

Child Care Market Analysis

Clinton and Camanche, Iowa

December 2023

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INTRODUCTION

In 2023, First Children's Finance was commissioned by Grow Clinton to conduct this *Child Care Market Analysis*. This analysis provides relevant child care data, child care market analysis, and First Children's Finance's key findings of the child care market in the Clinton and Camanche area.

The data in this report has been collected from three original surveys developed by First Children's Finance along with data published by the US Census Bureau, US Department of Health and Human Services, Iowa Workforce Development, Iowa Department of Health and Human Services, and Iowa Child Care Resource & Referral. This analysis is First Children's Finance's professional interpretation of the data available as of the date of this report. The information and analysis presented in this document are intended to provide a basis for sound business and community planning decisions, but no warranty is stated or implied as to completeness or accuracy.

PUTTING THIS STUDY INTO USE

This report can be used by employers and other community members that may be considering recruiting or adding new child care businesses, to better understand what parents most prefer for settings and offerings. It can also be used by both existing and future child care programs to understand the families wanting child care and to make operational decisions, such as what ages to care for, hours of operation, and understanding what factors are important to parents.

EXECUTIVE SUMMARY

For the purpose of this *Child Care Market Analysis*, the child care market area is defined as the 52732–zip code which includes the city limits of Clinton and the adjacent unincorporated areas, the 52730–zip code which includes the city limits of Camanche and the adjacent unincorporated areas, and the 52701–zip code which includes the city of Andover and is completely surrounded by the 52732–zip code. The market area is located in Clinton County in eastern Iowa.

The US Census Bureau estimates both total population and the number of children ages 0 to 11 in the market area have declined over the last 10 years. As of 2021, the total population is 31,351 and the total number of children ages 0 to 11 is 4,408. Taking into consideration the data collected through this study, First Children's Finance estimates there are 2,681 children whose families prefer and would be likely to use an Iowa Department of Health and Human Services regulated child care setting, either a licensed child care center or registered child development home.

In all 3 zip codes, the average family size is just under 3 people. The median annual income for families with children under the age of 18 ranges from \$60,645 in Clinton to \$96,602 in Camanche. According to Iowa Workforce Development, as of Quarter 1 of 2023, there are an average of 19,079 people employed by companies in Clinton County, and the average weekly wage among those workers is \$991. The industry that employs the most people is manufacturing and the average weekly wage in that industry is \$1,513.

A key part of this analysis was a survey to gain input from parents on their child care needs and preferences, compared to the current supply. Of the parents that participated, 56 reported they currently have children ages 12 or younger and they want to use child care within either Clinton or Camanche. Using the most popular responses, a parent would be described as married (79%) and living in Clinton zip code (52732) (67%). They work first-shift Monday through Friday (89%) in Clinton or Camanche (91%), and the nature of their job is finance & insurance (23%). Their spouse also works first-shift Monday through Friday (64%) in Clinton or Camanche (68%), and the nature of their job is other services (30%). They currently use child care in Clinton (80%), Monday through Friday. They use child care 40 to 49 hours per week for younger children (39%), less than 10 hours per week for before and after school care (64%), and 40 to 49 hours per week for school age children during the summer (32%). They are satisfied with their current child care provider (84%).

For working parents, choosing child care may be one of the most critical decisions they make. According to longitudinal research, the child care environment parents choose will have lasting effects on their child. When there are not enough child care spaces in a community, finding *any* care is a challenge; and options for *quality* care that meet the needs and preferences of families can be even more challenging.

There are several forms of early care and education available in Iowa to meet family's varying needs and preferences. The educational experiences are different for each type of care and most communities desire to have multiple types of care and education available. Through a child care needs survey developed by First Children's Finance and conducted in the market area in 2023, it was determined that most of the parents that are likely to use "outside" care want their child in a setting that is regulated by the Iowa Department of Health and Human Services. The most preferred child care setting of parents is a licensed child care center.

Iowa Department of Health and Human Services (HHS) data shows that as of November 2023 there are 1,314 regulated spaces in Clinton and Camanche, with 1,094 of those spaces available year-round and 220 spaces available during the school year only. There are enough year-round spaces to serve approximately 41% of the children whose parents are likely to use regulated child care. That means the child care gap in the market area could be as high as 1,587 spaces, with the greatest gap among school age, followed by infant and toddler.

Key Findings of This Analysis

Complete details of these key findings are contained in this report. These key findings are based on research and conditions of the child care market at a specific point in time. If the community or the child care environment changes significantly, these findings may be affected.

Finding 1: Median Household Incomes Exceed Child Care Assistance Eligibility Threshold

The median annual income for families with children under the age of 18 is \$60,645 in Clinton and \$96,602 in Camanche. The median annual income for a family with children that is headed by a married couple is \$72,321 for Andover. To be initially eligible for the Iowa Child Care Assistance (CCA) program a family's income must not exceed 160% of Federal Poverty Level (FPL), or 200% if they have a child with special needs. According to the poverty threshold that went into effect in January 2023, 160% FPL is equivalent to \$39,776 for a household of 3, and \$48,000 for a household of 4. While many families with children in market area exceed these incomes, it is possible they still struggle to pay child care expenses out of pocket.

Finding 2: There is a Significant Difference Between Average Weekly Tuition of Licensed Centers and Registered Homes

As of November 2023, the difference in average weekly tuition for children ages 0 to 2 and ages 4 to 5 in a licensed center vs. a registered home is approximately \$50, with the center being higher than a registered home. Meanwhile, the difference in average weekly tuition for age 3 and full-time care for school age children is \$20 to \$30, with the center again higher than a home. The difference in average weekly tuition for before and after

school care is the largest, with centers approximately \$75 per week more than registered homes.

Finding 3: Parents Want Year-Round Care in a Licensed Center

Through the child care needs surveys parents were asked several questions about their child care needs and preferences. The most preferred child care arrangement is a licensed child care center, which is preferred by 62%. In addition, a majority of parents (87%) with children ages 0 to 5, but not in kindergarten, indicate they prefer year-round care. When it comes to parents with school age children the majority (54%) still prefers year-round care.

Finding 4: There is a Shortage of Child Care Spaces Among Some Age Groups

There are 4,408 children ages 0 to 11 in the market area. Of those, First Children's Finance (FCF) estimates 3,395 have all parents working. Based on the percentage of families that have all parents working, and parents' preferences of child care settings, First Children's Finance estimates that approximately 2,681 of those children are from families who prefer and are likely to use an Iowa Department of Health and Human Services (HHS) regulated child care setting. According to Iowa HHS, there are 1,314 regulated spaces, of which 1,094 are available year-round. That means the child care gap could be as high as 1,587 spaces: 237 spaces for ages 0 to 2 and 1,428 spaces for school age children. There appears to be a surplus of spaces for preschool age children, with 395 children and 473 year-round spaces.

Finding 5: Parents Indicate Child Care Challenges are Affecting their Job

Over the last 12 months, parents have experienced child care challenges that have in turn affected their job. The adverse effects experienced by at least one-quarter of the parents were: had to leave work early (53%), missed a day of work because the provider was closed on vacation, or not available (35%), and had to supervise a child while working from home (33%).

Finding 6: Employers are having Difficulty Hiring Due to Child Care

Through the child care needs survey conducted as part of this study, employers were asked if they had experienced difficulty hiring due to child care options or challenges. Thirty-seven percent (37%) indicated they had, while an additional 26% were unsure.

Finding 7: Child Care Centers are having Difficulty Hiring Staff

Through the child care needs survey conducted as part of this study, child care indicated that during the previous 12 months, a total of 30 employees had departed, either

voluntarily or involuntarily. Of those positions, 14 were full-time and 16 part-time. Currently there are 6 vacant positions, 2 full-time and 4 part-time. When asked how hiring staff had been over the past 12 months, 1 center indicated it was somewhat difficult, while the other 2 centers indicated it was very difficult.

MARKET DESCRIPTION

Market Area

For the purpose of this *Child Care Market Analysis* the child care market area is defined as the 52732–zip code which includes the city limits of Clinton and the adjacent unincorporated areas, the 52730–zip code which includes the city limits of Camanche and the adjacent unincorporated areas, and the 52701–zip code which includes the city of Andover and is completely surrounded by the 52732–zip code. The market area is located in Clinton County in eastern Iowa.

Population and Demographics

Population

According to the US Census Bureau the total population of the market area has declined over the last 10 years. Both Camanche and Andover have seen increases, while Clinton has experienced a decrease. As of 2021 the population of the Camanche area (52730–zip code) is 5,152, a net change of +292 since 2011 when the population was 4,860. When it comes to the Clinton area (52732–zip code), the population is 26,077, a net change of –2,544 since 2011, and for the Andover area (52701–zip code) the population is 122, a net change of +4 since 2011.

Table 1: Population Change

	2011	2021	Net Change
Camanche area (52730 zip code)	4,860	5,152	+292
Clinton area (52732 zip code)	28,621	26,077	–2,544
Andover area (52701 zip code)	116	122	+4
Market Area Total	33,597	31,351	–2,246

Note: Data from US Census Bureau (2011, 2021)

Fertility

Fertility reflects how many women give birth each year and may be helpful to give an estimate of how many babies are born each year. It must however be recognized that a single birth may result in more than one child, and there are circumstances where the new born child may not live within the community after the birth. As of 2021 there are 6,274 women ages 16 to 50 living in the market area. The US Census Bureau estimates that 7% (437 women) gave birth in the prior 12–month period, while 4% (238 women) both gave birth and are in the labor force. These percentages vary by community within the market area. *See table on next page.*

Table 2: Fertility

	Women 16–50	Gave Birth	% Gave Birth	Gave Birth and In Labor Force	% Gave Birth and in Labor Force
Camanche area	1,106	25	2%	25	2%
Clinton area	5,129	406	8%	211	4%
Andover area	39	6	15%	2	5%
Market Area Total	6,274	437	7%	238	4%

Note: Data from US Census Bureau (2021)

Children Ages 0 to 11

As of 2021 the number of children ages 0 to 11 living in the market area is 4,408, which is a net decrease of 835 since 2011. The area with the greatest number of children is Clinton, where there are 3,471 children, followed by Camanche with 895 children, and Andover with 42 children. From 2011 to 2021 there were net increases in Camanche (+342) and Andover (+13), while there was a net decrease in Clinton (–1,190).

Table 3: Population Ages 0 to 11

Community	2011	2021	Net Change
Camanche Area			
Age 0 to 5	274	392	+118
Age 6 to 11	279	503	+224
Total Ages 0 to 11	553	895	+342
Clinton Area			
Age 0 to 5	2,154	1,821	–333
Age 6 to 11	2,507	1,650	–857
Total Ages 0 to 11	4,661	3,471	–1,190
Andover Area			
Age 0 to 5	11	23	+12
Age 6 to 11	18	19	+1
Total Ages 0 to 11	29	42	+13
Total Market Area			
Age 0 to 5	2,439	2,236	–203
Age 6 to 11	2,804	2,172	–632
Total Ages 0 to 11	5,243	4,408	–835

Note: Data from US Census Bureau (2011, 2021)

Race

Being aware of the racial composition of the community can help child care owners and operators provide child care that is inclusive and welcoming to all families. Within the market area, most of the population is one race, with the majority being White (90%). Other races that

are present include Black or African American, American Indian or Alaska Native, Asian, and Some Other Race. The following table shows the racial composition for the individual communities.

Table 4: Race

	Camanche		Clinton		Andover		Market Area	
Total Population	5,152	100%	26,077	100%	122	100%	31,351	100%
One Race	5,023	97%	24,830	95%	122	100%	29,975	96%
White	5,003	97%	23,212	89%	122	100%	28,337	90%
Black or African American	0	0%	1,272	5%	0	0%	1,272	4%
American Indian or Alaska Native	20	0%	117	0%	0	0%	137	0%
Asian	0	0%	148	1%	0	0%	148	0%
Native Hawaiian or Other Pacific Islander	0	0%	0	0%	0	0%	0	0%
Some Other Race	0	0%	81	0%	0	0%	81	0%
Two or More Races	129	2.5%	1,247	5%	0	0%	1,376	4%

Note: Data from US Census Bureau (2021)

Hispanic or Latino

Being aware of the cultures within the community can help child care owners and operators create an inclusive child care program that recognizes and welcomes families from different cultures. As of 2021, there are residents in both Camanche and Clinton that are Hispanic or Latino. The largest group for each community is Mexican with 0.2% of the population in Camanche and 4.4% of the population in Clinton. There are no Hispanic or Latino residents in Andover.

Table 5: Hispanic or Latino Origin by Specific Origin

	Camanche		Clinton		Andover		Market Area	
Total Population	5,152	100%	26,077	100%	122	100%	31,351	100%
Hispanic or Latino (of any race)	11	0%	1,156	4%	0	0%	1,167	4%
Mexican	11	0%	769	3%	0	0%	780	2%
Puerto Rican	0	0%	93	0%	0	0%	93	0%
Cuban	0	0%	61	0%	0	0%	61	0%
Costa Rican	0	0%	0	0%	0	0%	0	0%
Guatemalan	0	0%	0	0%	0	0%	0	0%
Nicaraguan	0	0%	0	0%	0	0%	0	0%
Panamanian	0	0%	8	0%	0	0%	8	0%
Salvadoran	0	0%	0	0%	0	0%	0	0%
Spaniard	0	0%	127	0%	0	0%	127	0%
Spanish	0	0%	0	0%	0	0%	0	0%
All Other Hispanic or Latino	0	0%	98	0%	0	0%	98	0%

Note: Data from US Census Bureau (2021)

Language Spoken at Home

It can be helpful to look at what languages are spoken within a community to determine if there may be barriers for parents that want to use child care but do not speak English. In the Camanche area 0.5% of residents speak a language other than English at home. After English, the most common language spoken at home is Other Language, which is spoken at home by 0.3% of the population. Among the 26 residents of Camanche that speak a language other than English at home, 58% (15 people) also speak English very well. In the Clinton area 2.4% of residents speak a language other than English at home. After English, the most common language spoken at home is Spanish, which is spoken at home by 1.6% of the population. Among the 585 residents of Clinton that speak a language other than English at home, 70% (412 people) also speak English very well. In the Andover area no residents speak a language other than English at home.

Table 6: Language Spoken at Home

	Camanche		Clinton		Andover		Market Area	
Population Age 5 and older	4,798	100%	24,612	100%	100	100%	29,510	100%
Speaks Only English	4,772	95.5%	24,033	97.6%	100	100%	28,905	98%
Speaks Language Other than English	26	0.5%	585	2.4%	0	0%	611	2%
Spanish	0	0.0%	395	1.6%	0	0%	395	1%
Other Indo-European Language	11	0.2%	54	0.2%	0	0%	65	0%
Asian and Pacific Islander Languages	0	0.0%	93	0.4%	0	0%	93	0%
Other Languages	15	0.3%	43	0.2%	0	0%	58	0%
Speaks Language Other than English	26	100%	585	100%	0	0%	611	100%
Speaks English Very Well	15	58%	412	70%	0	0%	427	70%
Speaks English Less than Very Well	11	42%	173	30%	0	0%	184	30%

Note: Data from US Census Bureau (2021)

Educational Attainment

The education level of parents may influence their job choice or the industry they work in, which in turn determines their child care needs. According to the U.S. Census Bureau, the majority of population in Camanche age 18 to 24 has some college or an associated degree or higher (51%), while the largest group of population 25 and older is a high school graduate (42%). In Clinton, the population age 18 to 24 is split almost equally between being a high school graduate (42%) and having some college or an Associate's Degree (43%), while the largest group among adults age 25 and older is a high school graduate (38%). In Andover, there is only 1 resident age 18 to 24 and that resident has less than a high school diploma (100%), while the majority of those age 25 and older is a high school graduate (51%). See table on next page.

