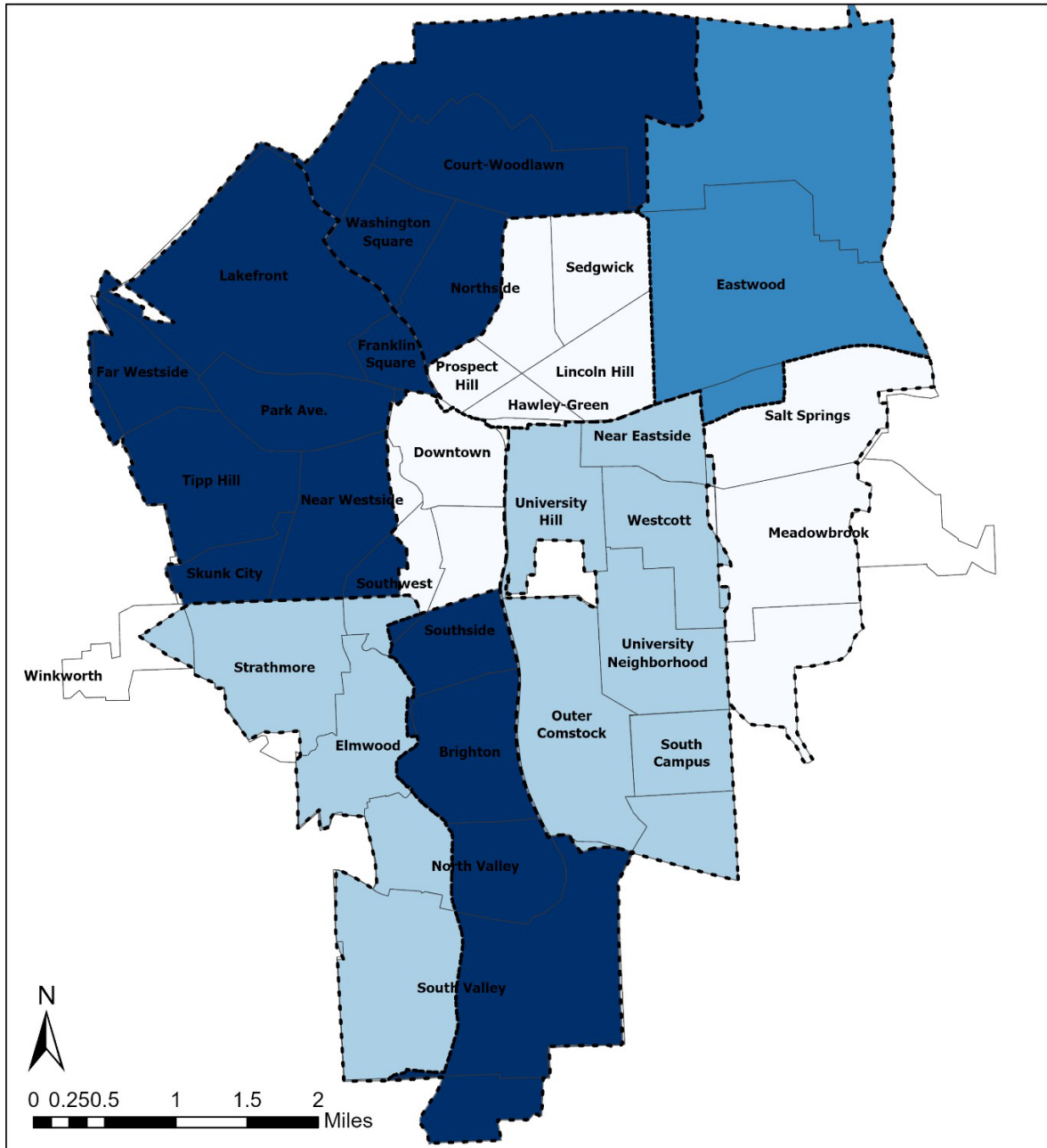


Onondaga County Demand for Child Care for Children Ages 0-5 Living Below 275% FPL by Zip Code (2019)

Date: 9/6/2022

<p>Legend</p> <ul style="list-style-type: none"> ▬ City/Town Boundaries Infant, Toddler, and Preschoolers Living Below 275% FPL Demand (Pop 0-5 years) 1 - 200 201 - 400 401 - 600 601 - 800 801 - 1000
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Map 6: Syracuse City Demand and Eligibility for Subsidized Child Care for Children Aged Five and Younger Living Below 275% FPL by Zip Code (2019)



City of Syracuse Demand for Child Care for Children Ages 0-5 Living Below 275% FPL by Zip Code (2019)
 Date: 9/6/2022

Legend

- Zip Code Boundaries
- Neighborhood Boundaries
- Subsidized Care Demand at 275% FPL (2019)
- 214 - 400
- 401 - 600
- 601 - 800
- 801 - 1000

The Child Care Supply Gap - Comparing Supply and Demand Estimates

This section of the report focuses on the core of our analysis; the calculation of the child care supply gap in the county. We explore the relationship between the supply of formal and subsidized legally exempt child care for infants and toddlers with the demand for infant and toddler child care. At the census tract level, we focus on comparing the supply of formal and licensed child care provider capacity with overall demand for child care. Finally, we evaluate the gaps in provision of subsidized child care by evaluating the difference between the maximum potential demand and eligibility for subsidized care with the provision of subsidies by Onondaga County DSS-ES.

General Child Care

Key Findings:

- In 2021, there was a supply gap of 12,123 seats in Onondaga County. There were more than two children under the age of five per available licensed and subsidized legally exempt child care slot. In 2019, there was a supply gap of 8,574 seats in Onondaga County.
- Across Onondaga County, the 10 census tracts that have the largest supply shortages are located in Lysander, Clay, Cicero, Syracuse, Manlius, Pompey, Van Buren, and, and Camillus.

Table 8 shows the supply gap for child care for families in Onondaga County that have a high likelihood of demanding child care services in 2021. The supply estimate for this comparison uses our most comprehensive supply measure – the number

Table 8: *Onondaga County Child Care Supply Gap Summary, 2021*

Ages	Max Potential Demand	Available Supply	Supply Gap	Supply Gap %
Infants & Toddlers (Age 0-2)	10,346	2,930	7,416	72%
Preschool (Age 3-5)	11,148	6,441	4,707	42%
Total	21,494	9,371	12,123	56%

that includes formal and licensed provider slots, UPK slots, and subsidized legally exempt care. It does not include informal care that is not subsidized such as nannies, au-pairs, relatives, neighbors, or friends.

The demand estimate is our maximum potential demand for child care assuming that parents need child care if they are both working. As such, the supply shortages estimated in this scenario are an upper-bound estimate of shortages and can be refined and updated as more data become available over time.

In this scenario, as evidenced in Table 8, there are 9,371 available seats for infant, toddler, and preschool aged child care and a maximum potential demand of 21,494 infants, toddlers, and preschoolers. This results in a total supply shortage of 12,123 seats. This number reflects the total number of seats that the county would need to provide in addition to the existing capacity to meet the needs of every infant, toddler, and preschooler that may need child care. This information informs us that the current available slots, excluding informal unsubsidized care, meets 44% of the total demand

for child care in 2021. In 2019, the supply gap was smaller, with a supply shortage of 8,574 slots (see Table 9). In 2019, 60% of the maximum potential total demand for child care was met.

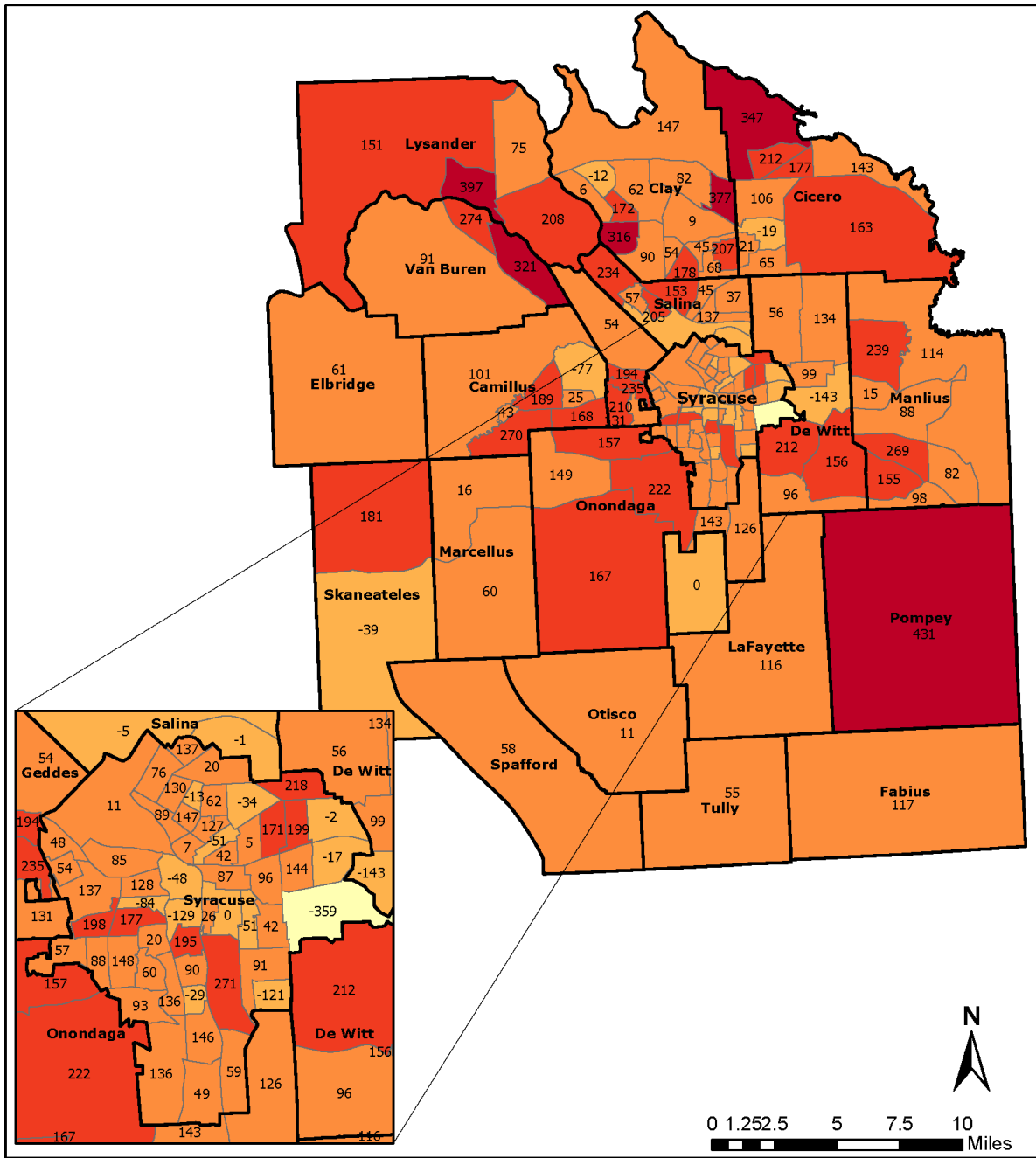
In addition to the overall supply gap, it is helpful to policymakers and funders to identify the specific locations within the county that are especially underserved. This provides key insights for targeting programmatic and investment activity to address the unmet needs in underserved areas. For that reason, we assess the supply shortages at the census tract level.

Map 7 depicts the variation in supply shortages across the county, while Map 8 displays the same information in the City of Syracuse. Areas with a high positive number on the map denote census tracts where the total demand far outweighs the number of available slots within that census tract. Areas with a large negative number on the map denote census tracts where the total supply far outweighs the potential demand for child care. For example, the Meadowbrook neighborhood in Syracuse has a high density of child care providers but a lower number of children in that area demanding child care.