Table 7: Educational Attainment

	Camanche		Clinton		Andover		Market Area	
Total Population 18-24	335	100%	1,901	100%	1	100%	2,237	100%
Less than High School	0	0%	187	10%	1	100%	188	8%
High School Graduate, or equivalent	155	46%	796	42%	0	0%	951	43%
Some College or Associate's Degree	170	51%	815	43%	0	0%	985	44%
Bachelor's Degree or Higher	10	3%	103	5%	0	0%	113	5%
Total Population age 25+	3,626	100%	18,628	100%	67	100%	22,321	100%
Less than High School	86	2%	2,030	11%	2	3%	2,118	9%
High School Graduate, or equivalent	1,528	42%	7,022	38%	34	51%	8,584	38%
Some College or Associate's Degree	1,262	35%	5,882	31%	25	37%	7,169	32%
Bachelor's Degree or Higher	750	21%	3,694	20%	6	9%	4,450	20%

Note: Data from US Census Bureau (2021)

Working Families

As of 2021 there are 13,215 total households in the market area, of which 7,925 are family households, and 3,025 have children under 18. The average household size varies by community, ranging from 2.24 people in Camanche up to 2.71 people in Andover, while the average family household size ranges from 2.75 people in Andover to 2.96 people in Clinton. Over one-half of all households in the market area are family households (60%), while just under one-quarter of all households (23%) have children under the age of 18.

The median income¹ for all households in each of the communities is lower than the median household income for families, and the median household income for families is lower than the median income for families that have children, especially if the family is headed by a married couple.

When it comes to working parents, Andover has the lowest percentage of families with parents in the labor force, with 26% of families with children ages 0 to 5 and 48% of families with children ages 6 to 17 have all parents in the labor force. Camanche has the highest percentage of families with all parents in the labor force, with 96% of families with children ages 0 to 5 and 95% of families with children ages 6 to 17 have all parents in the labor force. And Clinton is in the middle with 68% of families with children ages 0 to 5 and 78% of families with children ages 6 to 17 have all parents in the labor force. All parents in the labor force means if there are two parents in the home, they both work, or if there is a single parent that parent is working. See table on the next page.

¹ Median income is the amount which divides the income distribution into two equal groups, half having income above that amount, and half having income below that amount.

Table 8: Families and Households

	Camanche Area	Clinton Area	Andover Area
Total Households	2,370	10,863	45
Average household size	2.24	2.35	2.71
Median household income	\$56,029	\$51,297	---
Family Households	1,489	6,392	44
Average family size	2.87	2.96	2.75
Median family income	\$77,896	\$66,118	---
Family Households w/children under 18	603	2,384	38
<i>Married couples</i>	491	1,433	15
<i>Male householder (no spouse present)</i>	8	240	3
<i>Female householder (no spouse present)</i>	104	711	20
Median income for families w/children under 18	\$96,602	\$60,645	---
<i>Median family income married couples</i>	\$101,612	\$103,770	\$72,321
<i>Median family income male (no spouse present)</i>	---	\$45,750	---
<i>Median family income female (no spouse present)</i>	\$53,897	\$20,023	---
Households w/children ages 0 to 5	392	1,612	23
Households w/children ages 0 to 5, and all parents in labor force	376	1,102	6
Percent households w/ages 0 to 5, and all parents in labor force	96%	68%	26%
Households w/children ages 6 to 17	784	3,408	31
Households w/children ages 6 to 17, and all parents in labor force	744	2,668	15
Percent households w/ ages 6 to 17, and all parents in labor force	95%	78%	48%

Note: Data from US Census Bureau (2021)

Economy in the Area

Labor Force and Unemployment

A competitive job market can make it hard for child care programs to attract and retain quality staff. According to Iowa Workforce Development, as of September 2023 the total labor force (residents age 16 or older that are choosing to participate in the workforce) living in Clinton County is 22,520 (data by individual cities is not available). Of those, 21,680 are employed, while 850 (3.8%) are unemployed. In comparison, in September 2018 the total labor force was 22,680 with 22,050 employed, and 640 (2.8%) unemployed. This data indicates that the labor force has decreased by 1,000 workers, meaning there are fewer people to fill jobs than there were 5 years ago.

Place of Work and Time Leaving Home

According to the US Census Bureau as of 2021, there is a total of 13,884 workers age 16 and over living in the market area, and most of those work within Clinton County. The most popular hour for residents of Clinton and Andover to leave home to go to work is 6:00 am to 6:59 am, while the most popular hour for residents of Camanche is 7:00 am to 7:59 am. The mean travel time is approximately 19 minutes for residents of all 3 communities. The table below shows a breakdown of data by each community.

Table 9: Place of Work and Time Leaving Home to Go to Work

	Camanche Area	Clinton Area	Andover Area
Total workers 16 years and over	2,502	11,306	36
Workers who work from home	4.6%	4.1%	8.3%
<i>Time leaving home to go to work</i>			
12:00 am to 4:59 am	4.7%	8.8%	3.0%
5:00 am to 5:29 am	1.0%	6.6%	9.1%
5:30 am to 5:59 am	3.4%	5.3%	6.1%
6:00 am to 6:29 am	4.4%	9.9%	12.1%
6:30 am to 6:59 am	11.5%	10.0%	18.2%
7:00 am to 7:29 am	24.8%	9.2%	12.1%
7:30 am to 7:59 am	17.1%	12.0%	0.0%
8:00 am. to 8:29 am	5.0%	5.8%	0.0%
8:30 am to 8:59 am	5.3%	3.7%	18.2%
9:00 am to 11:59 pm	22.8%	28.9%	21.2%
Mean travel time (minutes)	18.8 mins.	18.7 mins.	19.2 mins.
<i>Place of Work</i>			
Within county of residence	79.9%	78.7%	77.8%
Outside county of residence	14.0%	9.4%	13.9%
Outside Iowa	6.1%	11.8%	8.3%

Note: Data from US Census Bureau (2021)

Employees and Wages

According to Iowa Workforce Development, as of Quarter 1 of 2023, there is an average 19,079 people employed by companies located in Clinton County, which is a decrease of 1,272 from the same period 5 years ago, in 2018. The average weekly wage of those working at these companies is \$991, up from \$796 in 2018. Of all the industries based in Clinton County, the industry that employs the most people on average is manufacturing (4,547), followed by retail trade (2,275). The average weekly wages for manufacturing are \$1,513, while retail trade is \$616. Overall, average wages range from a low of \$297 per week for arts, entertainment & recreation, to a high of \$2,171 per week for utilities. *See the table on the next page.*

Table 10: Employees and Wages for Clinton County

	Q1 2018			Q1 2023		
	Total Locations	Average Employees	Avg. Wk. Wage	Total Locations	Average Employees	Avg. Wk. Wage
Accommodations & Food Service	108	1,603	\$287	115	1,608	\$354
Administrative & Waste Management	70	1,414	\$432	90	955	\$606
Agriculture, Fishing & Hunting	22	126	\$648	23	122	\$812
Arts, Entertainment & Recreation	24	215	\$246	24	176	\$297
Construction	137	653	\$902	124	662	\$1,105
Educational Services	38	1,990	\$682	40	1,836	\$738
Finance & Insurance	80	655	\$1,193	79	559	\$1,408
Health Care & Social Assistance	199	3,259	\$704	265	2,860	\$969
Information	25	455	\$706	27	235	\$785
Management of Companies	13	68	\$1,553	21	165	\$1,729
Manufacturing	64	4,446	\$1,335	73	4,547	\$1,513
Mining, Quarrying, & Oil & Gas	2	---	---	---	---	---
Other Services (except Public Admin)	141	391	\$470	94	350	\$695
Professional, Scientific, Technical	75	415	\$666	99	487	\$851
Public Administration	38	689	\$892	38	718	\$952
Real Estate, Rental, Leasing	38	118	\$643	40	119	\$1,117
Retail Trade	170	2,454	\$472	147	2,275	\$616
Transportation & Warehousing	82	899	\$828	79	959	\$1,096
Utilities	6	96	\$1,635	5	59	\$2,171
Wholesale Trade	80	405	\$981	71	387	\$1,428
Total	1,412	20,351	\$796	1,454	19,079	\$991

Note: Data from Iowa Workforce Development (2108, 2023)²

Child Care and Preschool Workforce and Wages

Most child care and preschool workers fall under one of three categories as defined by the US Office of Management and Budget (OMB) Standard Occupational Classification (SOC) system: Childcare Workers³, Education and Childcare Administrators, Preschool and Daycare⁴, or Preschool Teachers, Except Special Education⁵.

² Sectors without data are non-disclosable. Grand totals for all sectors will not necessarily equal the total due to data suppression for certain areas and sectors that don't pass confidentiality restrictions.

³ SOC Definition: Attend to children at schools, businesses, private households, and childcare institutions. Perform a variety of tasks, such as dressing, feeding, bathing, and overseeing play. Illustrative examples: Au Pair, Daycare Provider, Nanny.

⁴ SOC Definition: Plan, direct, or coordinate academic or nonacademic activities of preschools or childcare centers and programs, including before- and after-school care. Illustrative examples: Childcare Center Administrator, Head Start Director, Preschool Director.

⁵ SOC Definition: Instruct preschool-aged students, following curricula or lesson plans, in activities designed to promote social, physical, and intellectual growth. Illustrative examples: Home-based Preschool Teacher, Nursery School Teacher, Preschool Head Start Teacher.

According to Iowa Wage Report Data from Iowa Workforce Development (IWD) for Mississippi Valley Local Workforce Area⁶ for 2022, the entry wage⁷ for Childcare Workers in the region is \$8.40 per hour, while the mean⁸ wage is \$10.46 per hour and experienced wage⁹ is \$11.50 per hour. There are 420 of these workers in the region, and 5,250 across the state.

For Education and Childcare Administrators, Preschool and Daycare in the workforce region, the entry wage is \$14.25 per hour, the mean wage \$21.92 per hour, and experienced wage \$25.76 per hour. There are 110 of these workers in the region, and 1,170 across the state.

For Preschool Teachers, Except Special Education, the entry wage in the area is \$10.28 per hour, the mean wage \$18.77 per hour, and experienced wage \$23.01 per hour. There are 620 of these workers in the region, and 5,370 across the state.

Table 11: Local Workforce Area Childcare and Preschool Workforce and Wages

	Total Jobs in Region	Total Jobs Statewide	Entry Wage	Mean Wage	Experienced Wage
Childcare Workers	420	5,250	\$8.40	\$10.46	\$11.50
Education & Childcare Admin, Preschool & Daycare	110	1,170	\$14.25	\$21.92	\$25.76
Preschool Teachers, Except Special Education	620	5,370	\$10.28	\$18.77	\$23.01

Note: Data from Iowa Workforce Development (2022)

⁶ Mississippi Valley Local Workforce Area- Aggregate data for the counties of Clinton, Des Moines, Henry, Jackson, Lee, Louisa, Muscatine, Scott.

⁷ Entry Wage is the average of the lowest third of reported wages for the occupation.

⁸ Mean Wages is the average wage and is computed by dividing the estimated total wage for an occupation by its weighted employment.

⁹ Experienced Wage is the average of the upper two-thirds of reported wages for the occupation.

EARLY CARE AND EDUCATION

Early Care and Education Environments in Iowa

There are several forms of early care and education available in Iowa to meet each family's varying needs and preferences. These include:

- Licensed Child Care Centers and Preschools
- Head Start and Early Head Start
- School-Based Programs
 - School-Age Care
 - Statewide Voluntary Preschool Program
- Registered Child Development Homes
- Legal Unregulated Home Care
 - Nanny or Au Pare
 - Family, Friend or Neighbor care

The educational experiences are different for each type of care and most communities desire to have multiple types of care and education available.

Iowa Department of Health and Human Services¹⁰

In Iowa, the Department of Health and Human Services (HHS), formerly Iowa Department of Human Services (DHS), oversees programs that fall into three categories—Licensed Centers, Registered Child Development Homes, and Child Care Homes. The level of regulation and requirements placed on the provider varies based on the type. *See table starting on page 20 for a side-by-side comparison.*

Licensed Centers

Licensed Centers include child care centers (including child care programs operated by school districts), preschool programs, and Head Start. A center can care for larger groups of children, which are typically separated by age groups according to specific staff-to-child ratios. All centers are required to have an Iowa HHS inspection prior to opening and an annual inspection

¹⁰ Information in this section adapted from “Child Care Overview”. Iowa Department of Health and Human Services. <https://hhs.iowa.gov/childcare/overview>.

after that. A licensed center may apply for a Child Care Assistance¹¹ Provider Agreement and may participate in the voluntary Iowa Quality for Kids (IQ4K) quality rating system¹².

Registered Child Development Homes (a.k.a. Registered Homes)

Anyone caring for more than 6 children at a time is required to register with the Iowa Department of Health and Human Services. Registered child development homes can provide care for up to 8, 12 or 16 children at a time depending on the registration level and the ages of the children present at any given time¹³. Registration levels A, B, or C are based on the providers' experience and if there are any assistants or co-providers present. These programs are required to have an Iowa HHS inspection prior to opening and an unannounced annual inspection after that. A registered child development home may apply for a Child Care Assistance Provider Agreement with HHS and may participate in the voluntary ChildNet¹⁴ program and IQ4K.

Child Care Homes

Child Care homes can care for 6 or fewer children at any given time. These programs are not required to register but have the option to do so. A Child Care Home may apply for a Child Care Assistance Provider Agreement with HHS. Child Care Homes serving children eligible for child care assistance must complete an unannounced inspection once per year to assure compliance with health, safety, and fire standards. These providers are not eligible to participate in ChildNet or IQ4K.

¹¹ Child Care Assistance (CCA) is a tuition assistance program available to children of income-eligible parents. The tuition reimbursement is paid directly to the child care program based on the child's attendance.

¹² IQ4K is voluntary rating system for Licensed Centers and Preschools, Registered Child Development Homes, Head Start programs, and child care programs that are operated by school districts. Participating providers achieve a rating on a scale of 1 to 5, by meeting key indicators of quality in the areas of nutrition & physical activity, professional development, leadership & administration, family & community partnerships, environment, teaching staff qualifications, and teaching & learning for centers, and the areas of nutrition & physical activity, professional development, family & community partnerships, environment, provider qualifications, and teaching & learning for homes.

¹³ When there are children 24 months or younger, the provider may not be able to care for the maximum number of children they are approved for.

¹⁴ ChildNet certification is a requirement for Child Care Home providers wishing to achieve a Level 2 and higher in the Iowa Quality Rating System. To earn ChildNet certification, the provider must complete the ChildNet training series with Iowa Child Care Resource & Referral (CCR&R), enroll in the Child and Adult Care Food Program, and demonstrate 100% compliance with the Iowa Department of Human Services' Registration checklist through a certification visit with their local CCR&R Child Care Consultant.

Table 12: HHS Requirements for Child Care Providers in Iowa

	Non-Registered Home w/out HHS agreement	Non-Registered Home w/HHS agreement	Child Development Home A	Child Development Home B	Child Development Home C (1 provider)	Child Development Home C2 (2 providers)	Licensed Center
State Regulated	No	Yes	Yes	Yes	Yes	Yes	Yes
Maximum Capacity ¹⁵	6	6	8	12	8	16	Varies by license
Inspection prior to Registration/Licensing			•	•	•	•	•
Annual Facility & Records Inspection		•	•	•	•	•	•
Minimum age of caregiver		18 years	18 years	20 years	21 years	21 years	Lead teacher 18 years
Iowa child abuse registry check ¹⁶		•	•	•	•	•	•
Iowa criminal records check ⁷		•	•	•	•	•	•
National (FBI) Fingerprint-based records check		•	•	•	•	•	•
Experience required				2 years or 1 year w/child related degree	5 years or 4 years w/child related degree	5 years or 4 years w/child related degree	Combination of experience and education
Minimum education required				High school or GED	High school or GED	High school or GED	Director/ On-Site Supervisor High school or GED
Minimum pre-service & orientation trainings		•	•	•	•	•	•
Professional Development (every 2 years)		6 hours	24 hours	24 hours	24 hours	24 hours	
CPR and First Aid Certification		•	•	•	•	•	•
Mandatory Reporter Training		•	•	•	•	•	•
Emergency Preparedness Response Training		•	•	•	•	•	•

¹⁵ A home provider's own children are included in their legal capacity. Their school-age children are not unless they are being home-schooled.

¹⁶ Iowa child abuse registry and Iowa criminal records checks are required for all household members age 14 and older.

	Non-Registered Home w/out HHS agreement	Non-Registered Home w/HHS agreement	Child Development Home A	Child Development Home B	Child Development Home C (1 provider)	Child Development Home C2 (2 providers)	Licensed Center
Non-smoking environment		•	•	•	•	•	•
Fire-extinguishers and smoke detectors		•	•	•	•	•	•
2 direct exits				•	•	•	•
Space requirements				•	•	•	•
Quiet area for sick children				•	•	•	•
Reference letters			3 letters of reference				

Adapted from: Iowa Department of Human Services (2011)

<https://ccmis.dhs.state.ia.us/providerportal/ChildCareRequirements.aspx>.

Additional HHS Requirements for Child Care Providers in Iowa

- Non-Registered Homes may have up to 6 children, as long as at least one child is school-aged.
- Child Development Home A: Limit of 6 preschool children with a maximum of 4 aged 24 months or younger. Of these, no more than 3 can be 12 months of age or younger. They can also care for 2 school-aged children for a total maximum of 8 children in care at any one time.
- Child Development Home B: Limit of 8 preschool children with a maximum of 4 children aged 24 months or younger. Of these, no more than 3 can be 12 months of age or younger. They can also care for 4 school-aged children for a total maximum of 12 children in care at any one time. When there are more than 8 children present for more than 2 hours, an assistant 14 years or older needs to be present.
- Child Development Home C (2 providers): Limit of 14 preschool children with a maximum of 6 aged 24 months or younger. 2 additional school-age children can also be in care for a total maximum of 16 children in care at any one time. Whenever there are more than 8 children present, the business co-provider needs to be present.
- Child Development Home C (1 provider): Limit of 8 children with a maximum of 4 aged 24 months or younger.
- Center and preschool staff to child ratios: babies up to 23 months 1:4; 2-year-olds 1:6; 3-year-olds 1:8; 4-year-olds 1:12; 5-year-olds and older 1:15.

Iowa Department of Education

Iowa's Statewide Voluntary Preschool Program administered by the Iowa Department of Education provides an opportunity for all young children in the State of Iowa to enter school ready to learn by expanding voluntary access to quality preschool curricula for all four-year-old children. Participating school districts receive funding to offer at least 10 hours of preschool per week during the school year. Districts may provide the preschool directly or contract with a community partner to provide preschool on their behalf.

Until January 2016 some schools that offered child care, preschool (other than the Statewide Voluntary Preschool Program), or before and after school care, were exempt from being licensed with Iowa HHS, because they were overseen by the Iowa Department of Education. Now many of those programs need to be licensed as a child care center under HHS. An instructional program for children who are attending prekindergarten, as defined by the State Board of Education under Iowa Code section 256.11, or a higher grade level and are at least four years of age, or are at least three years of age and eligible for special education under chapter 256B, administered by a public or nonpublic school system accredited by the Department of Education or the State Board of Regents, or a nonpublic school system that is not accredited by the Department of Education or the State Board of Regents, is exempt from child care licensing under HHS.

Legal Unregulated Care in Iowa

In Iowa, parents may choose “family, friend, or neighbor care” or other unrelated caregiver such as a nanny or au pare. These providers may care for 6 or fewer children (including their own children). These types of care are not regulated and typically not tracked, unless the provider has an agreement with HHS to accept child care assistance, at which time they are considered a Child Care Home as described earlier in this section. Because these providers are “off the radar” and data is not available, the data in this report does not include unregulated providers. These homes are reflected in the column titled “Non-Registered Home without HHS agreement” in Table 12 on the next page.

Iowa Early Care and Education Supply

The total number of HHS regulated child care providers and child care spaces across Iowa has changed over the last several years. According to Iowa Child Care Resource & Referral (CCR&R) data, from 2017 to 2022 the total number of child care providers in Iowa declined by 24%, yet the total number of child care spaces increased by 5% and the number of children declined by 2%. During that same time, across Child Care Resource & Referral of Southeast Iowa (Region 5)¹⁷ the

¹⁷ Includes the counties of Benton, Cedar, Clinton, Des Moines, Henry, Iowa, Jackson, Jefferson, Johnson, Jones, Keokuk, Lee, Linn, Louisa, Muscatine, Scott, Tama, Van Buren and Washington.

number of child care programs declined by 22%, while the number of child care spaces increased by 3% and the number of children ages 0 to 5 declined by 3%.

Industry changes that occurred during this time that may have influenced these changes are:

- As of January 2016, child care, preschool (other than the Statewide Voluntary Preschool Program), and before and after school programs operated by a school district are no longer exempt from child care licensing. In some communities this resulted in a shift with some spaces previously counted under the Department of Education being counted under HHS.
- Starting in September 2016, all child care center staff, registered child development home operators, and child care home operators that accept Child Care Assistance were required to take the 12-hour “Essential Child Care Preservice” training.
- As of July 2017, Child Care Home operators that accept Child Care Assistance were required to complete preservice training, have their home inspected at least once a year, and meet other regulations that had not previously been required.
- Since being established in 2007, participation of school districts in the Statewide Voluntary Preschool Program has increased significantly. Overall participation of school districts reached 99% in 2022, with 324 of 327 districts participating. Overall enrollment has increased from 5,126 children in 2007, to 24,497 children in 2022. As more districts participate, this has increased the number of child care spaces under both HHS and Department of Education.

Clinton and Camanche Area Early Care and Education Supply

According to Child Care Resource & Referral data, from 2017 to 2022 Clinton County experienced a net decrease of 169 regulated child care spaces. The only child care setting where there was a gain was 84 spaces within licensed centers. Despite this gain, there were losses among registered child development homes (216 spaces) and non-registered child care homes (37 spaces). There was no change among Department of Education programs. *See table on next page.*

Table 13: Programs and Spaces in Clinton County

	2017	2018	2019	2020	2021	2022	Net Change
Total Programs	67	61	54	50	47	45	-22
HHS Centers & Preschools	17	16	16	20	21	20	+3
Dept. of Ed. Programs	2	2	2	2	3	2	---
Registered Child Dvpmt. Homes	37	39	36	28	23	20	-17
Child Care Homes	11	4	0	0	0	3	-8
Total Spaces	1,893	1,717	1,677	1,844	1,839	1,724	-169
HHS Centers & Preschools	1,371	1,238	1,238	1,481	1,516	1,455	+84
Dept. of Ed. Programs	35	35	35	35	55	35	---
Registered Child Dvpmt. Homes	432	424	404	328	268	216	-216
Child Care Homes	55	20	0	0	0	18	-37

Note: Data from Iowa Child Care Resource & Referral.

Iowa HHS data shows that as of November 2023, there are 28 HHS regulated programs in the market area, with a collective capacity of 1,314 spaces. Those programs breakdown as follows:

- Licensed Child Care Centers and Preschools- There are 14 licensed child care centers and preschools, which account for 1,165 spaces (88%).
- Registered Child Development Homes- There are 13 registered child development homes, which account for 144 spaces (11%).
- Child Care Homes- There is 1 child care home, which accounts for 5 spaces (1%).

The following tables shows the child care programs tracked by HHS within the market area. It is possible there are additional home providers or school-based programs not listed because they are not regulated by HHS. Comparable data is not available for those programs. See Table 14 and Table 15 on the next two pages.

Table 14: HHS Licensed Centers and Preschools in the Market Area, November 2023

Program Name	Hours	HHS Capacity	Child Care Assistance	IQ4K Level	Ages	Year-Round
APK Early Learning Academy, Camanche	6:00 am-5:30 pm Mon-Fri	132	Yes	---	0-12	Yes
CAEI-Clinton Head Start and Early Head Start, Clinton	7:30 am-2:00 pm Mon-Fri	68	N/A	3	0-5	Yes
CAS- Camanche After School, Camanche	6:00 am-5:30 pm Mon-Fri	57	Yes	---	5-12	No
Eagle Heights Student Adventures Program, Clinton	Before- 6:30 am-7:30 am After- 2:30 pm-5:00 pm Mon-Fri	57	Yes	---	K-5 th grade	No

Table continued on next page.

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Program Name	Hours	HHS Capacity	Child Care Assistance	IQ4K Level	Ages	Year-Round
Jefferson Student Adventures Program, Clinton	Before- 6:30 am-7:30 am After- 2:30 pm-5:00 pm Mon-Fri	36	Yes	---	K-5 th grade	No
Kiddie Kollege, Clinton	6:00 am-5:30 pm Mon-Fri	92	Yes	---	0-12	Yes
MercyOne Clinton Child Care and Preschool, Clinton	5:45 am-6:15 pm Mon-Fri	165	Yes	---	0-12	Yes
Prince Of Peace Preschool & Childcare, Clinton	7:30 am-5:30 pm Mon-Fri	46	Yes	---	0-5	No
St John Lutheran Preschool, Clinton	9:00 am-12:45 pm Mon-Fri	24	Yes	4	3-5	No
Stay N Play Childcare, Clinton	6:00 am-6:00 pm Mon-Fri	52	Yes	1	18 mos. - 5 yrs.	Yes
Wee School For Little People, Clinton	6:30 am-6:00 pm Mon-Fri	90	Yes	---	0-10	Yes
YWCA Children's Center, Clinton	6:00 am-12:00 am Mon-Fri	137	Yes	---	0-12	Yes
YWCA Children's Center Lyons Campus, Clinton	6:00 am-6:00 pm Mon-Fri	92	Yes	4	0-12	Yes
Zion Child Care Preschool, Clinton	5:45 am-5:30 pm Mon-Fri	115	Yes	---	0-12	Yes

Note: Data from Iowa Department of Health and Human Services (2023)

Table 15: HHS Registered Child Development Homes in the Market Area, November 2023

Program Name & Type	Hours	HHS Capacity	Child Care Assistance	IQ4K Level
Audrey Yarolem, Clinton Registered Home A	12:00 am-11:59 pm (24 hrs.) Sun-Sat (7 days)	8	Yes	---
Barbara Letsch, Clinton Registered Home B	12:00 am-11:59 pm (24 hrs.) Sun-Sat (7 days)	12	Yes	---
Chelsea Griffin, Clinton Registered Home C1	6:00 am-4:00 pm Mon-Fri	8	Yes	---
Corie Kooi, Camanche Registered Home B	6:00 am-5:00 pm Mon-Fri	12	Yes	---
Danielle Schrader, Clinton Non-Registered Child Care Home	12:00 am-11:59 pm (24 hrs.) Sun-Sat (7 days)	5	Yes	---
Destiny Reed, Clinton Registered Home B	7:00 am-11:00 pm Sun-Sat	12	Yes	---
Jalise White, Clinton Registered Home A	7:30 am-5:00 pm Mon-Fri	8	Yes	---
Jenny Edens, Camanche Registered Home B	5:00 am-5:00 pm Mon-Fri	12	Yes	---

Table continued on next page.

Table continued from previous page.

Program Name & Type	Hours	HHS Capacity	Child Care Assistance	IQ4K Level
Jessica Bates, Clinton Registered Home B	7:00 am–5:00 pm Mon–Fri	12	Yes	---
Kathy Heiken, Clinton Registered Home B	6:00 am–7:00 pm Sun–Sat	12	Yes	---
Michelle Hintz and Heather Dykema, Clinton, Registered Home C	6:30 am–5:30 pm Mon–Sat	16	Yes	2
Mimis Magic Makers, Clinton Registered Home B	5:30 am–5:30 pm Mon–Fri	12	Yes	---
Sheila Lehmkuhl, Camanche Registered Home B	7:30 am–5:30 pm Mon–Fri	12	Yes	---
Tricia Grimes, Clinton Registered Home A	12:00 am–11:59 pm (24 hrs.) Mon– Sat	8	Yes	---

Note: Data from Iowa Department of Health and Human Services (2023)

Residents of the market area are served by 3 public school districts and 1 private school. Some districts are located entirely within the market area, while others stretch outside the market area.

The following school districts serve the market area:

- Camanche Community School District– The district is based out of Camanche. The district serves all of the 52730–zip code including the city limits of Camanche, and a portion of the 52732–zip code, which is outside the Clinton city limits. The district has 1 elementary building which serves preschool through 4th grade. Certified enrollment for the district 2022–2023 school year was 995 students (PK–12), with 58 of those in preschool, and 336 in kindergarten through 4th grade.
- Clinton Community School District– The district is based out of Clinton. The district serves the far eastern portion of the 52732–zip code including the city limits of Clinton. The district has 4 elementary buildings which serves preschool through 5th grade. Bluff Elementary houses preschool through 5th grade, Jefferson Elementary houses kindergarten through 5th grade, Eagle Heights Elementary houses preschool through 5th grade, and Whittier Elementary houses preschool through 5th grade. Certified enrollment for the 2022–2023 school year was 3,249 students (PK–12), with 73 of those being in preschool and 1,483 in kindergarten through 5th grade. In addition, the school district has multiple Community Partner agreements to deliver Statewide Voluntary Preschool. Those partners include: Prince of Peace, Stay N Play, YWCA Jefferson, YWCA Lyons, and Zion Child Care Preschool.
- Northeast Community School District– The district is based out of Goose Lake. The district serves the western portion of the 52732–zip code, which is outside the Clinton city limits. The district has 1 elementary building which serves preschool through 5th grade. Certified enrollment for the district 2022–2023 school year was 868 students (PK–12), with 45 of those in preschool, and 353 in kindergarten through 5th grade. The district offers 2 sessions

of SWVPP, a morning session and an afternoon session, four days a week. Wraparound care is available before and after preschool and all day on Wednesday when there is no preschool.

- Prince of Peace Catholic School- This private school is based in Clinton. The school has 1 elementary building which serves kindergarten through 5th grade. Certified enrollment for the 2022-2023 school year was 183 students (K-12), with 30 of those enrolled in preschool, and 94 in kindergarten through 5th grade. Prince of Peace offers preschool as a community partner of Clinton CSD for the Statewide Voluntary Preschool Program (SWVPP) for four-year-olds. Wraparound care is available before and after preschool.

Statewide Voluntary Preschool Program (SWVPP) is available through all school districts in the market area. According to certified enrollment numbers reported to the Iowa Department of Education for the 2022-2023 school year, there are collectively 144 students enrolled in these SWVPP programs. It does need to be noted some of these enrollments may be duplicative with the preschool enrollments above as many districts offer additional hours of preschool that is not funded through the SWVPP program. *See table on next page.*

Table 16: Statewide Voluntary Preschool Programs Serving the Market Area

School District (Location/Building)	2022-2023 Certified Enrollment
Camanche Community School District	27.5
Clinton Community School District- Direct Enrollment	96.5
Northeast Community School District	20.0

Note: Data from Iowa Department of Education (2023)

Local Price Point

Besides individual providers changing their rates, changes in the average tuition rates can be the result of providers going out of business, new providers coming into the market, providers no longer reporting their tuition rates if they stop accepting child care assistance, or homes that let their registration expire and no longer report their tuition to HHS (centers cannot let their license expire or the license will be revoked). When comparing rates, it is important to note that some providers charge tuition that is all-inclusive, while others may charge separate fees, or charge for specific items or require parents to furnish supplies, snacks, or other items, and some programs operate full-time while some are only part-time.

Over the last 5 years, the average weekly tuition rates for care within a licensed center or preschool within Clinton County have increased for all ages. According to Iowa Child Care Resource & Referral, as of July 2022, the average weekly rates for care in a licensed center within

Clinton County ranged from a low of \$153.71 for full-time school age care, to a high of \$196.67 per week for infant care and toddler care. Before & after school care averaged \$136.27 per week.