Table 9: Onondaga County Child Care Supply Gap Summary, 2019

Ages	Max Potential Demand	Available Supply	Supply Gap	Supply Gap%
Infants & Toddlers (Age 0-2)	10,346	3,659	6,687	65%
Preschool (Age 3-5)	11,148	9,261	1,887	17%
Total	21,494	12,920	8,574	40%

Map 7: Onondaga County Child Care Supply Gap by Census Tract (2021)



Onondaga County Child Care Supply Gap by Census Tract (2021)

Date: 9/7/2022

Legend	
	City/Town Boundaries
	Child Care Supply Gap (2021) -359 - -300
	-299 - -150
	-149 - 0
	1 - 150
	151 - 300
	301 - 450

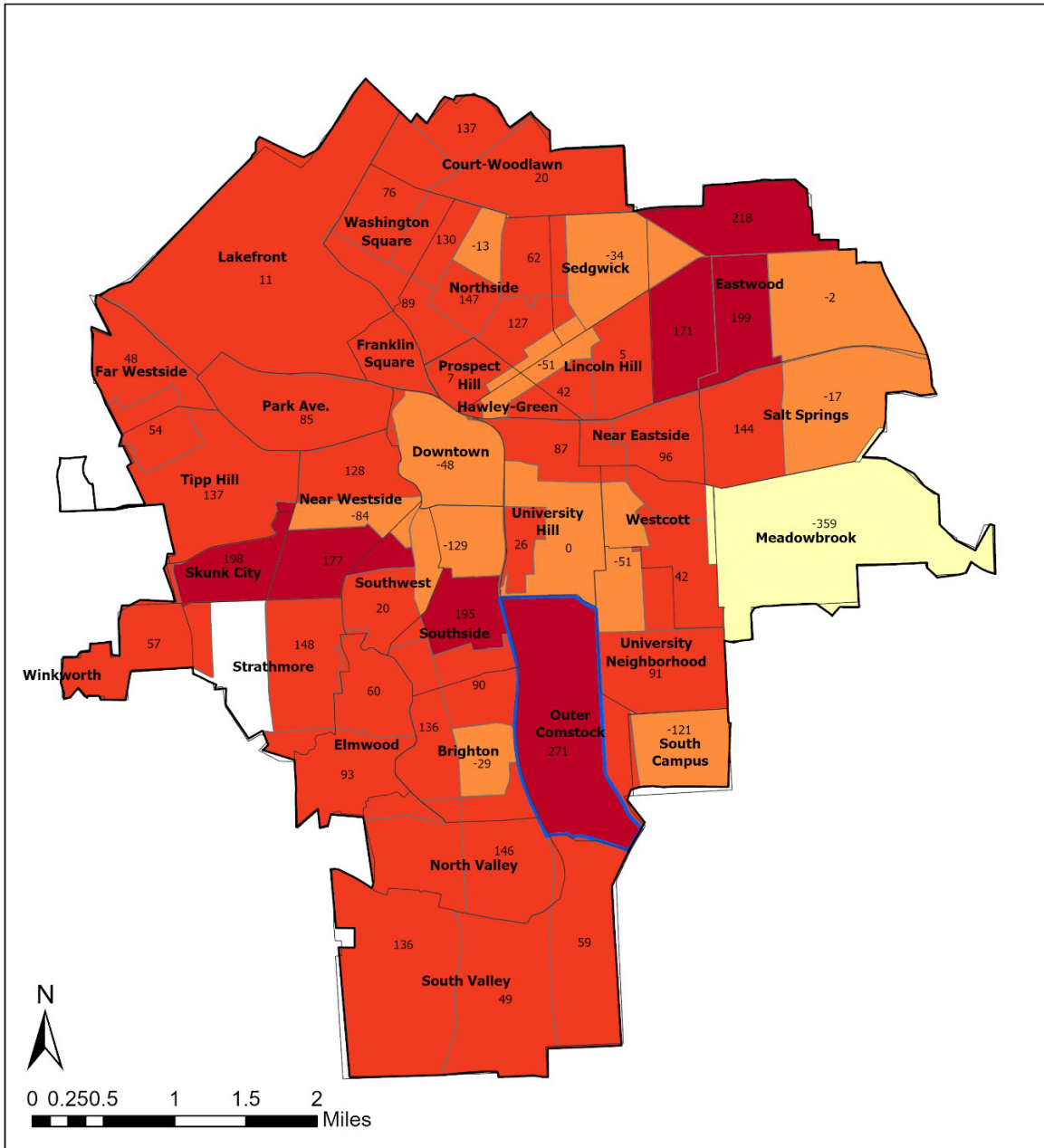
Table 10 highlights the 10 census tracts that have the largest supply shortages given their demand. These 10 census tracts are located across the County in Lysander, Clay, Cicero, Syracuse, Manlius, Pompey, Van Buren, and Camillus. Table 10 shows that the supply gap in the majority of these census tracts is greater than 90%.

However, it is important to note that the supply gap measure for this analysis does not guarantee that the children in these areas are not receiving any child care services. It is possible that residents of these tracts are able to commute to meet their child care needs given their unique family conditions and income.

Table 10: *Top 10 Census Tracts with Largest Child Care Supply Gap, 2021*

Rank	Census Tract	Town/City	Demand	Supply	Supply Gap	Supply Gap %
1	157	Pompey	437	6	431	99%
2	116	Lysander	426	29	397	93%
3	112.42	Clay	425	48	377	89%
4	102	Cicero	400	53	347	87%
5	118	Van Buren	327	6	321	98%
6	111.01	Clay	334	18	316	95%
7	117	Van Buren	298	24	274	92%
8	55	Syracuse	329	58	271	82%
9	123	Camillus	270	0	270	100%
10	151	Manlius	445	176	269	60%

Map 8: Syracuse City Child Care Supply Gap by Census Tract (2021)



City of Syracuse Child Care Supply Gap by Census Tract (2021)

Date: 9/7/2022

<p>Legend</p> <ul style="list-style-type: none"> City of Syracuse Boundary Neighborhood Boundaries Top 10 Highest Need Census Tracts 	<p>Child Care Supply Gap (2021)</p> <ul style="list-style-type: none"> -359 - -300 -299 - -150 -149 - 0 1 - 150 151 - 300
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Subsidized Care

Key Findings:

- In 2021, there was a subsidized supply gap of 8,686 slots in Onondaga County. Of the total number of families that were eligible for and had a potential demand for child care, only 21% received subsidies for child care.
- In 2019, there was a subsidized supply gap of 6,021. Of the total number of families that were eligible for and had a potential demand for child care, 45% received subsidies for child care.
- Across Onondaga County, the zip codes with the greatest supply shortages for subsidized care were concentrated in Lysander, Van Buren, Clay, Geddes, Salina, and Syracuse.
- Under the new expanded eligibility criteria of 300% FPL, there would have been a subsidized supply gap of 9,558 slots in Onondaga County in 2021. Of the total number of families that would have been eligible for and had a potential demand for child care at 300% FPL, only 19% would have received subsidies for child care.

The analysis evaluates how the potential demand and eligibility for subsidized child care compares to the provision of subsidies in 2019 and 2021. As Onondaga County is one of the counties implementing the Workforce Development Institute (WDI) pilot that allows families living below 275% FPL to be eligible for a child care subsidy, we estimate the subsidized child care supply gap at the 275% FPL demand levels. The experience of high-income parents differs significantly from lower income parents, highlighting the importance of looking at the gaps in subsidized child care provision. High-income parents who lack access to formal and regulated child care in their neighborhoods have resources to access

Table 11: *Onondaga County Subsidized Care Supply Gap (at 275% FPL), 2019*

Ages	Eligible for Subsidized Child Care	No. of Children Receiving Subsidies	Subsidy Supply Gap	Subsidy Supply Gap %
Infants & Toddlers (Age 0-2)	5,186	2,302	2,884	56%
Preschool (Age 3-5)	5,765	2,628	3,137	54%
Total	10,951	4,930	6,021	55%

Table 12: *Onondaga County Subsidized Care Supply Gap (at 275% FPL), 2021*

Ages	Eligible for Subsidized Child Care	No. of Children Receiving Subsidies	Subsidy Supply Gap	Subsidy Supply Gap %
Infants & Toddlers (Age 0-2)	5,186	939	4,247	82%
Preschool (Age 3-5)	5,765	1,326	4,439	77%
Total	10,951	2,265	8,686	79%

unregulated providers such as nannies and au-pairs or commute or travel to different locations to access child care. For low-income parents, a shortage of child care providers that are eligible for subsidies in their neighborhood may present a greater challenge. Tables 11 and 12 present the overall supply gap in subsidized child care in 2019 and 2021, respectively, for Onondaga County for both children two and younger and those aged three to five.

In 2019, there were 10,951 children living in households below 275% FPL that had a potential demand and eligibility for subsidized child care. During this year, Onondaga County DSS provided subsidies and program fee assistance for 4,930 children placed in child care. This resulted in a subsidized care supply gap of 6,021 seats, which is nearly 55% of the total eligible population. In 2021, there were 8,686 children who did not receive subsidized child care despite being eligible at the 275% FPL level. The gap between the number of eligible families potentially needing subsidized child care and the provision of subsidies grew to 79%, or an increase of 44% since 2019. Tables 13 and 14 show the 10 zip codes with the greatest subsidized supply gap in 2019 and 2021. The change in community need between 2019 and 2021 is visually represented in Maps 13 and 14.

It is important to note that Onondaga County DSS- ES has not had waiting lists for families applying for subsidy; they have been able to provide subsidies to all applicants that met the eligibility criteria. Therefore, the subsidized supply gap presented here highlights a different problem to one about availability. The data suggests that parents may be unaware or do not believe they meet the eligibility requirements for subsidized care. It could also indicate that, despite the available subsidies, parents were unable to pay the 35% parent share fees, or they may have had a personal preference for care provided by family or friends that was not eligible for child care subsidy. The qualitative analysis described in later sections provides more insight into the reasoning behind low-income families' decisions around child care.

Mapping the subsidized care supply gap across Onondaga County highlights that there are particular locations that have a high potential demand for child care that are eligible for the child care subsidy but that are not accessing subsidies through the county program. Of note, the maps for the subsidized child care supply gaps are at the zip code level, as the subsidy data are only available at that level. For the purposes of this analysis, we used the HUD crosswalk to convert the demand estimates from the census tract level to the zip code level. Maps 9, 10, 11, and 12 indicate that the largest gaps in supply of subsidized child care were in Central and Northern Onondaga County. In particular, in both 2019 and 2021, the zip codes with the greatest supply shortages for subsidized care are concentrated in Lysander, Van Buren, Clay, Geddes, Salina, Camillus, and Syracuse.

Table 13: Top 10 Zip Codes with Largest Subsidy Supply Gap, 2021

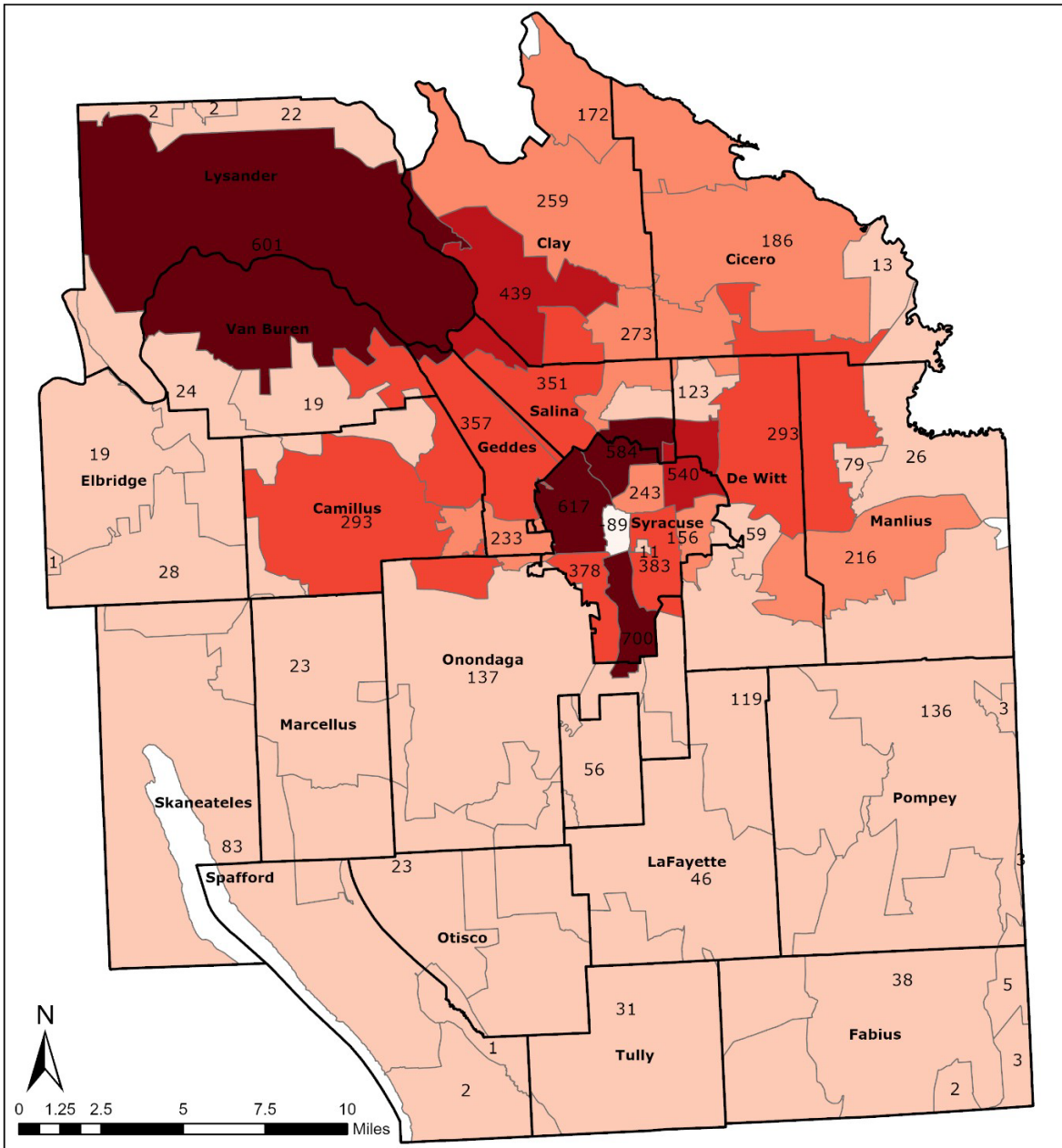
Rank	Zip Code	Towns/Cities	Eligible for Subsidized Child Care	No. of Children Receiving Subsidies	Subsidy Supply Gap	Subsidy Supply Gap %
1	13205	Syracuse	972	147*	825**	85%**
2	13204	Syracuse	891	152*	739**	83%**
3	13208	Syracuse, Salina Lysander, Van	830	170*	660**	80%**
4	13027	Buren	705	73*	632**	90%**
5	13206	Syracuse, De Witt	688	87*	601**	87%**
6	13090	Clay	542	55*	487**	90%**
7	13210	Syracuse	507	64*	443**	87%**
8	13207	Syracuse	542	114*	428**	79%**
9	13209	Geddes, Camillus	436	44*	392**	90%**
10	13088	Salina, Clay	425	48*	377**	89%**

* = Decrease from 2019 ** = Increase from 2019

Table 14: Top 10 Zip Codes with Largest Subsidy Supply Gap, 2019

Rank	Zip Code	Towns/Cities	Eligible for Subsidized Child Care	No. of Children Receiving Subsidies	Subsidy Supply Gap	Subsidy Supply Gap %
1	13205	Syracuse	972	272	700	72%
2	13204	Syracuse	891	274	617	69%
		Lysander, Van				
3	13027	Buren	705	104	601	85%
4	13208	Syracuse, Salina	830	246	584	70%
5	13206	Syracuse, De Witt	688	148	540	78%
6	13090	Clay	542	103	439	81%
7	13210	Syracuse	507	124	383	76%
8	13207	Syracuse	542	164	378	70%
9	13209	Geddes, Camillus	436	79	357	82%
10	13088	Salina, Clay	425	74	351	83%