Table 17: Average Weekly Tuition Rates of Licensed Centers, Clinton County

	2017	2018	2019	2020	2021	2022
Infant	\$183.45	\$193.75	\$195.00	\$180.50	\$184.45	\$196.67
Toddler	\$179.05	\$190.40	\$194.15	\$180.50	\$184.45	\$196.67
Two-Year-Old	\$157.80	\$165.40	\$166.65	\$167.20	\$170.60	\$184.38
Three-Year-Old	\$147.80	\$152.10	\$153.35	\$166.20	\$168.10	\$168.47
Four- & Five-Year-Old	\$146.55	\$142.90	\$144.15	\$165.20	\$167.27	\$190.00
School-Age (full time)	\$140.50	\$144.50	\$146.00	\$143.33	\$147.75	\$153.71
Before & After School	\$58.33	\$93.33	\$88.75	\$95.00	\$81.67	\$136.27

Note: Data from Iowa Child Care Resource & Referral.

Over the last 5 years, the average weekly tuition rates for care within a registered home within Clinton County have increased. As of July 2022, average weekly rates for full time care in a registered child development home ranged from a low of \$131.77 for full-time school-age care, to a high of \$144.33 for infant care. Before & after school care averaged \$61.78 per week.

Table 18: Average Weekly Tuition at Registered Homes, Clinton County

	2017	2018	2019	2020	2021	2022
Infant	\$126.90	\$143.57	\$128.25	\$131.40	\$139.95	\$144.33
Toddler	\$126.90	\$139.86	\$128.70	\$131.40	\$139.95	\$141.95
Two-Year-Old	\$123.30	\$129.71	\$122.85	\$124.20	\$133.20	\$138.86
Three-Year-Old	\$123.30	\$129.29	\$122.85	\$124.20	\$133.20	\$138.86
Four- & Five-Year-Old	\$123.30	\$128.71	\$122.85	\$124.20	\$133.20	\$143.35
School-Age (full time)	\$121.50	\$131.57	\$119.70	\$118.35	\$129.60	\$131.77
Before & After School	\$53.76	\$57.34	\$58.33	\$61.67	\$60.00	\$61.78

Note: Data from Iowa Child Care Resource & Referral.

With a portion of the workforce commuting from outside of Clinton County and school district boundaries that cross county lines, the average weekly tuition rates of neighboring counties can also be informative. Average weekly tuition at both licensed centers and registered child development homes varies from county to county.

When it comes to average weekly tuition at licensed centers as of November 2023, Scott County has the highest average for infants through school age, while Jackson County has the highest average for before & after school care. In contrast, Jones County has the lowest average for care for infants through school age, plus before & after school care. When putting tuition in perspective with the child care supply, Scott County has the greatest number of child care

centers and spaces within child care centers, while Jackson County has the fewest child care centers, and Jones County has the fewest child care spaces within centers.

Table 19: Average Weekly Tuition at Licensed Centers in Surrounding Counties

	Cedar	Clinton	Jackson	Jones	Scott
Infant	\$192.50	\$203.29	\$205.63	\$189.17	\$275.72
Toddler	\$192.50	\$201.50	\$205.63	\$185.50	\$272.66
Two-Year-Old	\$186.11	\$192.82	\$193.75	\$158.88	\$231.33
Three-Year-Old	\$170.63	\$160.85	\$159.17	\$158.73	\$204.15
Four- & Five-Year-Old	\$173.75	\$163.94	\$159.17	\$153.41	\$205.77
Full time School-Age	\$150.29	\$155.02	\$175.26	\$143.75	\$182.85
Before & After School	\$96.86	\$106.31	\$191.25	\$64.17	\$98.97
Total HHS Centers	10	20	7	11	85
Spaces w/in Centers	610	1,474	716	598	7,422

Note: Data from Iowa Child Care Resource & Referral (November 2023)

When it comes to average weekly tuition for care at registered homes as of November 2023, Jackson County has the highest average for all infants through school age, while Cedar County has the highest average for before and after school care. In contrast, Cedar County has the lowest average for infants, while Jones has the lowest average for toddlers through age five, plus before and after school care. When putting tuition in perspective with the child care supply, Scott County has the greatest number of registered homes and spaces within registered homes, while Jackson County has the fewest registered homes and fewest number of spaces within registered homes.

Table 20: Average Weekly Tuition at Registered Homes in Surrounding Counties

	Cedar	Clinton	Jackson	Jones	Scott
Infant	\$142.50	\$147.11	\$193.75	\$143.63	\$151.63
Toddler	\$142.50	\$143.79	\$193.75	\$140.29	\$149.71
Two-Year-Old	\$141.07	\$145.05	\$188.75	\$137.54	\$146.36
Three-Year-Old	\$141.07	\$145.05	\$188.75	\$136.09	\$143.37
Four- & Five-Year-Old	\$142.00	\$146.38	\$188.75	\$141.91	\$148.41
Full time School-Age	\$136.54	\$139.51	\$181.25	\$132.65	\$130.60
Before & After School	\$79.50	\$66.00	---	\$67.08	\$72.37
Total Registered Homes	14	17	2	20	143
Spaces w/in Reg. Homes	156	192	20	224	1,532

Note: Data from Iowa Child Care Resource & Referral (November 2023)

Child Care Assistance in Iowa

Child Care Assistance (CCA) is available to the children of income-eligible parents to help pay for care at Iowa Department of Health and Human Services (HHS) approved child care programs

while a parent or caretaker works or attends school. Child care programs are reimbursed directly from HHS when they provide care to a family that qualifies. As of July 1, 2023, the income eligibility limit for those initially applying for CCA is 160% of Federal Poverty Level (FPL), or 200% if they have a child with special needs. According to the poverty threshold that went into effect in January 2023, 160% of FPL is equivalent to \$39,776 for a household of 3, and \$48,000 for a household of 4. Once approved a family's income will be checked annually, and they continue to be eligible if their income does not exceed 225% of FPL, which is equivalent to \$55,935 for a household of 3, and \$67,500 for a household of 4.¹⁸

Reimbursements to the provider are based on the number of units a child attends each week but cannot exceed the number approved by HHS. A unit is a half-day (up to 5 hours). In most cases, a child that attends full time, five days a week would be approved for 10 units (2 half-day units, for 5 days) or less, depending on several factors, including the parent's or caretaker's work or school schedule. A child care provider is reimbursed at a rate equal to the amount they would charge a private pay family (or equivalent), with a maximum reimbursement rate based on whether or not the provider participates in the IQ4K quality rating system. At this time, 27 of 28 HHS regulated child care programs in the market area accept child care assistance. Among those programs, 5 participate in IQ4K, allowing them the potential to be reimbursed at a higher rate. The 1 program that is not accepting CCA is Head Start, which is an income-based program. *See table on next page.*

¹⁸ Starting July 5, 2023, HHS implemented a pilot program which allows the child care workforce to apply for Child Care Assistance (CCA) for their own children even if they are over the family income limit, as long as they meet all other CCA eligibility criteria, and the child will be cared for by someone other than the parent/guardian if approved.

Table 21: Half-Day Maximum CCA Reimbursement Rates

Age Group	No QRS		QRS Level 1 or Level 2		QRS Level 3 or Level 4		QRS Level 5	
	Basic Care	Special Needs	Basic Care	Special Needs	Basic Care	Special Needs	Basic Care	Special Needs
Licensed Centers								
Infant/Toddler	\$23.21	\$51.94	\$23.21	\$51.94	\$23.21	\$51.94	\$24.05	\$51.94
Preschool	\$18.98	\$30.43	\$19.50	\$30.43	\$20.00	\$30.43	\$21.00	\$30.43
School Age	\$15.00	\$30.34	\$15.50	\$30.34	\$16.00	\$30.34	\$17.00	\$30.34
Child Development Home A or B								
Infant/Toddler	\$14.00	\$21.00	\$14.00	\$21.00	\$14.00	\$21.00	\$15.00	\$21.00
Preschool	\$12.75	\$19.13	\$13.00	\$19.13	\$13.75	\$19.13	\$15.00	\$19.13
School Age	\$11.25	\$16.88	\$12.50	\$16.88	\$13.00	\$16.88	\$13.50	\$16.88
Child Development Home C								
Infant/Toddler	\$15.25	\$22.88	\$15.25	\$22.88	\$15.25	\$22.88	\$16.25	\$22.88
Preschool	\$15.00	\$22.50	\$15.00	\$22.50	\$15.00	\$22.50	\$16.00	\$22.50
School Age	\$13.00	\$19.50	\$13.75	\$19.50	\$14.50	\$19.50	\$15.00	\$19.50
Child Care Homes (not registered)								
Infant/Toddler	\$12.98	\$19.47	N/A	N/A	N/A	N/A	N/A	N/A
Preschool	\$12.50	\$18.75	N/A	N/A	N/A	N/A	N/A	N/A
School Age	\$10.82	\$16.23	N/A	N/A	N/A	N/A	N/A	N/A

Note: Data from Iowa Department of Health and Human Services (2023)

CHILD CARE NEEDS SURVEY RESULTS

In October 2023, three electronic surveys developed by First Children's Finance were distributed by Grow Clinton for the purpose of determining how child care affects employers and parents, as well as to gain insight from child care providers about the current challenges and opportunities in the community. To ensure there were no biases and to maintain confidentiality, surveys were distributed electronically and then collected and analyzed by First Children's Finance. Comments made by survey participants are shared verbatim as long as an individual respondent, local employer, or child care program cannot be identified, in which case the comment may have been partially reported or edited to remove the identifying information.

Employer Survey Results

A total of 19 companies participated in the employer survey. Participating companies represent the following industries: Arts, Entertainment & Recreation; Educational Services; Finance & Insurance; Health Care & Social Assistance; Information; Professional, Scientific & Technical; Public Administration; Real Estate, Rental, Leasing; Retail Trade; and Transportation & Warehousing.

Collectively these companies employ 1,804 individuals at all of their locations, with 971 of those working at or reporting to their Clinton and Camanche locations. Of those working or reporting to their Clinton and Camanche locations, 833 are full-time and 138 part-time. There are 126 full-time and 41 part-time vacant positions at these locations.

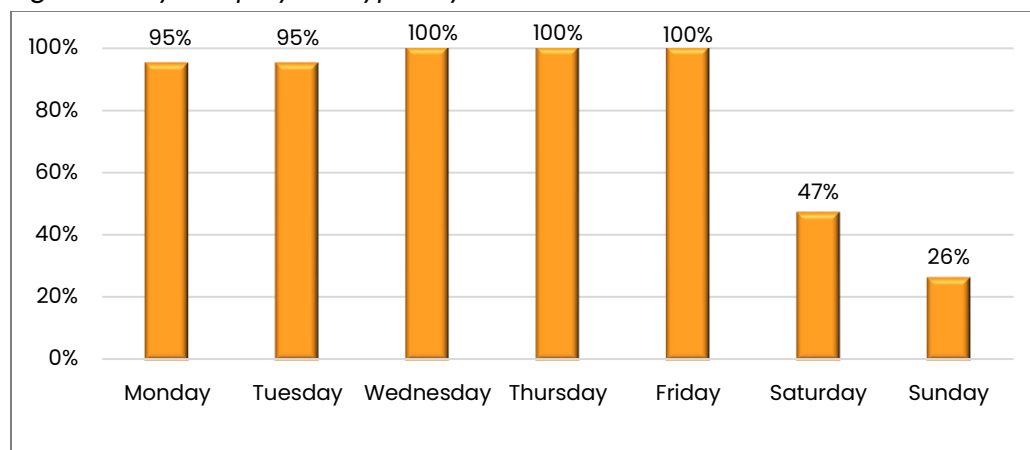
Table 22: Employees & Vacant Positions at Locations in the Market Area

	Full-Time Employees	Part-Time Employees	Total Employees	Full-Time Vacancies	Part-Time Vacancies	Total Vacancies
First Shift (days)	581	102	683	65	33	98
Second Shift (evenings)	107	28	135	31	7	38
Third Shift (overnight)	55	8	63	30	1	31
Rotating Shift	90	0	90	0	0	0
Total	833	138	971	126	41	167

In a separate question, employers were asked how many new positions they plan to add at their Clinton and Camanche locations in the next 3 years. Seventy-four percent (74%) report they do plan to collectively add 191 positions. Most of those (10 employers) plan to add 5 or fewer positions, 2 plan to add 10 to 15 positions, 1 plans to add 40 positions, and 1 plans to add 100 positions.

When asked which days of the week their employees typically work, 11 indicated they operate 5 days a week with 10 operating Monday through Friday and one operating Tuesday through Saturday, 4 indicated they operate 6 days a week with 3 operating Monday through Saturday and one operating Wednesday through Sunday, and 4 indicated they operate 7 days a week. Overall, all employees operate Wednesday through Friday (100%), while most also operate on Monday and Tuesday (95%), about half (47%) operate on Saturday, and one-quarter (26%) operate on Sunday.

Figure 1: Days Employees Typically Work



When it comes to hours of operation, the largest group, 63% (12 employers), operate first shift, with 7 operating Monday through Friday, 3 operating Monday through Saturday, 1 operating Tuesday through Saturday, and 1 operating Wednesday through Monday. Hours of operation for these employers varies but all occur between 6:00 am and 6:00 pm. Another 11% (2 employers) operate extended hours, all day and into the evening. The hours of operation for these employees are 5:00 am to 9:00 pm and 8:00 am to 8:00 pm. The remaining 26% (5 employers) operate 24-hours, with 2 operating Monday through Friday (weekdays) and 3 operating Monday through Sunday (7 days).

Employers were asked if some or all of their employees work set shifts, and the hours for each shift. The following comments were received:

- *First shift- 6:24 am to 2:30 pm. Second shift- 2:24 pm to 10:30 pm. Third shift- 10:24 pm to 6:30 am.*
- *Varies greatly.*
- *First shift- 6:00 am to 5:00 pm. Second shift- 6:00 pm to 4:00 am.*
- *First shift- 7:00 am to 3:00 pm. Second shift- 3:00 pm to 11:00 pm. Third shift- 11:00 pm to 7:00 am.*

Sixteen percent (16%) of employers indicated there are sometimes changes or fluctuations in their hours or days of operations. Comments received about schedule fluctuations were:

- *Whenever [corporation] tell us.*
- *Depends on production needs.*
- *Planned overtime, training, holidays, and Saturdays.*

Employers were asked what percentage of their employees are female. Overall, the majority of employers report that more than one-half of their employees are female. Sixteen percent (16%) reported less than one-quarter, 5% reported between one-quarter to one-half, 37% reported one-half to three-quarters, and 42% reported over three-quarters.

Table 23: Composition of Workforce

	Percent of Employers
0% to 25% female	16%
26% to 50% female	5%
51% to 75% female	37%
76% to 100% female	42%

Employers were asked to estimate the percentage of employees that have children age 12 or younger. Overall, the majority of employers reported that more than half of their employees have children age 12 or younger. Five percent (5%) reported less than one-quarter, 16% reported between one-quarter to one-half, 42% reported one-half to three-quarters, and 37% reported over three-quarters.

Table 24: Percentage of Employees with Children

	Percent of Employers
0% to 25% have children	5%
26% to 50% have children	16%
51% to 75% have children	42%
76% to 100% have children	37%

Employers were asked to estimate the percentage of their workforce that lives in Clinton and Camanche. Overall, the majority of employers report that most of their employees live outside the market area. Thirty-seven percent (37%) reported less than one-quarter, 58% reported between one-quarter to one-half, 5% reported one-half to three-quarters, and 0% reported over three-quarters. *See table on next page.*

Table 25: Percent of Employees Living in the Market Area

	Percent of Employers
0% to 25% live in Clinton or Camanche	37%
26% to 50% live in Clinton or Camanche	58%
51% to 75% live in Clinton or Camanche	5%
76% to 100% live in Clinton or Camanche	0%

Fifty-two percent (52%) of employers indicated their company had employees that departed during the last 12 months as a direct result of child care challenges. Collectively they lost 80 employees, with one company losing 50 employees, another losing 15 employees, and the remaining losing 1 to 5 employees each. As a follow up, employers were then asked a series of questions about productivity, absenteeism, and other challenges as they relate to child care.