Map 9: Onondaga County Subsidized Child Care Supply Gap for 275% FPL Child Care Demand by Zip Code (2019)

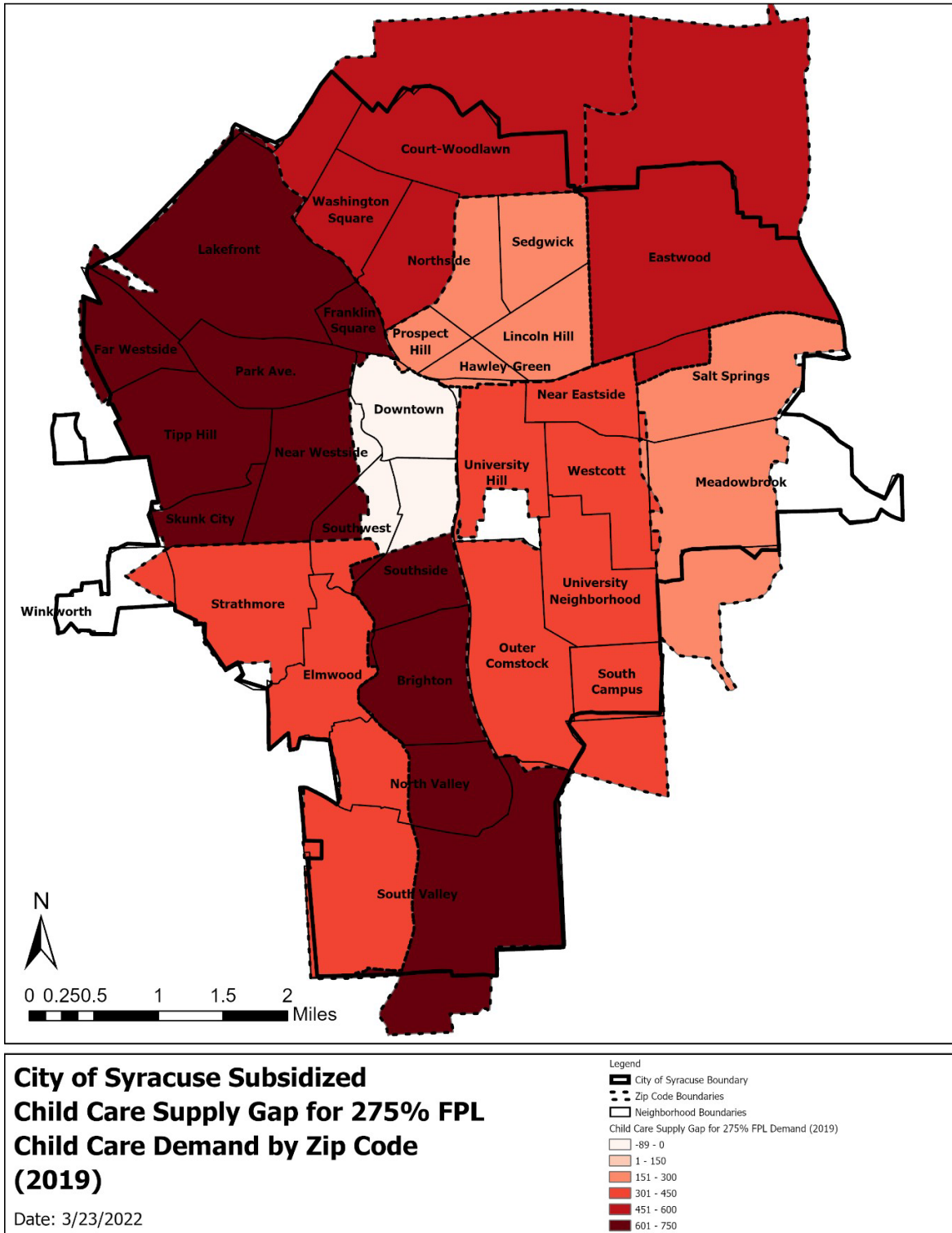


Onondaga County Subsidized Child Care Supply Gap for 275% FPL Child Care Demand by Zip Code (2019)
 Date: 3/23/2022

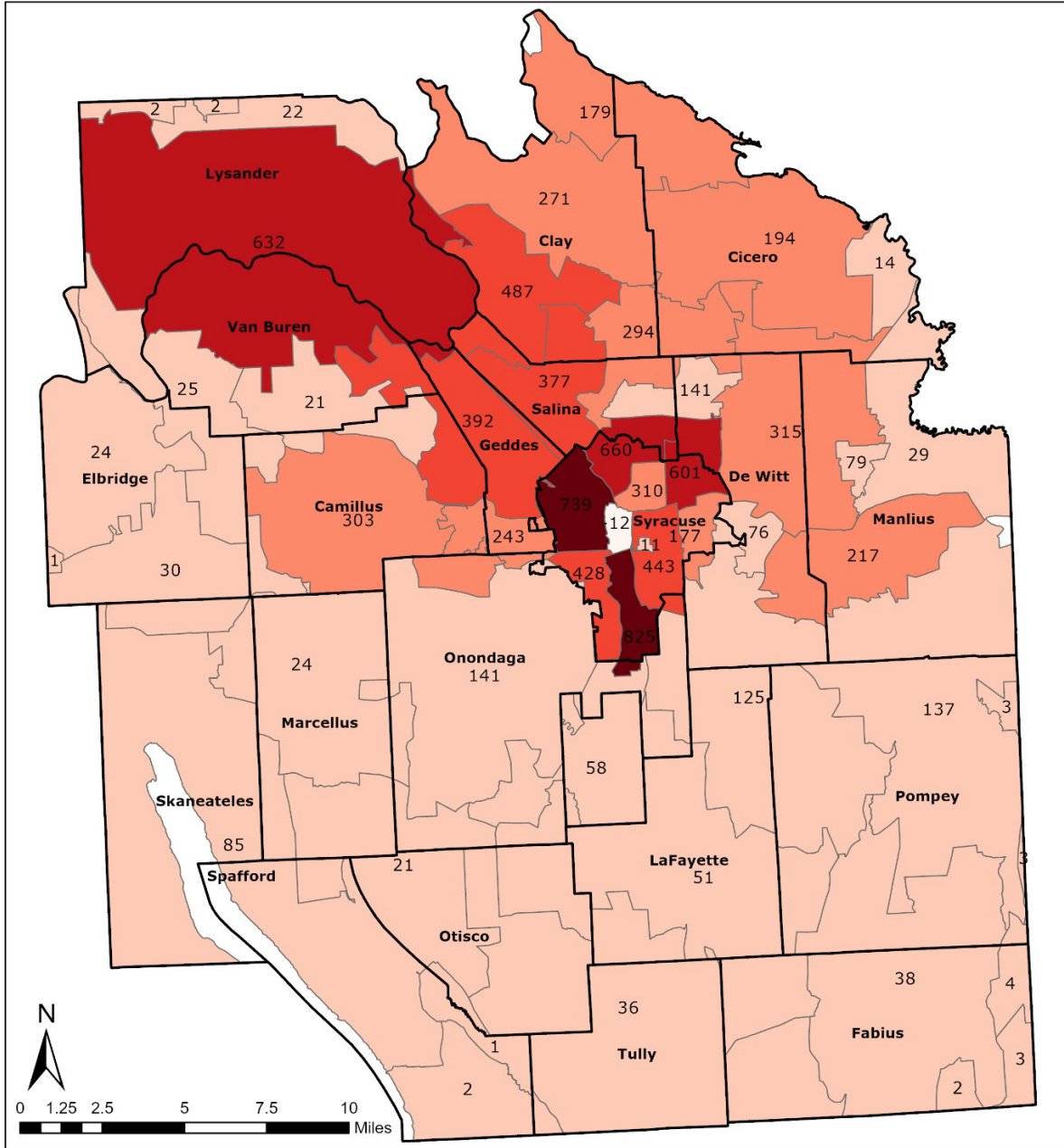
Legend

- City/Town Boundaries
- Child Care Supply Gap for 275% FPL Demand (2019)
 - 89 - 0
 - 1 - 140
 - 141 - 280
 - 281 - 420
 - 421 - 560
 - 561 - 700

Map 10: Syracuse City Subsidized Child Care Supply Gap for 275% FPL Child Care Demand by Zip Code (2019)



Map 11: Onondaga County Subsidized Child Care Supply Gap for 275% FPL Child Care Demand by Zip Code (2021)

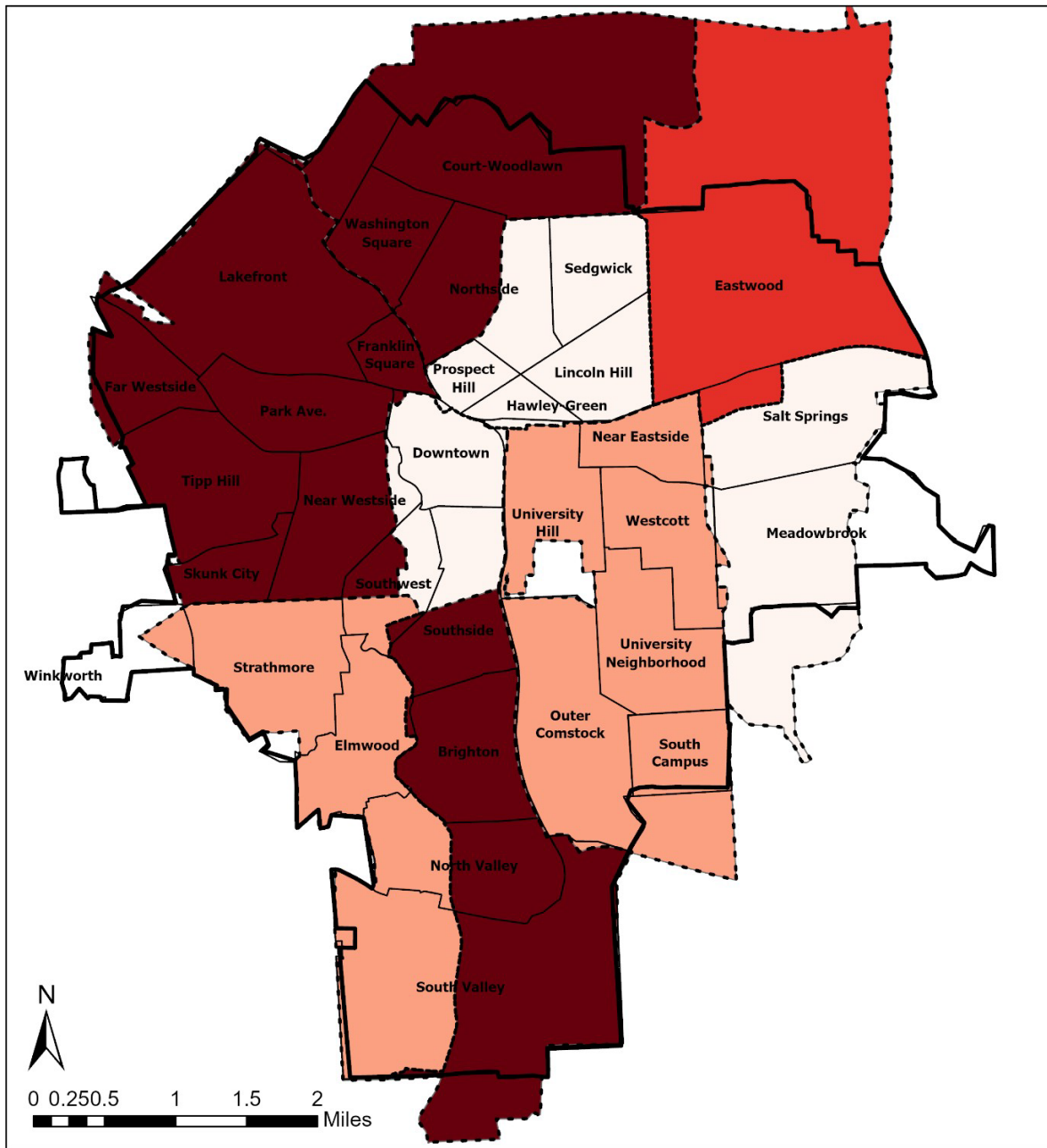


Onondaga County Subsidized Child Care Supply Gap for 275% FPL Child Care Demand by Zip Code (2021)

Date: 3/23/2022

Legend	
	City/Town Boundaries
Child Care Supply Gap for 275% FPL Demand (2021)	
	-12 - 0
	1 - 175
	176 - 350
	351 - 525
	526 - 700
	701 - 875

Map 12: Syracuse City Subsidized Child Care Supply Gap for 275% FPL Child Care Demand by Zip Code (2021)