When it comes to employee productivity, 47% of employers indicated they had challenges related to productivity due to employee's child care challenges, while 16% were unsure, and 37% said they did not. Comments received were:

- *Employee could not work when child was not in school.*
- *Taking off for children that are sick for the parent and 2 other employees who are grandparents and fill in for their children when sick.*
- *We provide childcare, so not so much access to childcare as child illnesses. We are DHS licensed and cannot care for sick children.*
- *Most attendance issues are employees calling in sick. Whether it is themselves or a sick child.*
- *Short staffed.*
- *Employees do not always arrive on time because of their children.*
- *Employees may have to adjust schedules to meet needs.*
- *I believe most of the agents are able to work around their kid's schedules. I have had challenges helping new employees find child care while they are at work.*
- *When we are short staffed at times, we only have time to wait on customers. So, tagging, cleaning, rearranging, etc. gets put off according to importance. Most of the time I am picking up the slack which means I am working 70 hours a week and then my work in the office suffers.*

When asked about absenteeism due to employee's child care challenges, 42% of employers indicated they had experienced challenges, while 16% were unsure, and 42% had not. Comments received were:

- *Call offs because of not having daycare.*
- *Missing work to stay home with a sick child.*

- *No childcare for an ill child.*
- *When we are short staffed at times, we only have time to wait on customers. So, tagging, cleaning, rearranging, etc... get put off according to importance. Most of the time I am picking up the slack which means I am working 70 hours a week and then my work in the office suffers.*
- *Employees leave a lot during the day due to no day care available.*

Separately, 37% of employers indicated they had experienced difficulty hiring due to child care options or challenges, 26% were unsure, and 37% had not. Comments received were:

- *Some people do not have daycare in the hours needed for their shift.*
- *I have a single mom and is VERY important here at the office. Currently her baby is 2 1/2 months old, and we are allowing her to bring the infant to the office due to child care being so expensive! She will have to have something in place by the time the baby is 5 months old. She could get state assistance, but options are very limited and in home daycare is outrageous.*
- *I have heard people talk about not being able to find a place to take a sick child, so they can work.*
- *Not sure if that has actually presented itself as an issue. Most of our hires are local.*
- *Childcare is not available.*
- *We have lost out on the opportunity to hire talented individuals a few times because they cannot find childcare.*
- *Not an interview or exit interview question.*
- *People who are relocating seem to have the biggest challenges. They do not know anyone here, so they do not have a network of people to tap into.*
- *Everyone that is here with a child - has had the child since they have worked here. I do not know if people have not applied because they cannot find child care.*

Employers were given a list of common effects their employees (not job applicants) may experience due to child care challenges and were asked to select all that they are aware of as having affected their employees in the last 12 months. The top challenges were had to leave work early, which was experienced by 68% of employers, employees arrived late to work (63%), missed a day of work because their child care provider was closed, on vacation, or not available (47%), unable to work overtime (42%), and unable to accept a different work schedule or shift (37%). Twenty-six percent (26%) of the employers indicated their employees had experienced no issues related to work and child care.

Table 26: Effects of Child Care Challenges on Employees

	Percent of Employers
Missed a day of work because their provider was closed, on vacation, or not available	47%
Missed a day of work because their provider did not have room or space for a child	26%
Did not accept a desired job offer	11%
Arrived late to work	63%
Had to leave work early	68%
Unable to work overtime	42%
Unable to travel for work	11%
Lower productivity	26%
Unable to accept a different work schedule or shift	37%
Have had to reduce the number of hours worked	16%
Received disciplinary action (not including firing)	5%
Quit a job	21%
Got fired	5%
Had to change jobs to one that works with their child care arrangement	26%
Took a job that does not fit their skills	0%
Had to leave their child home alone to go to work	11%
Had to bring their child to work with them	16%
Other (see comment below table)	5%
Our employees experienced no issues related to work and child care	26%

Comments received were:

- *Employee did not like current child care offerings in our area, so she quit and took a job that would allow her to be off work when her child was out of school.*

Employers were asked if their company currently offered any child care related benefits to their employees (they were asked to select all that apply). The benefits on the list do typically result in the employer incurring additional costs. Nearly three-quarters of employers (74%) selected “none of the above”. Twenty-two percent (22%) indicate they offer dependent care flex spending accounts, and 5% offer financial assistance to help employees pay for child care.

Table 27: Child Care Related Benefits Currently Offered

	Percent of Employers
Dependent Care Flex Spending Accounts	22%
Financial assistance to help employees pay for child care	5%
None of the above	74%

Employers were then asked what prevents their company from offering any or some of the benefits listed above. Comments received were:

- *We are a non-profit organization and do not have the resources to offer those benefits. We do offer flexibility and extensive scheduling change options to accommodate needs.*
- *[Our parent company] does not offer those benefits.*
- *Cost.*
- *We financially can't offer child care assistance.*
- *We are a small company and do not have the funds.*
- *Has not been requested or needed.*
- *Budget constraints.*
- *Cost.*
- *Affordability.*
- *Not needed to date.*

Employers were then given a second list of child care related benefits and asked which they offer to their employees (they were asked to select all that apply). The benefits on this list typically do not result in the employer incurring additional costs. Over one-half (53%) indicated they provide employees flexible schedules if the employee's regular child care arrangement is not available, this was followed by 26% of employers indicating they offer work from home options if the employee's regular child care arrangement is not available. Overall, 42% of employers indicated they offer "none of the above".

Table 28: Non-Financial Child Care Related Benefits Offered

	Percent of Employers
Child care information is included in employee orientation	11%
Child care information is included in an employee handbook	5%
Flexible schedules if their regular child care arrangement is not available	53%
Work-from-home options if their regular child care arrangement is not available	26%
None of the above	42%

Employers were then asked what prevents their company from offering any or some benefits listed above. Comment received was:

- *We are a service-oriented type of business -- work cannot be done from home.*
- *We cannot offer in all departments. For example, a lifeguard can't work from home. A Marketing Coordinator can.*
- *We are a small company and do not have the funds.*
- *Cost, productivity.*

- *Although we can offer to some many of our positions do not have remote or flexible hours.*
- *All the realtors are self-employed. I do not offer any benefits.*
- *Being a retail store does not allow for most of those situations and employees do not want to have a backup sitter.*
- *Not a work from home business.*
- *Not needed to date.*

Employers were asked to share any other ways their business assists employees with child care. The following comments were received:

- *Responses to queries on recommendations, assistance in building contacts as parent conducts evaluation process, support in achieving favorable outcome.*
- *I offer them some information about Iowa Child Care Resource & Referral.*
- *If our employee meets her set objectives, we will give her a bonus. We also give this employee a flex schedule. If she needs to make up missed time, or needs to come in earlier or stay late to compensate for appointments she needs to make etc.*
- *Childcare on site, [discount on] full pay rates.*
- *I have allowed for a longer work day that helps with the cost of day care as they can still get 40 hours in. However, not everyone likes that option. I have also allowed employees to pick certain days off to make it easier for them.*

Employers were asked how their business would be willing to assist in addressing the child care shortage and/or supporting child care businesses. A list of options was provided, and respondents asked to select all that apply. The majority, 58%, selected “none of the above”. Among those that are willing to consider helping, the most common answer was “other” which was selected by 26%, however no concrete examples were given (see comments below). The next most common solution employers would be willing to offer is to own and operate a child care center, either on-site or off-site, which was selected by 11% (2 employers). One of these employers already owns and operates a licensed child care center, while the other provides educational services for children but does not provide child care. See *table on next page*.

Table 29: Child Care Solutions Employers are Willing to Consider

	Percent of Employers
Provide space for on-site for a child care center (owned & operated by another entity)	5%
Own and operate a child care center (either on-site or off-site)	11%
Provide a significant donation or financial contribution as match for a grant application	0%
Donation or financial contribution for build, remodel, or expand a child care center	5%
Donate land or provide a financial contribution to purchase land to build a larger child care center	0%
Directly employ the Center Director (paying wages and benefits) in order to help reduce operating costs	0%
Annual donation or financial contribution to a child care center that is equal to the wages of a child care center director	0%
Annual donation or financial contribution for a portion (but not all) of the wages of a child care center director	0%
Other (see comments below)	26%
None of the above	58%

Comments received from those indicating “other” were:

- *I am not sure [corporate company] would help with any of the above.*
- *You would have to speak with the owner of the company.*
- *As a government entity it is difficult to commit rhetorically.*
- *Unknown.*
- *Unsure of what we could do financially.*

Next employers were given another list of ways a business may assist in addressing the child care shortage and/or supporting child care businesses. Respondents were asked to select all that apply. The two most common answers were, none of the above, which was selected by 37%, and appoint an employee to serve on the Board of Directors of a child care program, which was also selected by 37%. The next most common answer was “other” which was selected by 32%, however no concrete examples were given (see comments). *See table on next page.*

Table 30: Ways that Employers are Willing to Support Child Care Businesses

	Percent of Employers
Appoint an employee to serve on the Board of Directors of a child care program	37%
Provide child care providers access to purchase supplies through our company to take advantage of bulk pricing or discounts	0%
Provide in-kind services to reduce expenses of a child care program (ex. bookkeeping, payroll, maintenance, cleaning, etc.)	5%
Donation or financial contribution for the operation of a child care program	0%
Donation or financial contribution for child care scholarships for your employees	0%
Donation or financial contribution for child care scholarships for all children	0%
Pay a child care provider the tuition of a vacant slot in order to reserve or hold that slot for one of your employees (with the employee taking over payment upon enrolling)	0%
Other	32%
None of the above	37%

Comments received from those indicating “other” were:

- *Unsure.*
- *We already do much of the above, as we operate a childcare as a part of our business.*
- *That is something the owner of the company would have to address.*
- *As a government entity it is difficult to commit rhetorically.*
- *Unknown.*
- *Of course, the employee would have to agree about the appointment.*

Employers were asked what they think is the biggest challenge facing parents regarding child care, and what will resolve that challenge. Comments received were:

- *They are unsure of quality and don't have trust in providers.*
- *Good child care options in the area with hours of Nestle Purina shift hours.*
- *Cost.*
- *Having to pay the provider whether your child is there or not. In other words, if you need to have a backup, you have to pay full time also when the center is closed, you still have to pay. It is just too crazy expensive!*
- *Cost.*
- *I think we've done all we can to help address childcare barriers, but I think some items are just inevitable, like a sick child. Or being late, due to children issues. For us, it's not access to care, we are open until 9:00 pm, it's just the complications of having a young family that are hard to avoid.*
- *Affordable care.*
- *Cost. If the parent did not have to pay for a day the child was not at the childcare facility.*
- *Cost of child care. Flexibility in hours of child care.*

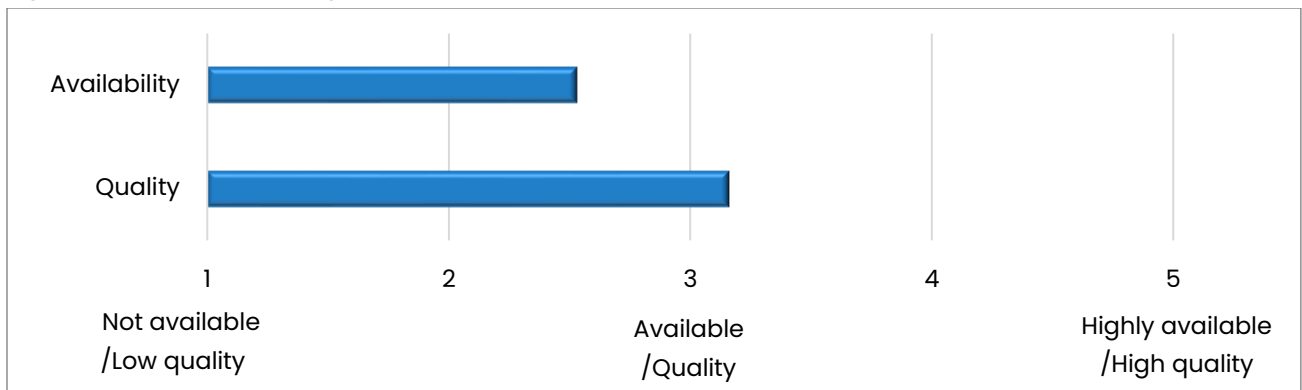
- *Not enough childcare choices. Two working parents with different schedules.*
- *Expense. Many are choosing not to work because their entire paycheck would go to the day care provider.*
- *Costs.*
- *Finding affordable daycare. Unfortunately, I do not know what will resolve the situation.*
- *Need more day care centers with trusted individuals.*

Employers were asked what opportunities they see that should be explored to help address the child care supply. Comments received were:

- *More large worksite employers that offer a child care center -- and that opportunity is broadly available to many, such as MercyOne childcare.*
- *Support childcares in their efforts to stay open. Employers should offer childcare slots as benefits to their employees.*
- *Do a survey with parents at all schools.*
- *Reach out to Clinton Jackson Early Childhood Iowa.*
- *Affordable daycare.*
- *Asking large businesses to have childcare facilities available on business sites.*
- *Evening and weekend options are under serviced.*

Employers were asked to rate the *availability* of child care in Clinton and Camanche on a scale of 1 to 5, with 1 being not available, 3 available, and 5 highly available (the higher the score, the more available). The average rating was 2.53. Employers were then asked to rate the *quality* of child care in Clinton and Camanche on a scale of 1 to 5, with 1 being low quality, 3 quality, and 5 high quality (the higher the score, the higher quality). The average rating was 3.16.

Figure 2: Employer Ratings of Child Care in the Clinton and Camanche



Employers were asked to provide additional thoughts about their employees' needs related to child care. Comments received were:

- *Reliable childcare makes for reliable and productive employees.*
- *What we have experienced is applicants bowing out once they learn hours they would be scheduled as they have no child care to support them.*

The final question asked employers to provide any additional thoughts about the supply of child care in Clinton and Camanche. Comments received were:

- *As a community, we need to support childcare providers. It's a difficult business. Expensive for parents, difficult for centers to stay profitable, and pay their employees well. It should be considered the service of taking care of our most precious resources, our children. Either employers need to help fund or the government, as an essential need for a thriving community.*
- *People relocating to the Clinton area for a new job mention our lack of childcare and in some cases, do not take the new job move/promotion. They ask about childcare, public schools, and "amenities". No one is asking about golf courses/country clubs anymore.*

Child Care Provider Survey Results

A total of 7 child care provider surveys were completed. Six (6) providers are located in the 52732–zip code which is Clinton, and the other is in the 52730–zip code which is Camanche. Three (3) child care centers and 4 home–based providers are represented. All 3 centers are licensed, and all 4 of the home providers are registered child development homes with the Iowa Department of Health and Human Services (HHS).

All providers answered questions about the length of time they have been providing care, and how much longer they plan to provide care (home providers only). All 3 centers have been in business for more than 20 years. Among home providers, 1 has been in business for more than 20 years, 2 have been in business between 10 and 19 years, and 1 has been in business for 5 to 9 years. All 4 home providers indicated they intend to continue providing child care for an additional 5 or more years.

Table 31: Years Child Care Business Has Been in Operation

	20+ Years	10 to 19 years	5 to 9 years	1 to 4 years	Less than 1 year
Centers	3	---	---	---	---
Homes	1	2	1	---	---

The providers that participated collectively have a current enrollment of 305 children, with 232 of those enrolled full-time and 73 enrolled part-time. According to Iowa HHS, the collective legal capacity of the licensed centers is 301, and the centers indicated they currently have 258 children enrolled, both full-time and part-time. According to Iowa HHS regulations for the specific registration levels the home providers represent, they have a collective legal capacity of 44 children, while their preferred capacity is 45, and they currently have 47 children enrolled both full-time and part-time.

Table 32: Participating Programs by Type

	Total Providers	Legal Capacity	Preferred Capacity	Full-Time Enrollment¹⁹	Part-Time Enrollment	Total Enrollment
Licensed Center/Preschool	3	301	301	204	54	258
Registered Homes	4	44	45	28	19	47
Unregistered Homes	0	---	---	---	---	---
	7	345	346	232	73	305

¹⁹ It is possible for a child care program to have more children enrolled than what their capacity allows due to varying attendance schedules of the children.