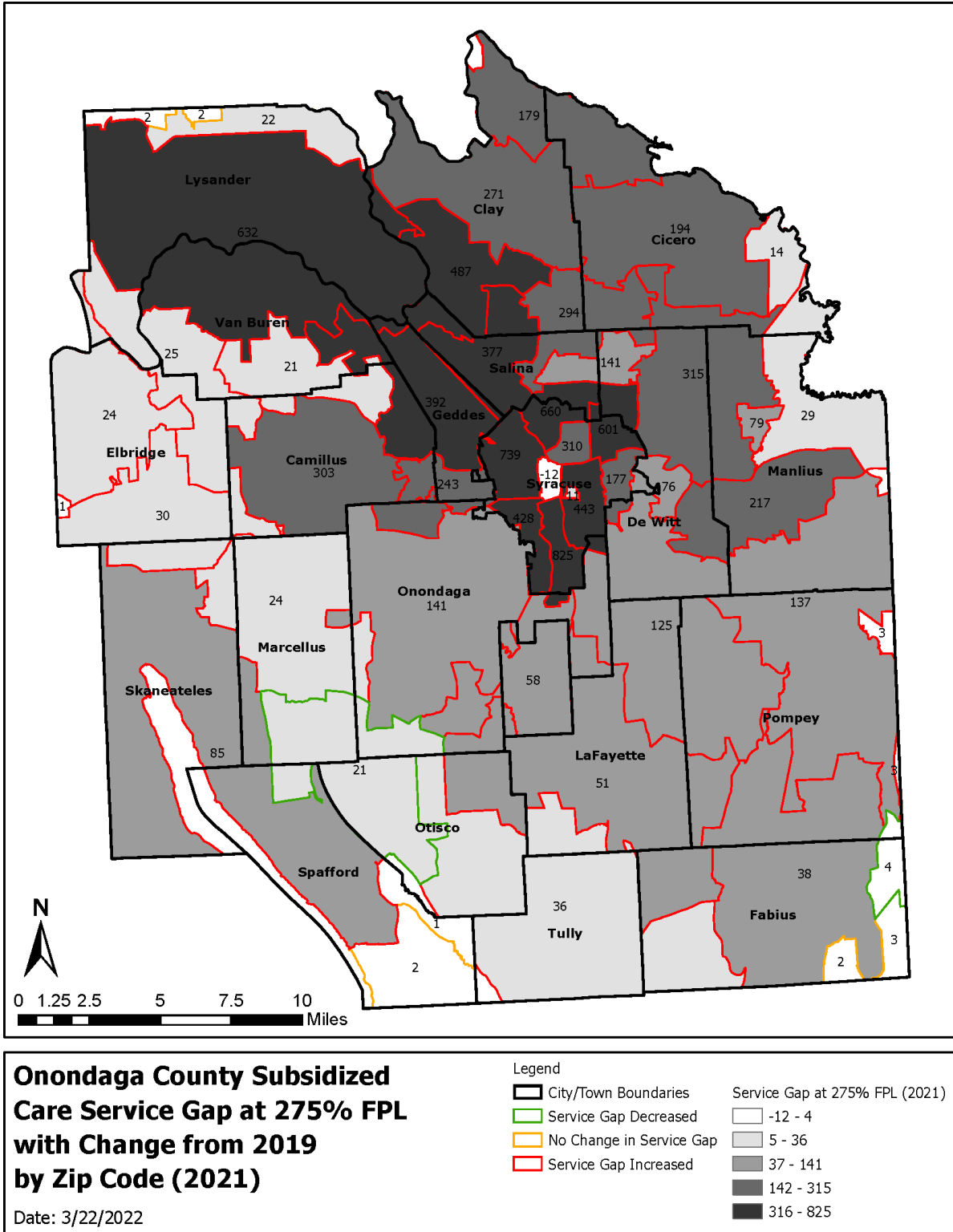


City of Syracuse Subsidized Child Care Supply Gap for 275% FPL Child Care Demand by Zip Code (2021)

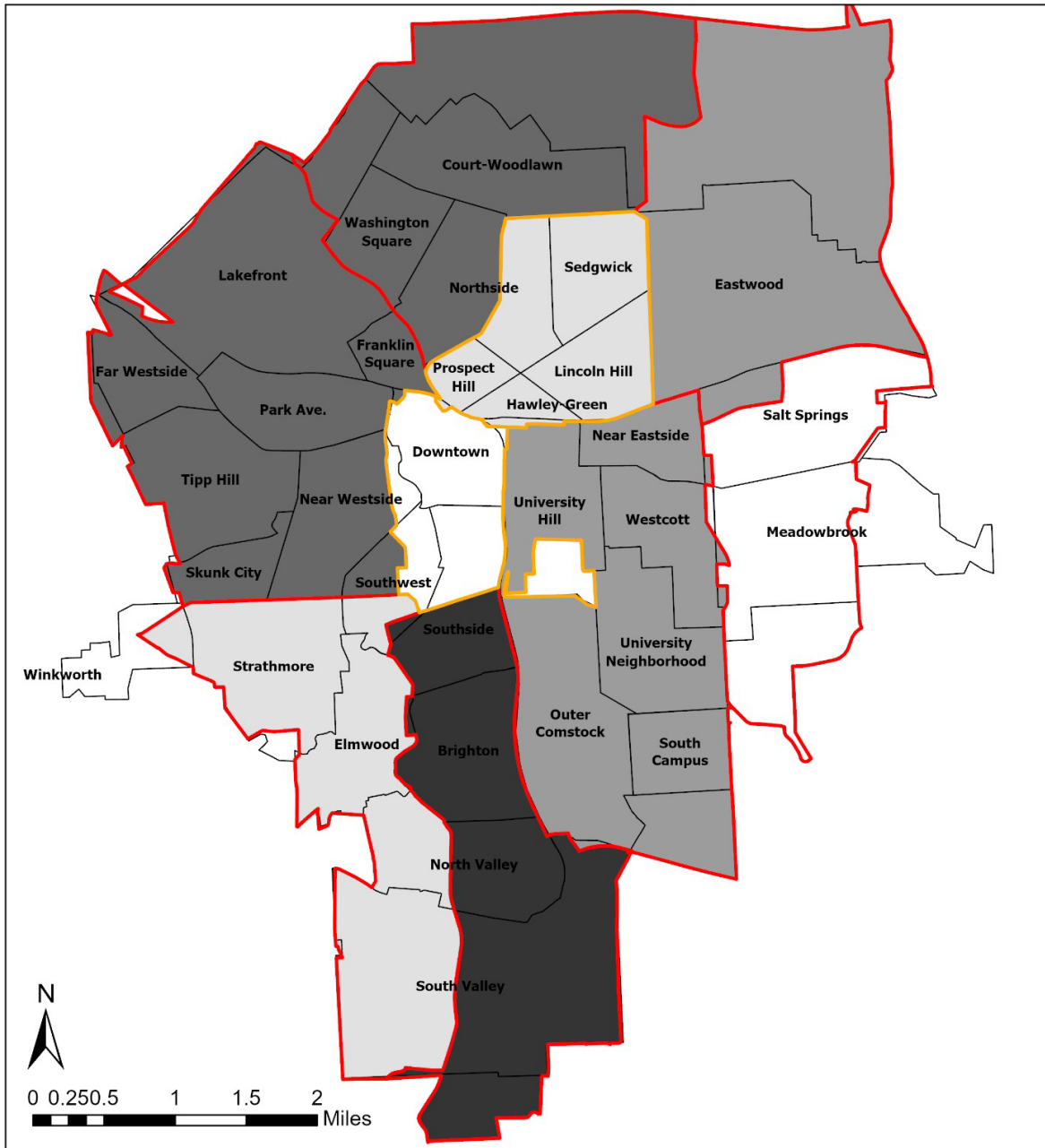
Date: 3/23/2022

- Legend**
- City of Syracuse Boundary
 - Zip Code Boundaries
 - Neighborhood Boundaries
 - Child Care Supply Gap for 275% FPL Demand (2021)
 - 214 - 400
 - 401 - 600
 - 601 - 800
 - 801 - 1000

Map 13: Onondaga County Subsidized Care Service Gap at 275% FPL with Change from 2019-2021



Map 14: Syracuse City Subsidized Care Service Gap at 275% FPL with Change from 2019-2021



City of Syracuse Subsidized Care Service Gap at 275% FPL with Change from 2019 by Zip Code (2019)

Date: 3/24/2022

- Legend
- City of Syracuse Boundary
 - Neighborhood Boundaries
 - No Change in Service Gap
 - Service Gap Increased
 - Service Gap at 275% FPL (2021) -12 - 177
 - 178 - 428
 - 429 - 601
 - 602 - 739
 - 740 - 825

Subsidized Supply Gap at 300% FPL

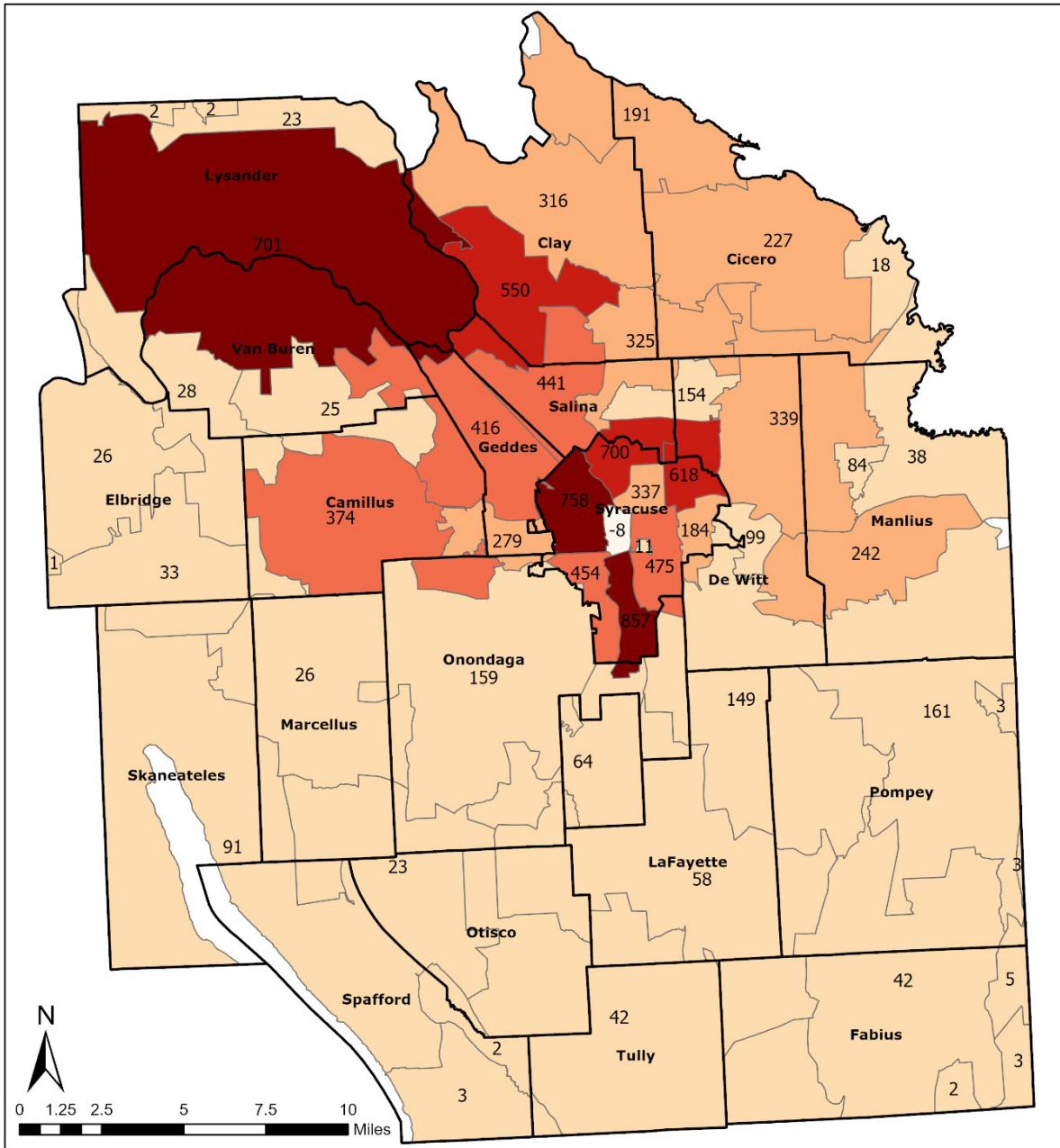
On August 1st, 2022, the eligibility criteria for child care subsidies was expanded from 200% to 300% of the Federal Poverty Level (FPL). This change will exacerbate the supply gap in subsidized care as additional families become newly eligible for child care assistance. As we do not have real time data, the X Lab has used ACS census data and 2021 supply data to estimate what the subsidized care supply gap would be at the new 300% FPL eligibility criteria. Tables 15 presents the overall supply gap in subsidized child care in 2021 for Onondaga County for both children two and younger and those aged three to five assuming a 300% FPL eligibility level.

After accounting for households living below 300% FPL, our estimates indicate that there are 11,823 children that are eligible for and potentially demand subsidized child care, EHS, and HS. In 2021, Onondaga County DSS-ES provided subsidies and program fee assistance for 2,265 children placed in child care. This resulted in a subsidized care supply gap of 9,558 seats, which is nearly 81% of the total eligible population. The spatial variation of the subsidized care supply gap in 2021 is visually represented in Maps 15 and 16.

Table 15: *Onondaga County Subsidized Care Supply Gap (at 300% FPL), 2021*

Ages	Eligible for Subsidized Child Care	No. of Children Receiving Subsidies	Subsidy Supply Gap	Subsidy Supply Gap %
Infants & Toddlers (Age 0-2)	5,603	939	4,664	83%
Preschool (Age 3-5)	6,220	1,326	4,894	79%
Total	11,823	2,265	9,558	81%

Map 15: Onondaga County Subsidized Child Care Supply Gap for 300% FPL Child Care Demand by Zip Code (2021)



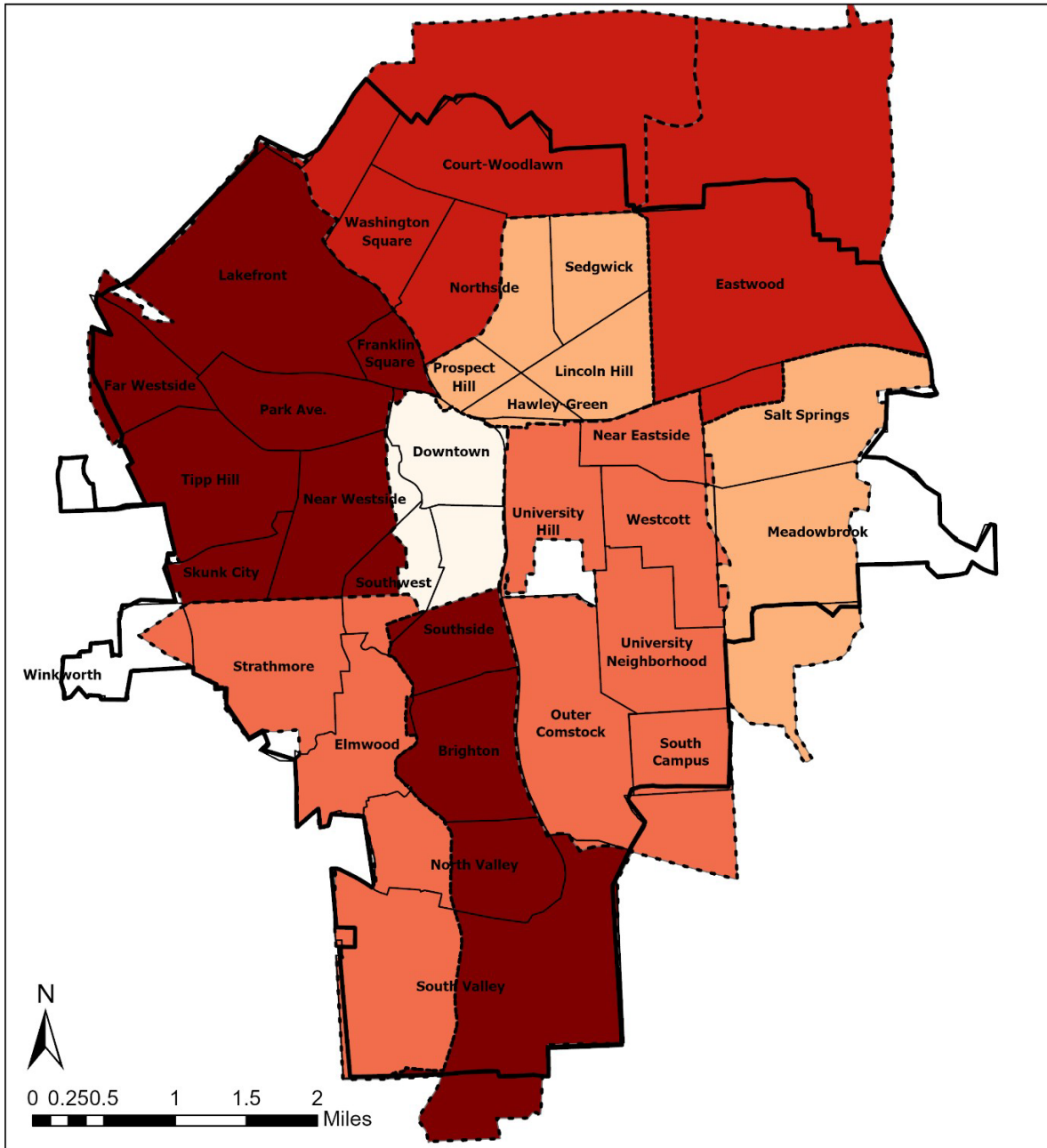
Onondaga County Subsidized Child Care Supply Gap for 300% FPL Child Care Demand by Zip Code (2021)

Date: 8/19/2022

Legend

- City/Town Boundaries
- Child Care Supply Gap for 300% FPL Demand (2021)
 - 8 - 0
 - 1 - 175
 - 176 - 350
 - 351 - 525
 - 526 - 700
 - 701 - 875

Map 16: Syracuse City Subsidized Child Care Supply Gap for 300% FPL Child Care Demand by Zip Code (2021)



**City of Syracuse Subsidized
Child Care Supply Gap for 300% FPL
Child Care Demand by Zip Code
(2021)**

Date: 8/19/2022

Legend

City of Syracuse Boundary	Child Care Supply Gap for 300% FPL Demand (2021)
Zip Code Boundaries	-8 - 0
Neighborhood Boundaries	1 - 175
	176 - 350
	351 - 525
	526 - 700
	701 - 875

Qualitative Results

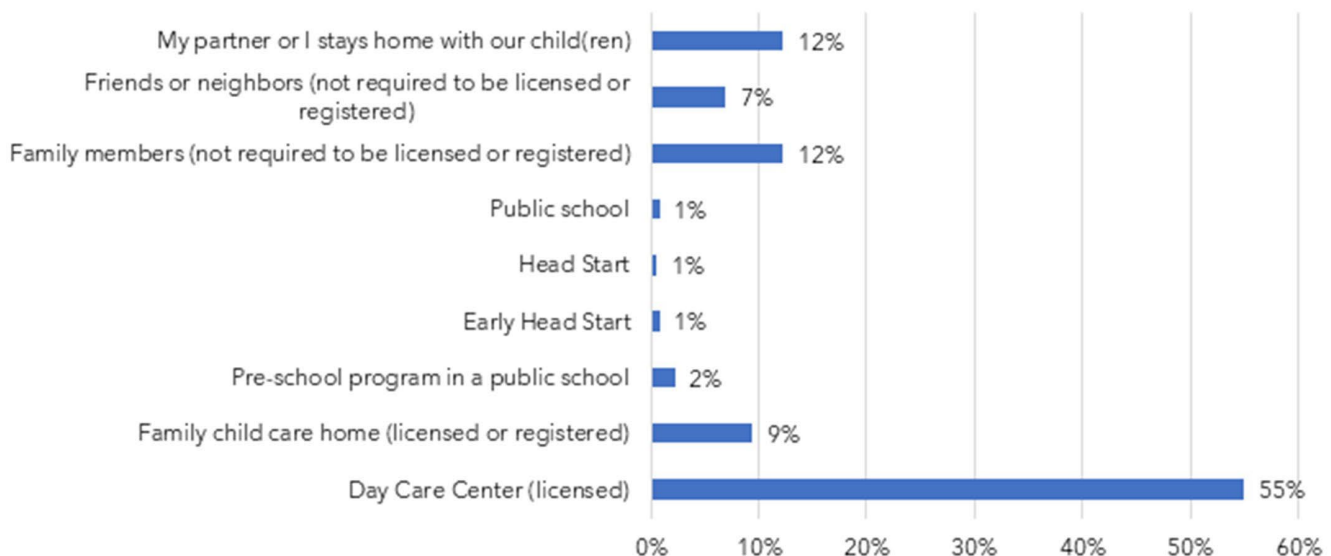
The qualitative findings in this report provide a voice that complements the quantitative data. Through county-wide surveys and focused conversations, both parents and providers offer insight into how they experience child care: the challenges, the impact, and the implications. Focus group participants were primarily from the City of Syracuse. While many overarching themes are of little surprise, the qualitative data provide a deeper understanding of the complexity of the challenges faced by both parents and providers.

The results of the county-wide (n=362; 38 out of 45 Onondaga County zip codes represented) parent survey found slightly over half of parent respondents currently using day care centers for their child care needs, with the remainder using a mix of licensed and unlicensed family or neighbors, and some stay-at-home options.

Table 16: How old are your children?

	Birth – 18 months	19 - 36 months	37 months – 4 years	5 - 12 (in school)
Child #1	81	80	109	89
Child #2	40	54	56	65
Child #3	10	11	9	29
Child #4	1	3	8	3
Child #5	0	0	1	4
Child #6	0	1	0	0
	132	149	183	190

Chart 5. For your children under the age of 5: What form of child care do you use most of the time? Check one.



The top three challenges/problems reported were affordability, quality of care, and access. However, in order to examine these results through an equity lens, this question was then disaggregated by those receiving versus those not receiving subsidies. This disaggregation of the data shed light on how two populations experienced the current child care challenges. The top two challenges for parents surveyed, disaggregated by subsidy status:

- subsidized households cited challenges related to *cost and access/availability, and*
- unsubsidized households cited challenges related to *cost and quality.*

Further survey and focus group data illuminated the nuanced experience of these two groups. While unsubsidized households voiced the challenges of obtaining quality child care, subsidized households overwhelmingly concentrated on variables pertaining to access, i.e., child care not available for the hours needed, waiting lists, and transportation issues. These results highlight the ways in which income either enables or restricts the ability of families to focus on desirable attributes, such as quality, when choosing care.

Participants in the focus groups described implications of these challenges: missing work, parents dropping out of school, children missing school, and decreased motivation to be gainfully employed. Child care was identified as the single-most identifiable variable influencing a parent's ability to be gainfully employed.

"I didn't have transportation. Okay, so I had to get up at four o'clock in the morning to get me and my baby ready to catch the bus downtown. Then transfer over get my baby to daycare and then wait like 30-40 minutes, catch the bus going all the way back

downtown and then catch and connect the bus to go to school."

"My biggest worry about taking the new job opportunity was child care. Waitlists are insane, especially for the places that have really amazing reviews."

"I'm having a really hard time finding daycare in my area because nobody in my area will take the DSS-ES subsidy."

While tangible variables like cost and access were ranked highest in the challenges parents faced, focused conversations identified trust as the number one priority when choosing child care.

"I want a facility that I trust but you have to go with what is available."

"Me and my husband take care of our kids full time. Don't trust anybody."

Providers also face challenges delivering quality child care. Daycare Centers are in critical need of quality staff and substitutes. Cost is also a challenge. Centers are losing qualified teachers to the school districts because they cannot compete with the pay and benefits.

Licensed Family Child Care providers (FCCs) face similar challenges with little support by way of temporary substitutes. FCCs are frustrated by regulations limiting "allowable # of children" based on their living space and wanting to improve their space but lacking the finances to do so.

"Space-wise, parents are looking for safety, where they play, with what, and what are you offering them. I am set up like Pre-K; parents come in first day to see what is happening. My backyard is not totally fenced

in, which has been a deal-breaker for some people that didn't eventually sign up."

"Full now. I am only allowed 5 kids total, per my living space."

Child care providers offered their perspectives on what they saw as parents' biggest challenges. Cost, availability, and access were again central to the conversation:

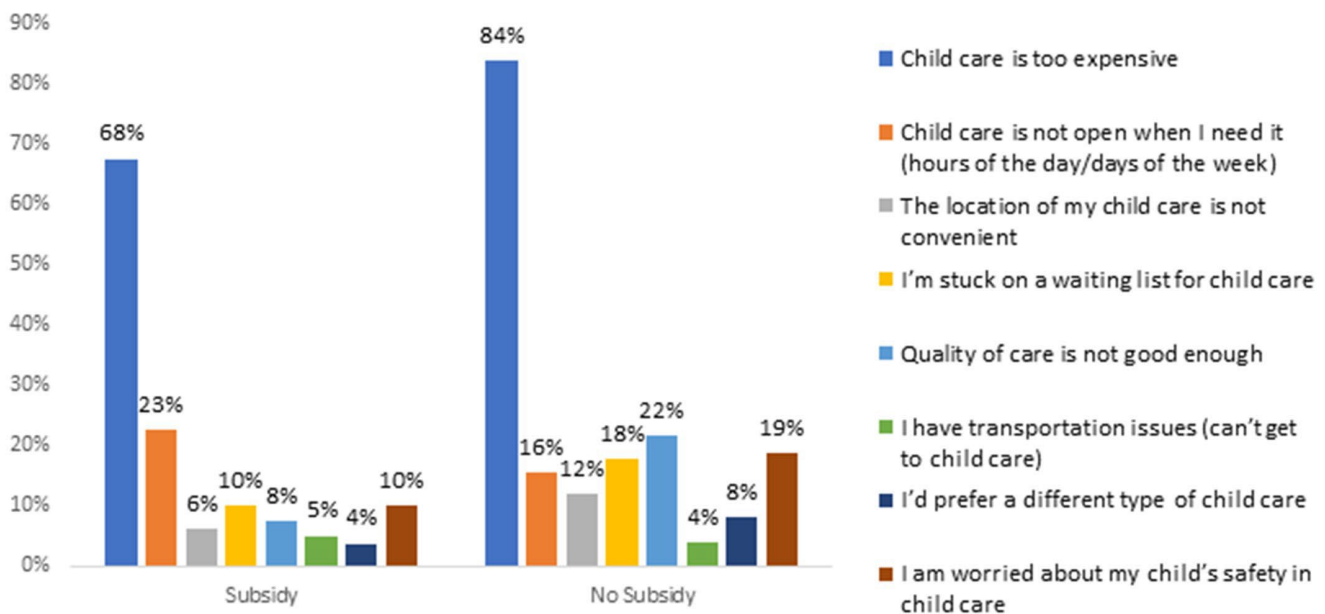
- Parents can't afford child care, especially when they pay out of pocket.
- Parents can't find daycare for evening/night shift.

"I have a lot of parents that say they can't find anyone to cover second shift. I don't do weekends. I have been told by parents that very few providers do weekends until 11pm."

- Lack of Infant Care

"I get a lot of calls for baby openings; we have a 2-1 ratio. 2 babies per provider."

Chart 6. What are your biggest problems with child care? Please choose your top 3.



Conclusion

The data is clear: Onondaga County does not have enough child care availability to meet current or potential demand. Not only are there not enough child care slots for the number of children needing care, but there is also a lack of availability of nontraditional hours for child care. Furthermore, this challenge is underscored by the fact that the existing child care has largely been unaffordable for families. Not only are families unable to find child care that is available and fits their specific family needs, but they cannot afford to pay for it. Subsidy expansion will help to improve affordability, but there is significant work to be done to help families understand and navigate this resource. Historically, families in Onondaga County may have been eligible for child care but still unable to afford their parent share. In addition, child care providers do not always accept child care subsidy payments and significant stigma exists around the usage of subsidies, particularly in more suburban communities.