The centers reported they collectively employ 60 employees, 53 full-time (36 hours per week or more) and 7 part-time (35 hours per week or less). During the previous 12 months 30 employees departed (voluntarily or involuntarily), 14 of those were full-time employees and 16 part-time employees. Currently there are 6 vacant staff positions, 2 full-time and 4 part-time. When asked how hiring staff had been over the last 12 months, 1 center indicated it was somewhat difficult, and the other 2 reported it was very difficult. Comments received were:

- *Hiring quality staff has been hard. Often times, candidates do not show up for an interview or once hired are not able to fulfill the requirements by DHS (physical, background check, fingerprints, and new hire paperwork to begin employment.) The Center takes care of the background checks and fingerprinting costs. Candidates will accept another job offer that pays more.*
- *I get a lot of applicants however they do not meet many qualifications or are not a good fit for child care.*
- *People want to make more money.*

One home provider indicated they have 1 full-time and 2 part-time co-providers, assistants, or employees. During the previous 12 months, one home providers had 1 part-time staff or assistants leave, and none of the home providers currently have vacant positions. When asked how hiring has been over the last 12 months, all 4 home providers indicated they have not tried to hire. Comments received were:

- *I need varied hours and often only for an hour or 2 when my son or I have appointments or something. It would be nice if people could be background checked and approved by HHS to be a sub in any child care home.*

Table 33: Employees & Vacant Positions within Child Care Programs

	Full-Time Employees	Part-Time Employees	Full-Time Departures	Part-Time Departures	Full-Time Vacancies	Part-Time Vacancies
Licensed Center/Preschool	53	7	14	16	2	4
Registered Homes	1	2	0	1	0	0
Unregistered Homes	---	---			---	---

When asked if they had to limit enrollment or close a classroom due to not having enough staff during the last 12 months, all 3 centers and 1 home indicated yes. Comments received were:

- *Often times, we are not able to take more children due to ratio requirements. We have not had to close a classroom.*
- *2 days when illness swept through the center.*
- *Started the year with less than capacity in the baby room, unable to fully staff for 2 months.*

When asked if they had turned away families or put them on a waitlist due to lack of openings during the last 12 months, all 3 centers and 2 homes indicated yes. Comments received were:

- *I haven't had many calls since the beginning of this school year but before that I was turning away many calls per week. Some of them sounded so desperate and it broke my heart.*
- *I'm at my full capacity.*
- *Currently we are not turning anyone away due to staffing. I have hired many new part-time staff to be able fill any spots that we need. In the past two months I have hired 8 new part-time staff members. We are waiting on four of them to complete new hire paperwork in order to begin. Two of the eight have left employment due to another job with higher pay.*
- *We receive multiple calls a day wanting in to the program. We have 0 openings for all ages and have a waitlist with a minimum of 5 children on it for all age groups. No time frame of availability because we rarely have children leave the program.*
- *Several families with multiple children, may have room for one but not the other.*

One (1) center and 2 homes operate between the hours of 5:45 am and 6:15 pm (exact hours for each program vary), Monday through Friday, year-round. Another center operates 7:00 am to 5:30 pm, Monday through Friday, but during the school year only. The remaining 1 center offers extended hours, operating 6:00 am to 9:00 pm, Monday through Friday, year-round. One (1) home offers extended hours operating 5:00 am to 9:00 pm, 7-days a week, year-round. And the remaining 1 home operates 24-hours a day, 7-days a week, year-round.

Table 34: Child Care Program Operations

	Number of Centers	Number of Homes
Daytime, Weekdays, Year-Round	1	2
Daytime, Weekdays, School Year	1	---
Daytime + Evenings, Weekdays, Year-Round	1	---
Daytime + Evenings, 7-days, Year-Round	---	1
24-hours, 7-days, Year-Round	---	1

Child care providers were asked, when parents contact you about child care, which factor is most important, and were asked to select one from a multiple-choice list. While answers were nearly evenly distributed, there was a theme of tuition. Three (3) providers selected a factor that is related to cost, tuition, or financial assistance, of those 2 (29%) indicated tuition rates or price and 1 (14%) indicated tuition assistance or scholarships. Other factors were dependable provider/staff (29%), available space/timing of enrollment (14%), and part-time options (14%).
See table on next page.

Table 35: Factor Most Important to Parents Inquiring About Care

	Number of Providers	Percent of Providers
Available space/timing of enrollment	1	14%
Care includes preschool	---	---
Dependable staff or provider	2	29%
Drop-in or occasional care	---	---
Educational curriculum used	---	---
Evening or 2 nd shift care (after 7:00 pm)	---	---
Health and safety policies	---	---
Iowa Quality Rating System (QRS) rating	---	---
Location	---	---
Part-time options	1	14%
Positive interactions between staff and children	---	---
Second-shift care	---	---
Secured entrance	---	---
Special needs care	---	---
Third shift/overnight care	---	---
Transportation to and from school or preschool	---	---
Tuition assistance or scholarships	1	14%
Tuition rates or price	2	29%
Upkeep or appearance of the facility and playground	---	---
Weekend care	---	---

Many providers will participate in programs that improve business operations or provide funding to off-set costs. Providers were asked about multiple federal and state programs available to licensed centers, registered homes, and some unregistered homes. All of the programs indicated they are familiar with the Child and Adult Care Food Program (CACFP), and Iowa HHS Child Care Assistance. Most are either participating in or aware of the new Child Care Assistance pilot program for child care workforce and partner agreements to provide Universal Preschool (aka Statewide Voluntary Preschool Program for 4-year-olds), even if they have not participated.

Table 36: Child Care Programs Participation in Funding Opportunities

	Current or Past Participant	Aware of, But Never Participated	Not Familiar With/Not Heard Of
Child and Adult Care Food Program (CACFP)	2 centers 4 homes	1 center ---	--- ---
Iowa HHS Child Care Assistance	3 centers 4 homes	--- ---	--- ---
Child Care Assistance (CCA) Pilot Program for Child Care Workforce	3 centers 2 homes	1 home ---	1 home ---
Agreement with school to provide Universal Preschool (4-year-old preschool)	2 centers ---	1 center 2 homes	--- 2 homes

As a follow up, providers were asked about additional programs involving quality improvement, technology and staff education. Overall, providers are split between either being a participant or aware of the current opportunities. There was 1 home provider that reported they are not familiar with or had not heard of most of the programs.

Table 37: Child Care Programs Participation or Knowledge of State Programs

	Current or Past Participant	Aware of, But Never Participated	Not Familiar With/Not Heard Of
New IQ4K Quality Improvement Rating System	2 centers 1 home	1 center 2 homes	--- 1 home
TEACH Scholarship Program	2 centers 1 home	1 center 2 homes	--- 1 home
Child Care WAGE\$® salary supplement	2 centers ---	1 center 2 homes	--- 2 homes
FieldPrint Fingerprinting	1 center 1 home	2 centers 2 homes	--- 1 home
Current opportunity for HHS-funded monthly subscription fees for either Playground or brightwheel child care management software	--- ---	3 centers 3 homes	--- 1 home

Child care providers were also asked how many children enrolled in their program are receiving or are eligible for some form of financial assistance such as child care tuition assistance, the food program (CACFP), or other needs-based grants or scholarship programs. The centers indicated they have a collective total of 61 full-time enrollments (30% of all FT enrollments) and 31 part-time enrollments (57% of all PT enrollments). Three (3) homes had collective totals of 18 full-time enrollments (64% of all FT enrollments) and 7 part-time enrollments (37% of all PT enrollments). The remaining home indicated they have no children enrolled that are receiving or are eligible for any financial or needs-based programs.

Table 38: Enrollments Eligible for or Receiving Financial Assistance

	Total Providers	Eligible Full-Time Enrollment	Eligible Part-Time Enrollment	Total Eligible Enrollment
Licensed Center/Preschool	3	61	31	92
Registered Homes	3	18	7	25
Unregistered Homes	0	---	---	---
	6	79	38	117

Providers were asked a series of open-ended questions about being a child care provider, what they see for the future of child care, and to share other comments about child care. Each of these questions and responses are shared below.

Child care providers were asked if they had the opportunity, would they wish to expand their current child care program to serve more children. One (1) center and 2 homes selected “yes”.

Comments received from those indicating yes, were:

- *We would need funding to expand our current building or purchase/remodel a new site.*
- *Getting no phone calls for care.*
- *I would love to be registered as a Category B based on years of experience but I do not have my GED.*

Comments received from those indicating no, were:

- *I am happy to say we just expanded. :)*
- *The building is at its limit for square footage per child.*
- *I am only one person. I sometimes have to turn away families because times between day shift and evening shift would overlap by a half hour or so. I wish I had the ability to accept that responsibility for [short] periods of time but also understand why the numbers are what they are.*

If you wish to expand your program, what kind of support would you need in order to be able to serve more children? Comments received were:

- *Somehow have time while working to get my GED.*
- *I would like to be able to bring more awareness to our extended care program. This is a program that is at risk at this time due to low enrollment.*
- *Financial.*

What is the greatest challenge or barrier for expanding an existing child care program and what solutions would help? Comments received were:

- *Space, I'm only one person and cannot afford to pay an employee.*
- *The space in the home available to allow different age groups adequate space.*
- *I have to be available for all parents' schedules as most work different shifts. I [also] have bills to pay. I'd love to help more families by moving to category B but I do not have time to get my GED and work to support my family.*
- *Currently the school district offers youth programming during the school year as well as free programming during the summer. This has taken a drastic toll on our school-aged program.*
- *Financial and location opportunities.*
- *Funding.*

What is the greatest challenge or barrier for starting a new child care program, and what solutions would help? Comments received were:

- *Financial.*

How do you think the community could better support child care providers? Comments received were:

- *More families should qualify for CCA. Too many families make too much money to qualify but not enough to afford rent, utilities, food, and transportation. It's so hard to watch a single parent work so hard and make just over the maximum and yet every week they pay my fees because they know they need quality child care in order to work but then mention they have \$50 left for groceries and gas money. It's IMPOSSIBLE. If we truly are a society who value our children and our families, then why don't we help both parents and providers financially? Providers shouldn't be expected to provide quality care on below minimum wage profits and parents shouldn't have to pay a high percentage of their income for child care costs.*
- *Better supplemental wages for childcare workers as parents struggle to pay the fees.*
- *Funding through grants, fundraising, donations.*

What challenges do you see in the future for child care in Clinton and Camanche? Comments received were:

- *Not aware of CCRR child list of daycares available through DHS.*
- *A few really good providers have closed their child care homes and moved on to jobs making more money and working far fewer hours doing something that doesn't take over the house. If they were valued and could've made a more respectable profit, then we'd still have them providing care.*
- *Not having kids to fill open spots with families that can afford the fees for childcare.*
- *CCA does not pay enough, parents who need help can't afford much [of a] co-pay. Providers have bills and families to support also.*
- *Staffing and a need larger than what is available.*
- *Dependable workforce.*

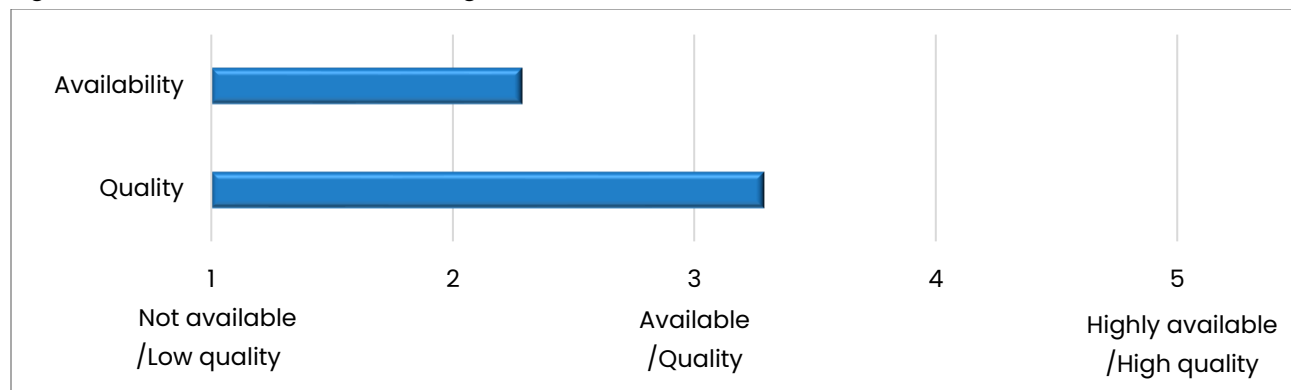
What opportunities do you see in the future for child care in Clinton and Camanche? Comments received were:

- *There are none.*
- *I'm sure we'll continue to have the low paying jobs with high expectations and then act surprised that so many in this line of work will leave for a job they can better house and feed their families with.*

Child care providers were asked to rank the *availability* of child care in Clinton and Camanche on a scale of 1 to 5, with 1 being not available, 3 adequate, and 5 highly available (the higher the

score, the more available). The weighted average was 2.29. Providers were then asked to rank the *quality* of child care in Clinton and Camanche on a scale of 1 to 5, with 1 being low quality, 3 quality, and 5 high quality (the higher the score, the higher quality). The weighted average was 3.29.

Figure 3: Child Care Provider Ratings of Child Care in Clinton and Camanche



The final question allowed providers to share any additional comments they had about child care in Clinton and Camanche. Comments received were:

- *There is not enough child care openings. Where there are openings, staffing is inadequate and [there are] concerns about safety and quality of care within centers in Clinton and Camanche.*

Parent Survey Results

A total of 145 individuals accessed the parent survey. Of those, 52 were “disqualified” because they either do not have children or they indicated they have children but do not use child care and do not plan to. An additional 30 individuals began but did not submit their survey. A total of 63 individuals fully completed the survey. This group was filtered and only responses from those that indicated they prefer to use child care located in Clinton or Camanche were used. This group was then filtered again to separate “current parents” those that currently have children age 12 or younger, and “future parents” those that do not have children today but plan to have or adopt within the next 5 years. Current parents completed questions that provide information about both their current and future child care needs, while future parents completed only questions about their future child care needs. Some questions were required while others were not, therefore responses from all questions are included in the aggregate data, even if an individual did not complete all survey questions. There was a total of 56 current parents and 1 future parent. Due to the low number of responses and to maintain confidentiality, the responses of the future parent are not included in this report.

Using the most popular responses, a current parent would be described as married (79%) and living in the Clinton zip code (52732) (67%). They work first-shift Monday through Friday (89%) in Clinton or Camanche (91%), and the nature of their job is finance & insurance (23%). Their spouse also works first-shift Monday through Friday (64%) in Clinton or Camanche (68%), and the nature of their job is other services (30%). They currently use child care in Clinton (80%), Monday through Friday. They use child care 40 to 49 hours per week for their children age 0 to 5 (39%), less than 10 hours per week for before and after school care (64%), and 40 to 49 hours per week for school age children during the summer (32%). They are satisfied with their current child care provider (84%).

Parents were asked where they live. Sixty-seven percent (67%) indicated they live in Clinton, while 25% live in Camanche, and the remaining 10% live in Illinois or selected “other” and did not specify where.

Table 39: Parents’ Place of Residence

	Percent of Parents	
Clinton (52732 zip code)	37	67%
Camanche (52730 zip code)	14	25%
Albany, IL (61230 zip code)	1	2%
Fenton, IL (61251 zip code)	1	2%
Fulton, IL (61252 zip code)	1	2%
Thomson, IL (61285 zip code)	1	2%
Not specified	1	2%

Parents that live outside of the Clinton and Camanche zip codes were asked if the availability of child care in Clinton and Camanche influenced their decision to live elsewhere. All 5 answered no.