Considering recent statewide and local policy shifts designed to broaden the impact of child care subsidies, affordability may prove to be less of a concern in the months and years to come. Yet, this begs the question: if families can now afford to pay for care, is there enough availability in the system to support this increased demand? Our data shows us that the local child care ecosystem is already strapped and requires robust, systemic investment in order to meet a rise in demand.

While significant investment is being made, there is still much work to be done to move New York in the direction of investing adequate resources to ensure that all families have access to affordable high quality child care. There are many families outside of the subsidy system that will not benefit from these

new investments, and more needs to be done to invest in attracting and retaining a high-quality workforce to achieve universal access to child care. Increasing the reimbursement rate to the 80th percentile and funding for up to 24 absences will go a long way towards stabilizing the child care infrastructure and thus the workforce, but it is also critically important to note that sustaining these investments will require either the federal government or New York State identifying an ongoing source of funding. Otherwise, all the progress we are making will be reversed over the course of the next three to four years. There will need to be continued advocacy for increased state and federal investment in child care, and we support efforts to make high quality child care more universally available in New York State. Until the child care system is wholly subsidized such that providers are paid the true cost of providing quality care and families can afford the child care they need, we will continue to face systemic barriers to caring for the children in our community.

Appendix 1: Detailed Methodology

Quantitative Analysis

The estimation model presented in this landscape analysis is an access assessment that utilizes data at the level of census tracts and zip codes. Census tracts are a US Census-defined geography that denote relatively permanent statistical subdivisions of a county. Census tracts can be as small as 1,200 people, with a maximum population of 8,000 people. This allows one to offer an assessment of the gaps in child care services within and across Onondaga County, as well as an aggregate analysis of the child care needs for the entire county.

In studying supply and demand of child care in Onondaga County, there are several challenges that are immediately apparent and require adopting several assumptions. To estimate supply, the X Lab was faced with the problems of limited comprehensive data on the location and capacity of all possible child care services. There is no existing database that provides a comprehensive listing of every child care program available, including private forms of child care such as neighbors, family, friends, au-pairs, etc. that are unregulated and untraceable. For studying demand, one needs to contend with the lack of information available on parental preferences, labor markets, and commuter data and how these factors influence how and where parents seek child care services. In response to these data limitations, this analysis relied heavily on working in close contact with numerous local child care experts, facilitators, and practitioners that could provide much needed guidance and data support. In partnership with Child Care Solutions, the ECA, Onondaga County DSS-ES, the Salvation Army, and PEACE, Inc., the researchers have combined several local datasets that, when taken together, provide a list of formal, regulated, subsidized, or licensed child care programs operating in the County. Notably, this dataset does not capture care provided by relatives, neighbors, nannies, au-pairs, or friends that have not been subsidized. As a collective, we believe that our estimates of supply presented in this analysis provide the best available estimate of the supply of early child care in Onondaga County.

To measure demand, the researchers utilized population estimates from the ACS. In particular, we utilized the 2015-2019 five-year estimates that represent data collected over a period of time and have the advantage of a larger sample size, increased statistical reliability of the data for hard-to-reach subgroups, and data for smaller geographic areas such as the census tract level. However, estimates of the population under the age of five do not accurately represent the potential demand for early child care. Using total population rates would suggest that every parent wants to place their children in child care. However, there are no data on parental preferences for child care for every household. Therefore, one needs to make assumptions on the types of households that are likely to need child care in order to provide demand estimates. For the purposes of our analysis, the X Lab assumed that any child living in a household where all

their parents participate in the workforce needs to be placed in child care.¹¹ We utilize the ACS table B23008 “Age of own children under 18 years in families and subfamilies by living arrangements by the employment status of parents” to estimate the demand for child care at the census tract level. Notably, our approach does not allow us to account for commuting patterns throughout the county and, therefore, demand for child care in a census tract was based on the parents’ residence. This is a very important distinction to note, as it is often the case that parents want child care services on their way to their workplace or close to their workplace to better respond to any emergency situation at the daycare.

In addition to measuring overall demand estimates for child care, the analysis calculates the demand for federal and state subsidy programs by census tract. EHS and HS are federal programs that were established to promote and improve the school readiness and long-term educational outcomes of children from birth to age five from low-income families. These programs aim to provide supportive learning environments to children from low-income families that allows them to enhance their cognitive, social, and emotional development. EHS serves children from birth through two years of age, while HS serves children from three to five years of age. The eligibility criteria are children from families whose income is below 200% FPL. Therefore, the researchers estimate the potential demand for EHS and HS as the percentage of children living in households below 200% FPL multiplied by the overall demand for child care services. We use a similar strategy for estimating the demand for state subsidized child care by considering children in families whose income is below 275% FPL (300% FPL as of August 1, 2022).

To measure supply, we utilized combined datasets from Child Care Solutions, Onondaga County DSS-ES, and the Onondaga County school districts. Though this allows one to capture the most comprehensive listing of available providers, the datasets were not provided at the same geographical levels. This complicates the spatial analysis and the calculation of the supply gap. At the county level, the X Lab was able to provide supply estimates of formal, regulated, licensed, and unlicensed providers that include provider seating capacity for child day care centers, family child care, group family day care, school age child care, UPK (half day and full day), legally exempt relative care, legally exempt non-relative care, and legally exempt group child care. At the census tract level, data are only available for formal and licensed provider seating capacity for the most recent year. At the zip code level, the X Lab provides estimates of the total number of subsidies provided directly to families for child care services.

The varying geographic levels for the supply of child care directly impact the calculation of the supply gap. For each child care program type, the study counts the number of seats available by providers participating in each program and subtracts the number of children who are eligible for each respective program. The resulting total is the supply gap. Therefore, the overall child care supply gap is the overall demand for child care less the licensed provider seating capacity at the census tract level. The subsidized child care supply gap is the maximum potential number of families eligible for subsidized care living in households below 275% FPL less the number of subsidies provided to families. This calculation was done at the zip code level,

¹¹ This means that a child living in a two-parent home has a demand for child care services if both parents are in the labor force, and a child living in a single-parent home has a demand for child care services if their single parent is participating in the labor force.

as that is the level at which the supply of subsidized care was provided. To convert the demand estimates from the census tract level to the zip code level, we utilized the Department of Housing and Urban Development census tract to zip code crosswalk.

Throughout the process, the methods, assumptions, and estimates underlying the supply and demand analysis were shared with the community partners and screened and discussed for completeness and accuracy. It is important to underscore again that the estimates of supply, demand, and the supply gap rely on a set of key assumptions: the total potential demand is based on a child living in a household where all parents are working, that parents demand child care in the location in which they live; that total supply is the number of available licensed and regulated slots available; and that the supply gap is simply the difference between these two estimates. These estimates are based on the best available data, but it is essential to note that it does not capture the complete picture of the child care landscape.

Qualitative Analysis

To contextualize the hard data collected during the quantitative landscape scan, we felt it important to speak directly with parents and providers in Onondaga County. We developed a layered approach in which families had opportunities to participate in the research with either a short, light touch approach via an electronic survey or a more intensive focus group. There were four distinct categories of individuals whose feedback was solicited: FCC and GFDC providers, Day Care Center Administrators, parents of children 0-5 who live in the City of Syracuse, and parents of children 0-5 who live in Onondaga County. These focus groups were held over the course of several weeks in February and March 2022. With the exception of the City of Syracuse family focus groups, all focus groups were held virtually over Zoom. The decision to hold the majority of the focus groups virtually was made in light of a surge in the COVID-19 pandemic and to decrease barriers to participation. Many families joined the focus groups with their children in tow or during naptime/bedtime.

Recruitment strategies for focus groups varied depending on the target audience:

Day Care Center Administrators received direct communication from Child Care Solutions via an email listserv that includes all Day Care Administrators in Onondaga County. This group is regularly convened (via this listserv) by Child Care Solutions to hear from guest speakers or discuss topics pertaining to Day Care administration.

Family Child Care and Group Family Day Care providers received direct communication from Child Care Solutions via email listservs that include all licensed home-based child care providers in Onondaga County. In addition, key messengers associated with CSEA VOICE (union representing home-based child care providers) and PEACE, Inc.'s Early Childhood Career Pathways Program solicited participants.

City of Syracuse families were recruited to participate in focus groups by Blueprint 15 community navigators. These navigators are staff members who live in the Blueprint 15 target area (high need area in the City of Syracuse) and develop relationships with neighbors and community residents.

Onondaga County families were recruited using a trusted messenger approach, developed in conjunction with the ECA’s Director of Family Engagement. We developed a list of individuals who act as trusted messengers in their local community and solicited their help in identifying possible participants. We worked to recruit messengers who live and work in all areas of the City of Syracuse, as well as those who have reach into more suburban and rural communities.

In scheduling and developing focus group protocols, we consulted the professional development team at Child Care Solutions, a representative from CSEA VOICE, and parents to identify days and times that would cater to each group. Providers were offered time midday (to target the lunch and/or naptime hour) and afternoon or evening (to target the space before or after pickup). Families were offered midday sessions on weekends or evenings on weekdays. To compensate participants for their time and contributions, all participants received a \$50 cash gift card. The ECA’s Director of Early Learning Strategy began each focus group with a brief introduction of the study and opportunity for participants to ask questions. After the introduction, Mary Welker, lead researcher for the R/E/D Group, conducted the focus groups using the following guidelines. Focus groups were transcribed either by a live notetaker or recorded and transcribed after the fact. The identity of all participants was kept anonymous.

Conversation Prompts (for families)

- 1. Think back to when you first sought child care for your child. What was most important to you making that decision?**
 - a. Where did your child go for daycare? When, Where, How, Who
 - b. What did you consider as priorities when deciding on child care?
 - i. Did these priorities change over time?
 - c. What was most important to you?
- 2. Think about your current situation, who organizes child care day-to- day?**
 - a. Do you have more than one “source” for child care?
 - i. What are they?
 - ii. Which is preferred?
 - b. Do you receive financial support (subsidies) for child care? If not, are you aware that there are child care subsidies?
 - c. What adjustments/changes (if any) did you make to accommodate your preferred child care?
 - d. What hours of the day is child care needed?
 - e. What was most important to you when deciding and what were you looking for?
- 3. What are your biggest challenges/obstacles related to child care?**
 - a. How did you deal with them?
 - b. Did they change over time?
- 4. If you had a magic wand and could create child care for your child, what would it look like?**

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- a. You listed your priorities for choosing child care earlier, would you add to your list in this scenario?
 - b. How would your current child care arrangement look different (or would it be the same?) if you could wave a magic wand and have ideal child care?

Conversation Prompts (for providers)

- 1. How long have you been in the early childhood education field?**
 - a. How long have you been an XXX provider (change based on modality)?
- 2. What are some of the biggest challenges that you are facing right now in delivering child care?**
 - a. To what do you attribute these challenges?
 - b. What are some of the biggest challenges facing the families that you care for?
- 3. Do you have a waitlist right now? How has your enrollment/capacity changed over the last several years?**
- 4. Thinking ahead to the next 5 years – what changes do you anticipate for your center/homebased care?**
 - a. Are you interested in expanding?
 - a. For Centers: adding additional location
 - b. For FCCs: becoming a group FCC and/or developing more as a small business
 - b. Do you plan on closing or retiring in the next 5 years?

In addition to holding a series of focus groups, we offered a short survey to all families of children aged 0-5 in Onondaga County. This survey was released through a variety of sources including general social media blasts through the ECA's various online platforms. In addition, the survey was circulated by community partners such as the Dolly Parton Imagination Library, United Way of CNY, CNY Diaper Bank, CenterState CEO, and the Manufacturers Association of CNY. Participants answered an anonymous, 11 question survey that asked them to reflect on their current child care situation. At the end of the survey, participants were able to enter into a raffle drawing for a \$50 cash gift card.

The challenges and limitations related to gathering the qualitative data are limited sample size and sample bias. Sample size for focus group participants were as follows: *parent focus group* participants n=23, *family child care* providers n=10, *day care center* directors n=4. Additionally, the parent focus group participants were primarily from the City of Syracuse. However, a survey was also distributed county-wide and captured feedback from 38 of the 45 zip codes in Onondaga County. It is the integration of qualitative and quantitative data that provide a mixed method approach and can improve the research by ensuring the limitations of one type of data is balanced by the strengths of the other.

Appendix 2: Detailed Qualitative Findings

Challenges

FCC Child Care Challenges

- Waitlists
 - Many FCCs are at capacity but would be willing to take more children.
 - Providers often have space but lack staff to take more children.
 - There appears to be a need/want for the provider/child ratio to increase to both help with the demand and stay open financially in the coming years. There appears to be a critical need for infant care. Providers lack places to refer clients as well.
 - Lack Support/Substitutes
 - Time off for vacation or even a few hours for doctors' appointments is a challenge for FCC's.
 - Substitutes for FCC providers tend to be informal for sole providers (husbands, or family member etc.). Lack of trust of outside support/help – not wanting to hire (protective of who is around "their" kids) or finding it to be too much of a hassle.
 - Substitutes need to have 15 hours of training every year to fill this gap no matter how many hours they help (3 hours for doc appts or full time).
 - Re: Assistants: "I don't have a hard time finding them. I just started and I can't afford one yet. I want to go group and I know I will have to have an assistant. I will have to interview candidates at some point.
 - Cost
 - "There is a need to raise rates, but families can't afford it and will back out." When a daycare center is \$250/week it's hard to compete with, especially with their expenses rising (heat and everything – COVID-19).
 - Competing with Pre-K (free) and daycare centers (cheaper) while trying to stay afloat.
 - Location/area
 - "I found somewhere else to move to that is in a better area. A lot of parents call me concerned about the area. I really don't have a lot to say about the outside environment. I have people come view the daycare, love it, love me, but not like the area. I have some parents concerned about the area, but they want it because it is close to where they work."
 - "I feel like I can go group at my new location. I currently live downstairs and I have been running into some issues with the people upstairs. Issues around exits and they have dogs. I have tried to get them to understand what to expect but it has been difficult."
 - Space
 - FCCs spoke about ways in which they wished they could improve their space. Fences (privacy), home improvements, and moving were all being considered; however, providers lacked the financing to do so.
 - "Space-wise, parents are looking for safety, where they play/with what/what are you offering them. I am set up like Pre-K; parents come in first day to see what is happening. My backyard is not totally fenced in, which has been a deal-breaker for some people that didn't eventually sign up."
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- “Full now. I am only allowed 5 kids total, per my living space.”
 - “My husband said that I should’ve picked a bigger house.”
 - Regulations (too intense) vs. Trust from Parents
 - “CSS is constantly looking for a mistake. Parents are looking to trust provider rather than them “being up to code,” I wish they would spend more time documenting my struggles vs. CCS regulations (waiting for them to make a false move).”
 - COVID-19
 - “I felt a lot of pressure to keep the children and their families safe, and to keep my own family safe; this pressure wasn’t coming from parents, it was pressure I put on myself.”
 - “Keeping up with everything has been hard, checking emails and news to make sure following regulations – so many changes (rules to comply) to keep up with and communicate to families. Worried about keeping masks on children and trying to get them outside. Everyone was scared of everything. I needed to constantly reassure the parents. Many were essential workers.”
 - “You had to be a teacher because all of a sudden, all kids who went to school were no longer going and you took them in for the entire day.”

FCC Perspectives

What do they (providers) see as parent challenges?

- Parents can’t afford child care, especially when they pay out of pocket.
- Parents can’t find daycare for evening/night shift.
 - “I have a lot of parents that say they can’t find anyone to cover second shift. I don’t do weekends. I have been told by parents that very few providers do weekends until 11pm.”
- Lack of Infant Care
 - “I get a lot of calls for baby openings; we have a 2-1 ratio. 2 babies per provider.”

What do they (providers) think parents are looking for?

- Someone they can trust.
- Parents looking for: love/family, safe and clean environment.
- They look for what is provided: outdoor play, enrichment, nourishment, too but mostly a loving “home” environment.

How do FCC providers see themselves?

- Counselors/Educators: (counseling etc.) – these providers are often supporting the parents (informing/education etc.).
- Providers view those they care for as their family. “This is my bubble” “These are my kids/my family” – not worried about parental pressures, but more so put the pressure on themselves to make sure kids are safe and happy. They worked as a family in COVID-19 (group think – masks on when stranger arrives, etc.).

What does their future look like?

- This new Pre-K for free is enticing to families, her families all pay out of pocket, especially families with multiple kids – “I foresee myself losing money and then can’t stay open.”

-
- “I see myself changing it into more of a preschool setting instead of just a daycare. I see myself having a little afterschool program.”
 - “Massive amounts of regulations, hopefully it gets smoother.”

Something they are all proud of:

“We’re finally recognized as essential workers!!! Thanks to COVID-19 - before they were “chopped liver”- finally people see that the system breaks down when parents can’t go to work. Providers stayed open and all daycares closed – they were front line workers!”

Daycare Center Directors Overarching Themes

All participants (4) were directors of their current programs and had been in the field for 20+ years total (+30 for ¾ of them)

Largest challenges:

- Staffing & Quality Staff
 - Need educated and credentialed staff.
 - Without the staff, they can’t take the number of kids that need care or cannot provide the level of care that some children require (special needs).
 - Consistent substitutes.
 - Many have increased their pay, but it is impossible to compete with minimum wages rising so rapidly elsewhere.
 - In this industry, the onboarding process has a long turnaround time (~4 months some places) with all of the clearances and extensive paperwork that are required.
 - College age population that used to fill the gaps (either for a job or an education requirement) are not there in the same numbers, and they do not have the same level of work ethic/drive/mental health to stay employed.
 - COVID-19 testing/exposure protocols are extremely time consuming, leaving huge staffing gaps and burning-out staff that is available. Any level of symptoms = out for a week.
 - Losing qualified lead teachers to the school districts because they can’t compete with pay or benefits.
 - Hard to increase tuition when people view them as babysitters and not what they actually are – educators.
- Cost:
 - Hard to compete with UPK.
 - Decrease in usage of “wrap around care”- decreased revenue.
 - Infant care costs are far greater; “providing wipes, diapers etc. is expensive.” School age and toddlers are money makers. Infants are not.
- Administrative Help
 - Need for administrative help/service coordination – lots of filling the gaps.

Largest challenges for families:

- Cost

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- The cost of operating/staffing the daycare – having to charge families the difference. Tuition increases have had to be steep for the most part, causing parents to have to leave their jobs because they don't make enough to afford child care.
 - On top of increasing tuition, they have had to cut parts of the program (i.e., food program).
 - Exposures/closures
 - Many kids haven't been able to get vaccinated, so this is constant, and parents get frustrated that they can't bring in kids.
 - Forcing parents to get kids tested has not always been well received.

Changes coming up:

- Hoping to open back up to full capacity and recoup finances – fully staffed and enrolled and delivering “vibrant” quality care.

Parent Focus Groups:

What are the Challenges?

Lack of Transportation

A common thread among parent focus groups was the challenge of transportation. Parents often do not own a car and therefore depend on public transportation and Uber to travel from home to daycare and finally to work or school. This can take up to 2-3 hours each way. Weather was a contributing factor in the transportation challenge. Uber is often used in bad weather.

“I didn't have transportation. Okay, so I had to get up at four o'clock in the morning to get me and my baby ready to catch the bus downtown. Then transfer over get my baby to daycare and then wait like 30-40 minutes, catch the bus going all the way back downtown and then catch and connect the bus to go to school.”

“I will never get stuck on a bus again or have to worry about my kids being stuck in the cold. It just made me determined maybe you have to be hungry but I'm going to make sure me and my kids don't ever struggle like that again. I'm going to do what I can to make them warm. Make sure they can get where they need to go.”

“I have to call in, public transportation is not reliable when the weather is bad.”

“The bus can be crowded, gross, and at times violent.”

Implications:

- **Missing/late to work or school → job loss**
“Half the time I missed the bus, or it was late. And I would sometimes be late it was horrible.”
 - **Dropping out of school**
“I had to either choose to take care of my baby or get my education. And I had to work to take care of my baby, so I had to stop going to school.”
“Being that I was still underage and really couldn't work full time, they wouldn't approve my daycare for my daughter.”
 - **Proximity becomes a top priority for child care**
 When transportation is lacking, proximity becomes high on the list of priorities for child care.
-

- **Children not attending preschool**

School buses are not provided for preschool. Many walk their children to preschool which is often a half day program. Bad weather, and the time the walk takes often discourage regular attendance.

- **Longer unpaid hours**

Some get to work early or stay late to accommodate their ride.

Cost

All the parents we spoke to stated that cost was a challenge. Those receiving subsidies were grateful, admitting they would not be able to afford child care otherwise.

“Parents aren’t working because they have to pay for day care.”

“If I had to pay for child care- my paycheck would not be able to afford the child care I would want for my child.”

“I have ungodly student loans and that is not taken into consideration [subsidy]. It’s been a lot of scraping by to make things work for child care because so much of my paycheck goes to student loans.”

Implications:

- **Stepping down to a lower paying job**

Many parents admitted to consciously working just under the salary threshold to ensure they would continue to receive the DSS-ES subsidies or a local scholarship program funding. After experiencing the substantial quality of life decrease when they would lose the subsidy, they felt it was better for their family to return to a lower paying job.

“My subsidy from United Way was about to expire, I would’ve had to move back into a bad neighborhood. I was making too much to receive the subsidy but not enough to pay my bills.”

- **Requires parents to trade availability for value**

“I want a facility that I trust, but you have to go with what is available because of income.”

- **Decrease motivation to be gainfully employed**

“Where is the motivation to work, I’m thinking about taking a pay cut to get more help from the state. I pay taxes to get help and never get it. Kids go with grandma. Pay for grandma to help and grandma can’t work because she wants to be there for grandson.”

- **Work the night shift**

To avoid the daycare challenges in some two-parent households, one parent works nights so they can be home during the day with their children.

- **Feeling stuck**

“How am I supposed to take care of my baby and look out for myself?”

“I can’t work as much as everybody else – or I’ll lose my benefits. \$38,000 limit – you can’t own your own car, or have more than \$2,000 in the bank. They want us to be poor and stuck in the dirt forever.”

“I do get the workforce program. So I can’t do any overtime.”

Child Care Hours

There appears to be little availability for child care for early morning, second shift/night work schedules. “I have to find somebody that can take him until five o’clock, or if I have to leave early, when’s the earliest time that I can drop him off?”

Implications:

- **Time Management**

Time was often mentioned as a challenge around child care.

“Trying to get the kids to the bus and get back in time to catch my bus for work is impossible.”

- **Child care is determining factor for employment selection/status**

Once child care was secured, parents would look for employment based on when they had child care. Mothers state that child care was often the primary scheduling variable that everything else pivoted to accommodate.

Waitlist/Availability

Parents are experiencing long waitlists for quality child care.

“My biggest worry about taking the new job opportunity was child care. Waitlists are insane, especially for the places that have really amazing reviews.”

“I was told, ‘We’ll put you on the waitlist,’ but she’ll be in pre-K before a spot opens up in the daycare rooms.”

“Number one priority was just her safety, happiness and wellbeing and then number two honestly is like availability.”

“There are no spots for infants in Onondaga County

Implications:

- **Limits parent choice**

- **Requires parents to trade availability for quality care**

“I want a facility that I trust but you have to go with what is available.”

- **Subsidy further limits availability**

“I’m having a really hard time finding daycare in my area because nobody in my area will take the DSS-ES.”

- **Further disadvantages minority population in suburbs**

“I live in North Syracuse/Cicero. Okay, all of the daycare centers are filled up for infants. And all of the in home daycares are honestly a bunch of stuck up white women and they don’t understand the process DSS-ES.”

“An important factor, DSS-ES is not normalized in Cicero, North Syracuse.”

What are the Priorities When Looking for Child Care?

Trust

Our interview protocol focused on what parents were looking for in a daycare. We wanted to know what was most important to parents. What were their priorities when searching for daycare? A strong and clear

message was that “trust” was the priority. Before parents consider daycare type (centers or family-owned), location, and activities offered, they must trust the caregiver. Many parents acknowledged waiting until their child could talk before they would consider any child care.

- “It's more so just trusting someone will actually take care of them. Knowing that they're going to take care of him the same way I would; making sure he's eating, making sure he's changed on time.”
- “Me and my husband take care of our kids full time. Don't trust anybody.”

Implications

- **Grandma/Family are often daycare providers**

Grandparents are often first choice for both reasons of cost and trust. Grandparents/great grandmothers were noted to have taken on the role of child care provider, at times giving up their own job to ensure the grandchildren were properly cared for.

“My aunt used to babysit for me, so I didn't have to put him in daycare.”

Safety

Second only to trust, parents prioritized safety. We asked parents what they meant by safety.

“I want to make sure that he is physically okay and that he feels, you know, loved and safe, because hurt people... hurt people, and then once you hurt a kid, I mean, if they carry that into adulthood, it could turn into a monster and I try to make sure that that's not going to happen.”

Location

Location focused on (2) primary factors; accessibility and choice. Location was critically important for those who lacked transportation or who simply wanted their child relatively close to either work or home.

Secondly, those who chose to move out of the city seeking a better life and safer environment felt they lost all of their support.

- “That 11-month-old baby that got shot. I lived one street over and that was right before I had my son so I decided I wanted to move out of the city.”
- “I just don't understand I'm really frustrated because I lost a really major support that I had to a safer area.” [referring to mom's groups, Centering Pregnancy, and caregivers' willingness to accept subsidies as payment.]

Education

Education was often mentioned for those children in the 3-4 year old range, with a few exceptions:

“I'm really big on with him is like education. Even though he's only two, like, my son is very intelligent, and I want to make sure that we continue to encourage that.”

If trust is the #1 priority, how do you choose?

If trust is the number one criterion, how do you go about picking child care? Many of the parents turned to family and friends for referrals/advice. Some did not have that luxury because they were “new in town” or didn't have friends that had children. Ultimately, parents would “trust their gut” or “the spirit would tell them,” but this instinctual approach was often accompanied by watching to see how the caregiver interacted and how their child responded.

- “I actually turned to friends and coworkers to ask if they knew of someone that they would trust that I could get to know.”
- “I found my child care through a mom friend of mine.”
- “Talk to the provider and I can see a lot about their spirit by how the kids are with them. If the kid is standoffish about someone you should listen because they know.”
- “I would be looking at like the surrounding like the environment he's in like making sure like, you know, it's clean. It's neat, looking at where the kids will be sleeping where they will be playing at. And then I would go based off like the teacher how she's greeting how she interacts with kids.”

Magic Wand Question:

If I gave you a magic wand and you could create your child’s child care, with absolutely no limits and no cost to you, what would it look like? What would it feel like?

Many parents’ first response was, “In a perfect world, I would be able to stay home or have my child watched by a family member.” Given time to think, many began to list the things they would like to see:

Environment/Grounds/Safety	Nutrition	Resources Offered
Large outdoor play area, swings	Enough food	Transportation
Indoor gym, pool	3 meals (nutritional) + snacks	Parent Resource Center
Education center	Kitchen	Closet of clothes
Fire extinguishers	Fresh fruit	Food pantry
Background checks	Nutrition classes	Special Education services
Clean, safe, secure with cameras, buzzers to get in		Open 24/7 – all ages
		Provide education

What would it feel like?