In a separate question, parents were asked what school district their children are or are most likely to be enrolled in when they are old enough. Fifty percent (50%) of parents indicated Clinton CSD, followed by Camanche CSD (27%), and Northeast CSD (7%), the 3 public school districts that serve the market area. Prince of Peace, the provide school in Clinton, was indicated by 5% of parents. The remaining 11% have children enrolled, or plan to enroll their children, outside the market area.

Table 40: School District

	Percent of Parents	
Clinton Community School District	28	50%
Camanche Community School District	15	27%
Northeast Community School District	4	7%
Prince of Peace Catholic School, Clinton	3	5%
River Bend School District, Fulton, IL	2	3%
Camanche or Northwest	1	2%
DeWitt or Northwest	1	2%
Erie Community Unit School District, Erie, IL	1	2%
West Carroll Community Unit School District, West Carroll, IL	1	2%

The most common industry or occupational nature of the individual completing the survey (self) was finance & insurance (23%). The most common occupation for their spouse or partner was other services (30%). *See Table 41 on next page.*

In a separate question, parents were asked if their job is located in or if they do most of their work in either Clinton or Camanche, 92% indicated yes for their own job and 70% for their spouse's or partner's job. *See table 42 on next page.*

Table 41: Nature of Job or Occupation

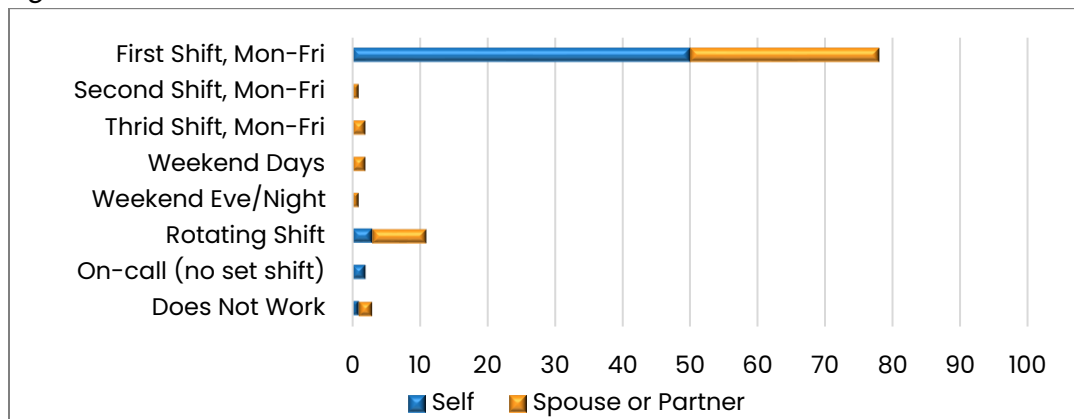
	Self	Spouse or Partner
Accommodations & Food Service	2%	2%
Administrative & Waste Management	2%	---
Agriculture, Fishing, Hunting	---	7%
Arts, Entertainment & Recreation	---	---
Construction	---	5%
Educational Services	16%	2%
Finance & Insurance	23%	2%
Health Care & Social Assistance	11%	11%
Information	---	---
Management of Companies	2%	---
Manufacturing	5%	23%
Mining, Quarrying, & Oil & Gas	---	---
Professional, Scientific & Technical	9%	7%
Public Administration	2%	---
Real Estate, Rental, Leasing	---	---
Retail Trade	5%	5%
Transportation & Warehousing	4%	---
Utilities	---	2%
Wholesale Trade	---	---
Other Services	18%	30%
Do not work	2%	5%

Table 42: Town Where Job is Located

Town	Percent of Parents	
	Self	Spouse/ Partner
Clinton or Camanche	92%	70%
Bettendorf	---	2%
Carroll County, IL	---	2%
Cordova, IL	2%	---
Davenport	2%	9%
DeWitt	---	2%
Fulton, IL	---	5%
Low Moor	---	2%
Quad Cities	2%	5%
Thomson, IL	---	2%
Doesn't work	2%	2%

The majority of current parents and their spouse or partner work first-shift, Monday through Friday, with 89% for self and 63% for spouse or partner. The next most common work schedule is rotating shift, with 5% for self and 18% for spouse or partner. See figure on next page.

Figure 4: Current Parent Work Schedules



The most common child care related benefit offered by employers is dependent care flex spending accounts, which was selected by 34% of parents. Other benefits offered included flexible work schedules if the family's regular child care arrangement is not available, and work from home options if regular care is not available. Approximately 34% of parents indicated neither their employer, nor their spouse's or partner's employer offers any of these benefits, while 13% were unsure.

Table 43: Child Care Related Benefits Offered by Employer

	Percent of Parents
Dependent Care Flex Spending Accounts	34%
Financial assistance to help employees pay for child care	2%
Flexible schedule if regular care is not available	32%
Work from home options if regular care is not available	16%
Child care information included in employee orientation	---
Child care information included in employee handbook	2%
Other	5%
Unsure if employer offers any of these	13%
Employer does not offer any of these	34%

Those that selected other were asked to explain. Comments received were:

- *Flexible schedule is normal here, but the current boss allows it.*

Parents were asked, as of today are they or their spouse or partner is not working (unemployed) because of child care challenges. Eleven percent (11%) said yes. Comments received were:

- *Only able to work certain shifts.*

Parents were asked if child care challenges are currently limiting their or their spouse's or partner's employment (ex. Working part-time when full-time preferred or not working within preferred field). Twenty-three percent (23%) indicated yes. Comments received were:

- *With the cost of daycare, I try and work longer hours so my wife can pick kids up early to try and save money.*
- *Childcare is expensive so I have worked out a schedule for work with my employer, so I only have to pay for daycare 3 days a week.*
- *No but if I had not secured a spot in daycare, I would have had issues.*
- *He's currently staying at home, since I got a steady job with benefits. We are managing bills, and since daycare is expensive, is not that bad that he doesn't work full time.*
- *Can't afford the cost so staying at home until baby is one year old.*
- *I am limited to my hours and days I can work due to unreliable daycares and daycare closures.*
- *Yes, I have had to miss several days of work due to not having child care or my child being sick. I was fired from my last job for missing too many days. I took another job with a pay cut.*

Parents were asked if they or their spouse or partner had declined employment or withdrawn from the workforce during the last 12 months due to child care. Fourteen percent (14%) said yes. Comments received were:

- *Not enough PM daycare.*
- *My wife has considered other jobs, but only works 2 to 3 days per week currently and we only need 3 days of child care per week. If we needed more than 3 days, we would have to go full-time for child care which is more expensive and might offset one of the primary advantages of a new job.*
- *Used vacation and/or sick time when childcare was unavailable.*
- *Couldn't take a different job due to no childcare available in that area.*
- *To be able to accommodate my child's schedule, my partner stays home and works for Uber when possible.*

Parents were asked to indicate how many children were living in their household by age. The "Households" column of the following table shows how many parents indicated they have at least one child in each age group, while the "Children" column reflects how many total children are represented in the survey. Because some households have children in each age group, the household's column may be duplicative and therefore cannot be totaled. A total of 106 children are represented in the survey. In addition to the children represented here, 34% of parents (19 individuals) indicated they plan to have or adopt more children in the next 5 years. See *table on next page*.

Table 44: Children Represented in Parent Survey

	Households	Children
0 to 5 (not started Kindergarten)	47	69
5 to 12	26	37
Total	N/A	106

Sixteen percent (16%) of parents indicated that the availability of child care in Clinton and Camanche has impacted their decision to have or adopt children or caused them to limit the size of their family. Comments received were:

- *Too expensive to put another in daycare and I don't want to be a stay-at-home parent.*
- *Yes, the cost of adding another kid to the bill.*
- *Cost.*
- *It's already difficult finding care for 1 child.*
- *I do not want more children. I wouldn't want to go through that need again trying to fiddle all that comes with having a job and juggling being a mom for a baby.*
- *It is not the main concern with limiting family size; however, it is definitely a concern.*

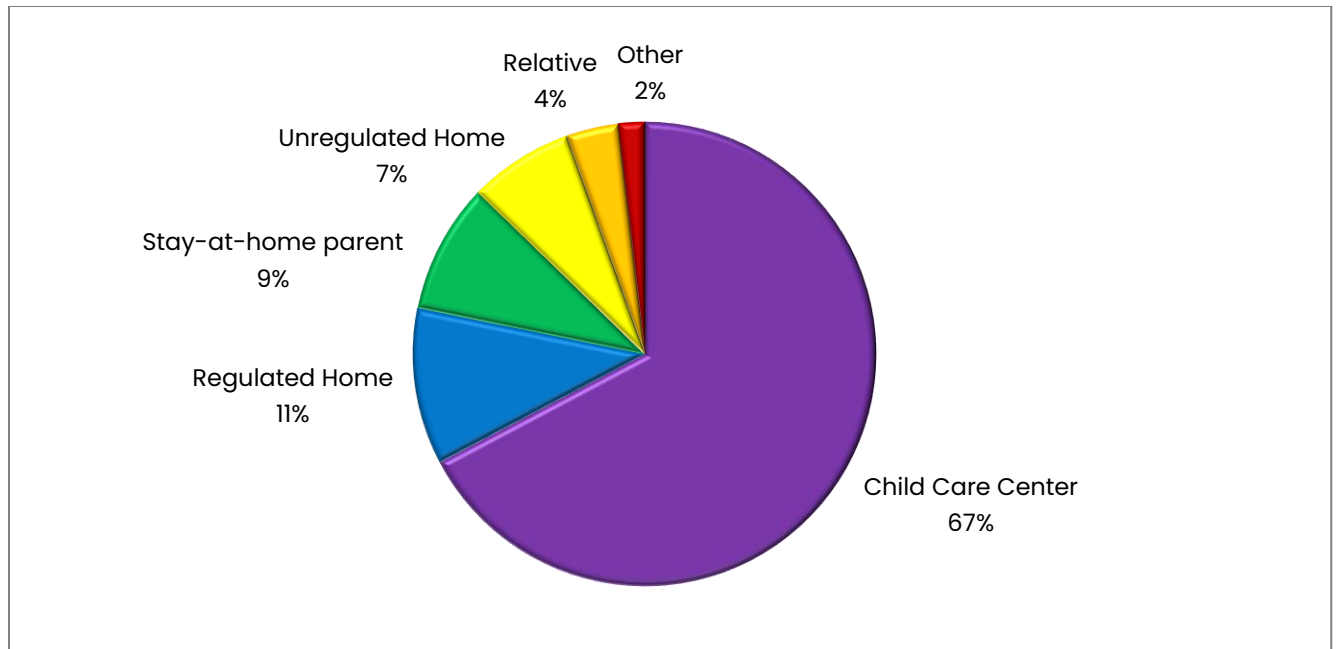
When asked about their current child care situation, 88% of parents indicated they are using an "outside" child care arrangement such as a center or home provider, with a formal arrangement. Five percent (5%) are using a relative with no formal arrangement and no money exchanged, 5% a stay-at-home or work-from-home parent, and 2% are not using any form of child care. Those that are not currently using outside child care were asked if they are likely to in the next 5 years, all parents indicated yes.

When asked to provide more specific details about their primary child care setting during the last 12 months, 67% of parents indicated they are using a child care center. Other settings being used are regulated home (11%), stay-at-home parent (9%), unregulated home (7%), relative (4%), and other (2%). Those selecting other indicated they use a before/after school program. See figure on next page.

Comments received were:

- *I have a mixture of center and family support.*
- *A mix of child care center (Iowa HHS licensed) and my spouse staying home with the child.*
- *Before/After school program.*
- *I use a child care center regulated by DHS and I also call-off from work when that daycare is closed, to take care of my child.*

Figure 5: Primary Care Setting Used During the Last 12 Months



A list of possible effects child care challenges may have had on parents' jobs was presented, and parents were asked to select all that apply to their own or their spouse's or partner's employment in the last 12 months. The most common effects were: had to leave work early (53%), followed by missed a day of work because provider was closed, on vacation, or not available (35%), and had to supervise child while working from home (33%). Twenty-four percent (24%) of parents indicated they experienced no issues related to their job due to child care. *See table on next page.*

Table 45: Effects of Child Care Challenges on Job

	Percent of Parents
Missed a day of work because provider was closed, on vacation, or not available	35%
Missed a day of work because the provider did not have room or space for child	8%
Did not accept a desired job offer	14%
Arrived late to work	29%
Had to leave work early	53%
Unable to work overtime	24%
Unable to travel for work	14%
Lower productivity	12%
Unable to accept a different work schedule or shift	20%
Had to reduce the number of hours worked	18%
Received disciplinary action (not including firing)	6%
Quit a job	6%
Got fired	2%
Considered changing jobs to one that works with child care	18%
Had to change jobs to one that works with child care	4%
Took a job that does not fit my/their skills	---
Had to leave child home alone to go to work	4%
Had to take child to work with me/them	24%
Had to supervise child while working from home	33%
Other (see comments below)	6%
Experienced no problems related to work and child care	24%

Comments received from parents selecting "other" were:

- *Have changed my schedule at work to limit the days my child goes to childcare, so it is easier to afford. (Part time instead of full time)*
- *Affordable after-school care or transportation between Camanche to Clinton is hugely needed.*

Thirty-seven percent (37%) of current parents indicated that there are changes that could be made to their current child care arrangements that would allow them to perform better at work.

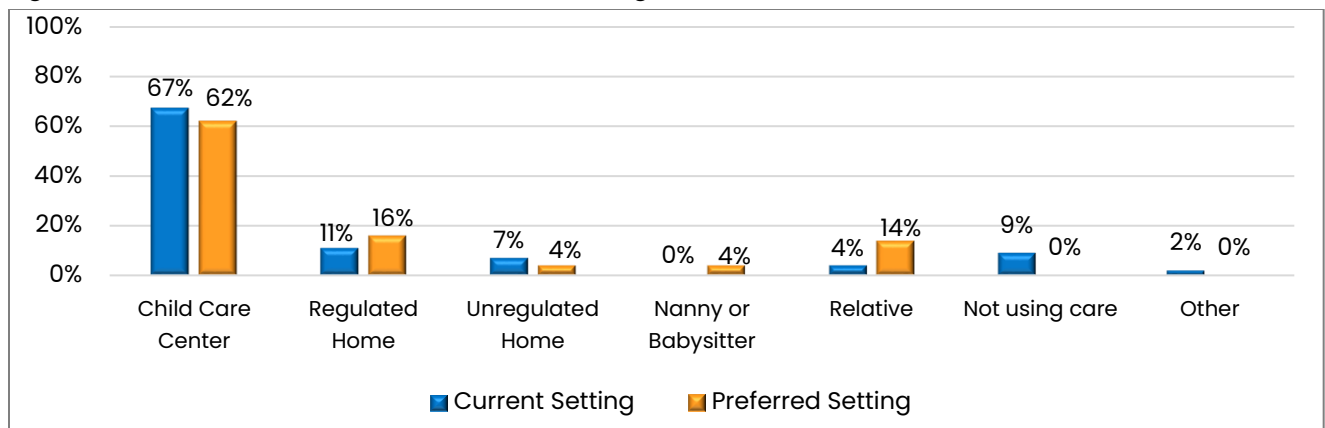
Comments received were:

- *Weekends.*
- *Cheaper rates.*
- *Open earlier than 7:00.*
- *Lower cost to make it more affordable. It's hard to make ends meet on 2 incomes as it is but to practically have one income going to child care and the other for bills makes working just to pay child care.*

- *Not realistic ones. If the price of part-time and full-time was no different that would be one (but isn't realistic). If the center didn't make the child go home for minor illnesses (but that's to protect staff and other kids).*
- *Number of required days.*
- *Backup providers.*
- *Affordable after-school program offered in Camanche. I've been on the waiting list for 2 years. Or transportation from Camanche Elementary to Clinton.*
- *Cost.*
- *Work needs to adjust to child care. Jobs are unfriendly to working parents.*
- *If they had a program right at my daughter's school, there would be less shuffling back and forth.*
- *Availability and flexibility in child care options.*
- *If I went to child care facility I would assume not as much as a problem, but we use in home childcare.*
- *My child care center is only open during the school year, I wish it would be open year-round. I then have to coordinate in-home care for the summer months with various teachers from the center.*
- *Discounted price.*
- *Open earlier, close later, take more than a select number of kids at a time. Not close randomly and notify you an hour before they open.*
- *My daycare provider is great but when she is closed for holidays, vacation, training days or illness it is very hard to find a backup sitter. Having more daycares with more openings that aren't closed as often would be great.*

Parents were asked if all choices were available and you were selecting child care today, which setting would you most prefer. The top choice was a licensed center (62%), followed by regulated home provider (16%), and a relative (14%). Overall, 79% of parents prefer a child care setting that is regulated by Iowa Department of Health and Human Services (HHS)– either a licensed center or a regulated home. The following figure shows a comparison of the child care settings currently being used by parents vs. their preferred setting if they were to select care today. See figure on next page.