“A place where the workers treat the children like they belong to them, observant, childproofed, smoke free area, and they must care. It's a center, so it accommodates ages 0-5 with bassinets, cribs, chairs, computers/laptops, kitchen and fresh fruit and veggies, place they can play/run and get out that extra energy outside. “

- “Being able to trust staff.”
- “Knowing my child is in good hands.”
- “I can get to her quickly/easily. Interactive engaging, homey feel.”
- “Boys and girls can do things together. Gender fluid, you can play with truck as girls, boys can cook.”

What about the caregivers?

- “Wants someone with compassion, not just someone wanting a paycheck.”

- “Someone that knows how to manage and work with children.”
- “Diverse group of kids and providers.”
- “My son is autistic; I need someone who understands him.”
- “I want it [child care] to be in the community, welcoming, full of familiar faces, no outsiders, knows the kids, offers transportation, learning center, playing center, field centers, secure, buzzer, no one can just walk in. provided meals, closet of necessities, clothes, pantry, safe place for a parent as well. Serve the parent resources where parents needs are met.”

What parents want for caregivers:

Parents understand that to have quality child care, we need to compensate and treat caregivers in a manner that makes them feel valued.

- “They don’t get paid well and turnover is high. We need a ready and able staff organization. They need to be paid better. We should create a space for teachers too, maybe a sauna to build incentive and provide care for teachers on break.”

Survey Results

Respondent Demographic Information, n=362

How old are your children?

	Birth - 18 months	19 - 36 months	37 months - 4 years	5 - 12 (in school)
Child #1	81	80	109	89
Child #2	40	54	56	65
Child #3	10	11	9	29
Child #4	1	3	8	3
Child #5	0	0	1	4
Child #6	0	1	0	0
	132	149	183	190

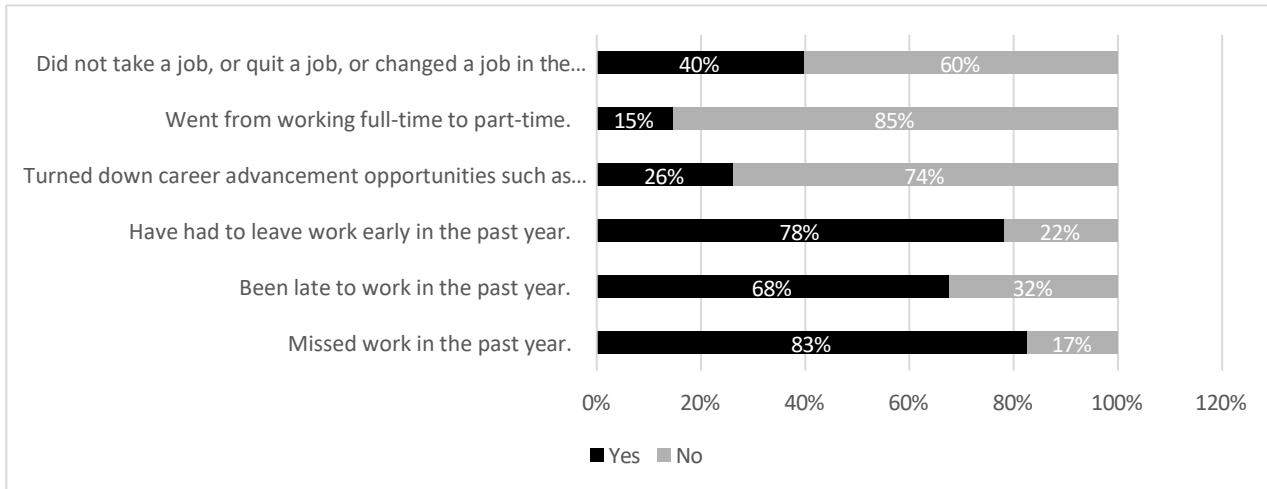
Zip code (home):

Zip Code	Survey Participants
Baldwinsville	48
Brewerton	8
Bridgeport	2
Camillus	19
Cicero	17
Clay	11
East Syracuse	7
Fabius	1
Fairmount	14
Fayetteville	10
Jamesville	5
Jordan	1
Kirkville	4
Lafayette	2
Liverpool	51
Manlius	11
Marcellus	1
Mariette	1
Mattydale	2
Minoa	1
Nedrow	3
Skaneateles	12
Solvay	7
Syracuse	98
Warners	2
	338

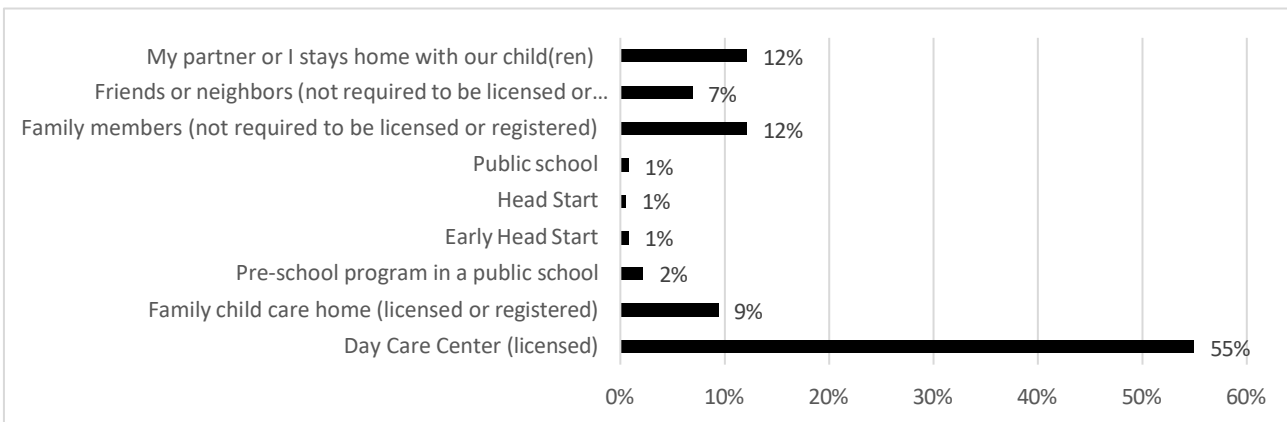


**38 OUT OF 45
ONONDAGA
COUNTY ZIP
CODES ARE
REPRESENTED**

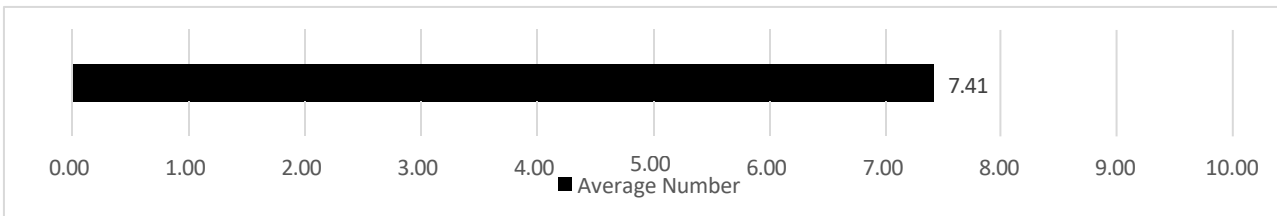
Please tell us if you (or your co-parent/partner/spouse/another adult in your family) has experienced any of the following because of child care problems:



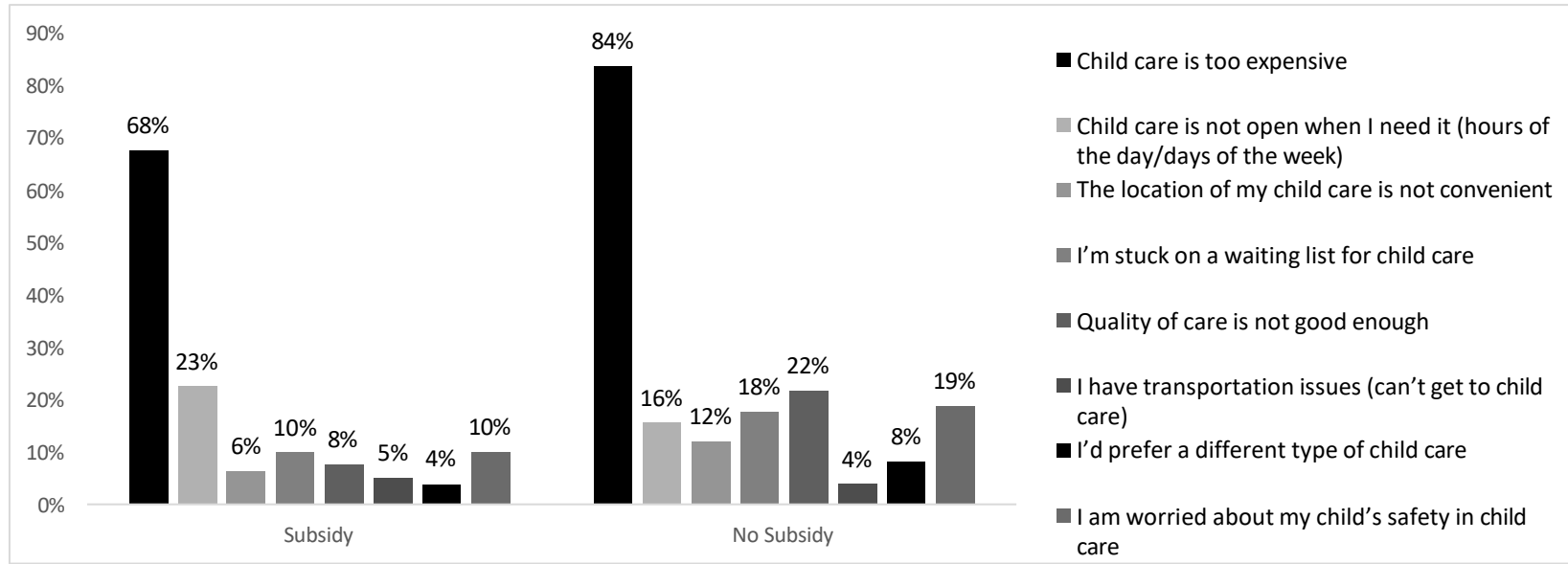
For your children under the age of 5: What form of child care do you use most of the time? Check one.



On a scale of 1-10, with 1 being the least happy and 10 being the most happy, how happy are you with your current child care arrangement?



What are your biggest problems with child care? Please choose your top 3.



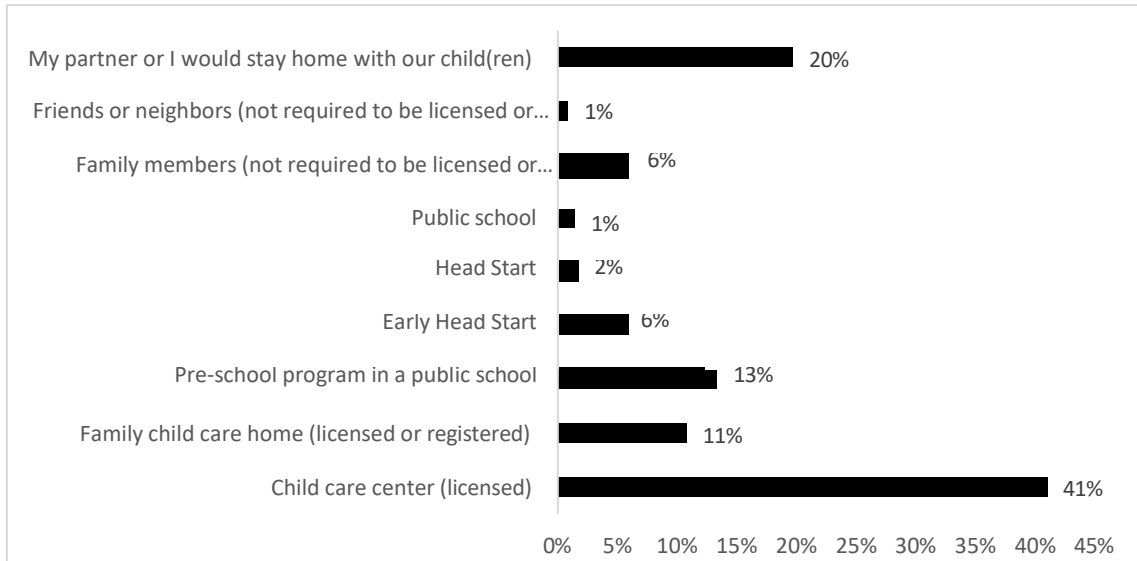
This question was disaggregated by those receiving a subsidy and those who were not receiving a subsidy to illuminate how the current child care climate presents challenges for these two subgroups of parents. The cost of child care ranked #1 for both groups; 84% of those who do not receive a subsidy identified cost as one of their greatest challenges, while those receiving a subsidy identified cost to a lesser degree (68%).

	#1 Challenge	#2 Challenge	#3 Challenge
No Subsidy	Too expensive	Quality of care not good enough	Safety concerns
Subsidy	Too expensive	Hours accessible	Waiting list/Safety

Notable:

- The top (3) concerns for parents receiving subsidies are related to cost and access.
- The top (3) concerns for parents not receiving subsidies are related to cost and quality of care.
 - “Quality of care” ranks #2 with parents with no subsidy and #5 for those receiving subsidies.

If you could wave a magic wand and create your perfect child care, what would it look like? What setting would you choose? (Choose one)



What location would you choose? (choose one)

Child care would be located near my (or my partner's) work	22%
Child care would be located near my home	78%

In the last year have you received a subsidy (payment) from the government to help pay for child care?

Yes	22%
No	78%

What was your annual household income before taxes in 2021 (estimate the income of everyone who lives in your household)?

Less than \$20,000	3%
\$20,000 to \$34,999	8%
\$35,000 to \$49,999	8%
\$50,000 to \$74,999	17%
\$75,000 to \$99,999	16%
\$100,000 or more	45%
Unsure	3%