Figure 6: Current vs. Preferred Child Care Setting



Overall, 78% of current parents indicated their children are already enrolled in their preferred type of care. Those that are not, were asked the primary reason. The most common reason selected was other (8%), those parents were asked to specify why, however comments provided lacked enough detail to determine the reasons. Other reasons were provider not accepting enrollments (4%), and not able to afford (4%).

Table 46: Reason Children are Not in Preferred Type of Care

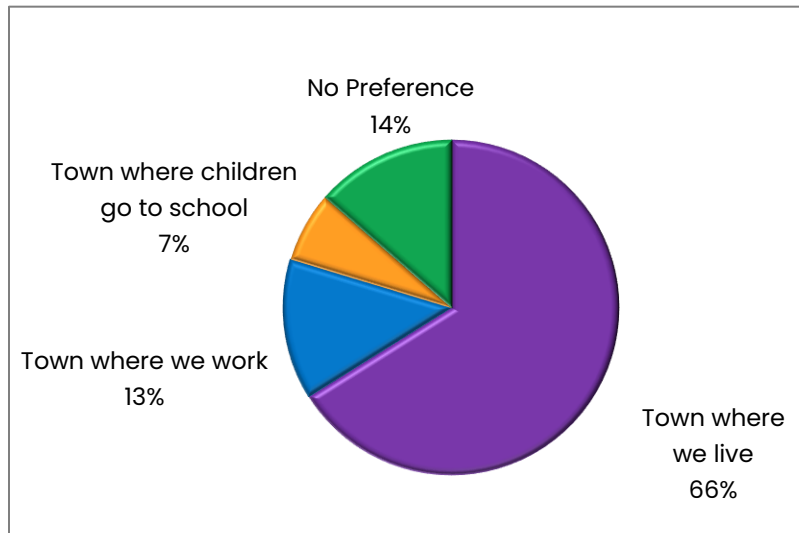
	Total
Provider not accepting enrollments	4%
Location too far away	2%
Not able to afford	4%
Not conveniently located	---
Not open for extended or nontraditional hours	---
My children are not the right age for preferred arrangement	2%
Transportation to and from school/preschool not available	2%
Other (see comments below)	8%
Children are in my preferred type of care	78%

Comments from those selecting other were:

- *No currently employed.*
- *We love our daycare center, but the prices are very expensive.*

Respondents were asked their preference of proximity if they were selecting care today. The most preferred proximity is the town where they live (66%), followed by no preference (14%), town where we work (13%), and town where children got to/will go to school (7%). See figure on next page.

Figure 7: Preferred Proximity of Child Care



Parents were also asked which community their current child care provider is located in, and if they were selecting care today which community they would prefer. Overall, 18% of parents are currently using care in Camanche, but 23% would prefer to. Currently 80% of parents are using care in Clinton, and 75% would prefer to. There was 1 parent (2%) that noted their preference is “either city, as I work in Camanche, and husband works in Clinton”. (That parent is currently using care in Clinton).

Table 47: Location of Child Care

	Current Location	Preferred Location
Camanche	18%	23%
Clinton	80%	75%
Fulton, IL	2%	---
Either Clinton or Camanche	---	2%

Parents were asked several questions about the average number of hours of child care used per week, preferred child care schedule, and current and preferred drop off and pick up times. The largest group of parents with children ages 0 to 5 are using between 40 and 49 hours a week (39%). When it comes to school age children, parents use less than 10 hours per week during the school year (64%), and 40 to 49 hours a week during the summer (32%).

Table 48: Average Hours per Week Child Care Currently Used

	Less than 10 Hours	10 to 19 Hours	20 to 29 hours	30 to 39 hours	40 to 49 hours	50 or more
Age 0 to 5 (not Kindergarten)	5%	2%	32%	17%	39%	5%
Age 5 to 12 during school year	64%	27%	0%	0%	0%	0%
Age 5 to 12 during summer	9%	0%	32%	23%	32%	5%

Currently, the most popular hour to drop-off children is from 7:00 am to 7:59 am (64%) (32 parents), followed by 3:00 pm to 3:59 pm (8%) (4 parents), and 8:00 am to 8:59 am (6%) (3 parents). When it comes to picking-up children, 37% of parents are currently picking-up between 4:00 pm and 4:59 pm (19 parents), followed by 22% picking-up between 5:00 pm and 5:59 pm (11 parents). In addition, 16% indicated their preferred pick-up time as 4:00 am to 4:59 am (8 parents) and 6% selected 5:00 am to 5:59 am (3 parents). Because 89% reported their normal work schedule as first-shift and 64% reported their spouse's or partner's work schedule also as first-shift, it is likely some of these parents pick-up their children between 4:00 pm to 5:59 pm, rather than 4:00 am to 5:59 am.

Parents were also asked their preferred drop-off and pick-up times. Currently, the most preferred drop-off time is 7:00 am to 7:59 am (63%) (34 parents), followed by 6:00 am to 6:59 am (17%) (9 parents). When it comes to picking-up children, the most preferred time is 4:00 pm to 4:59 pm (36%) (20 parents), followed by 5:00 pm to 5:59 pm (25%) (14 parents). Again, some parents may have selected the wrong time of day, indicating they prefer to pick up their children between 4:00 am to 5:59 am (20%) (11 parents), rather than 4:00 pm to 5:59 pm, despite indicating their job is first-shift.

Figure 8: Drop-off Times of Current Parents

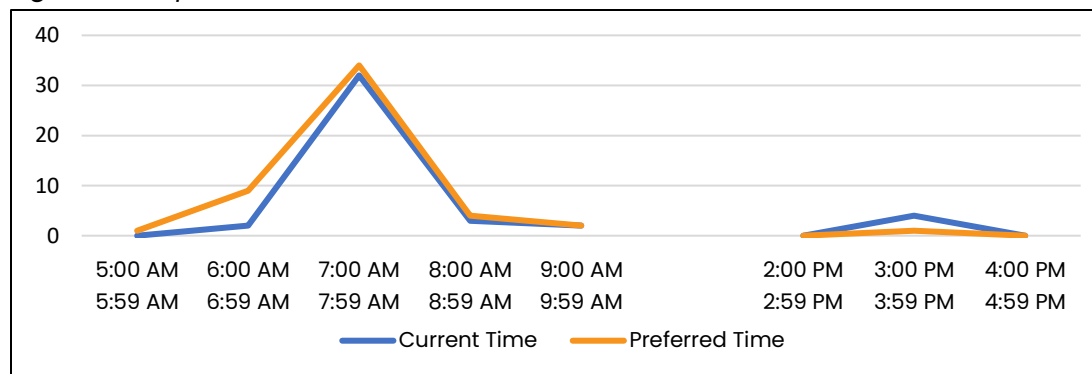
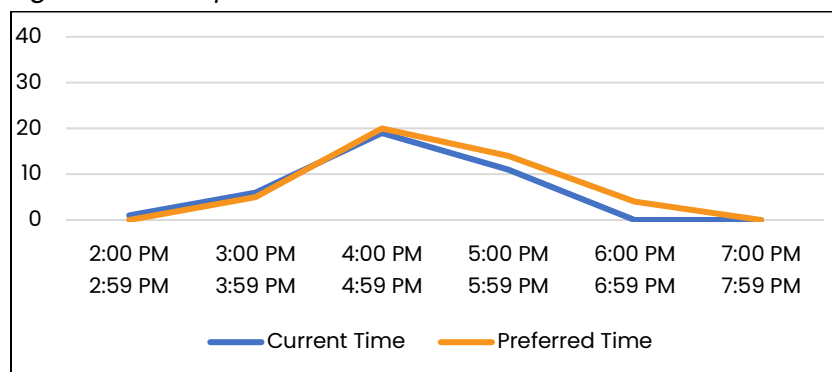
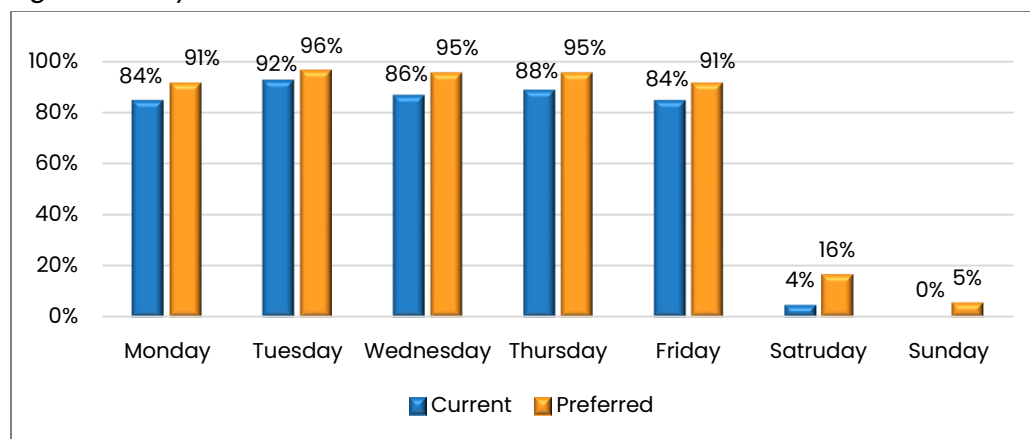


Figure 9: Pick-Up Times of Current Parents



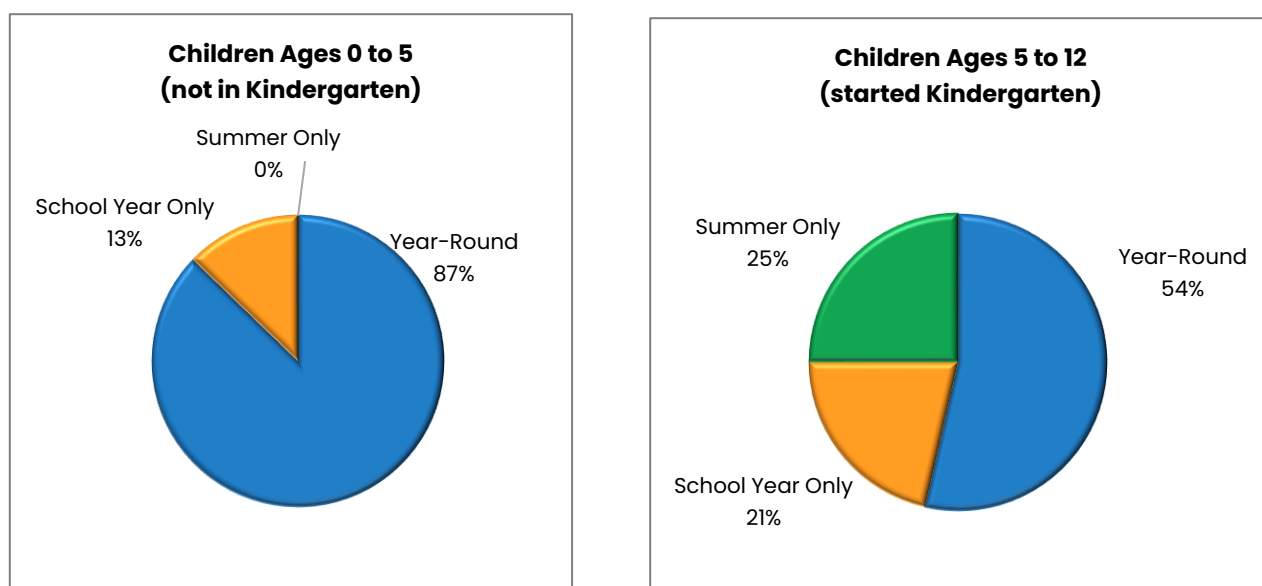
Most parents indicated they currently use care Monday through Friday (ranging from 84% to 92% per day), while 4% use care on Saturday and 0% on Sunday. When it comes to preferred days for care, Monday through Friday are still the most preferred, ranging from 91% to 96% per day. Meanwhile, 16% prefer Saturday care, and 5% prefer Sunday care.

Figure 10: Days Parents Use Child Care vs. Prefer to Use Child Care



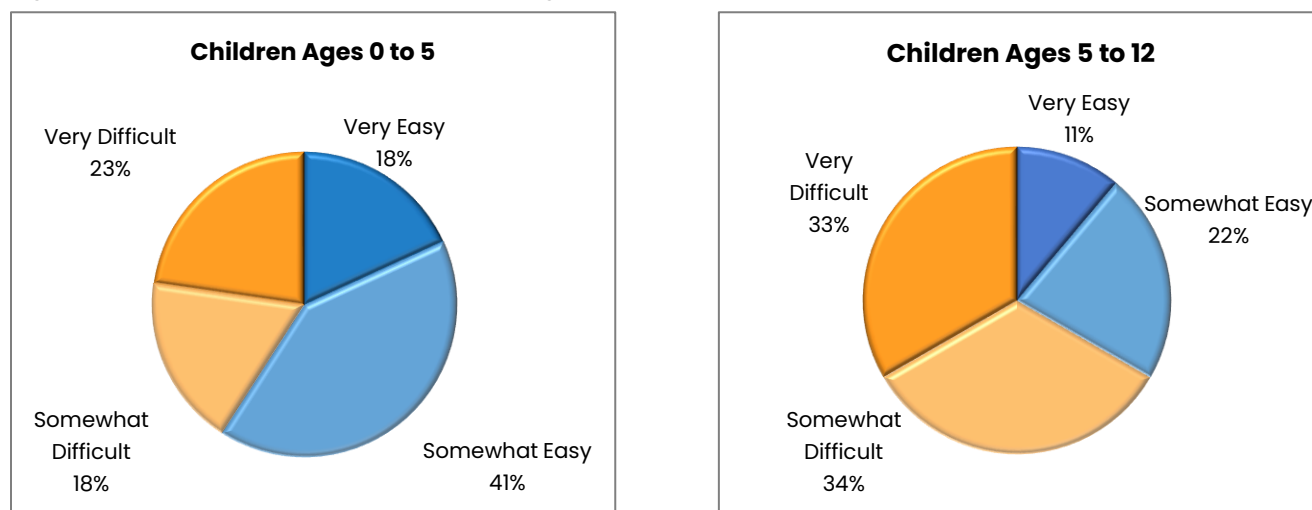
When asked what their preferred time of the year would be if they were selecting child care today for ages 0 to 5, 87% of parents prefer year-round care, while 13% prefer school year only, and 0% prefer summer only. When asked what their preferred time of the year would be if they were selecting child care today for ages 5 to 12, the majority, 54%, prefer year-round care, while 21% prefer school year only, and 25% prefer summer only.

Figure 11: Time of Year Families Prefer to Use Child Care by Age Group



Parents were asked if they had looked for child care in the last 12 months. Among the 22 parents that had looked for care for children ages 0 to 5, 41% indicated they experienced some level of difficulty—either somewhat difficult (18%) or very difficult (23%). And among the 9 parents that looked for care for children ages 5 to 12, 67% indicated they experienced some level of difficulty—either somewhat difficult (34%) or very difficult (33%).

Figure 12: Ability to Find Child Care During Last 12 Months



Parents that had looked for care in the last 12 months were asked what obstacles they had experienced. Eleven (11) parents provided comments about the obstacles they experienced. Comments received were:

- *We wanted to use a center because we don't know any of the individual providers. Many of the centers in town had waiting lists at least a year and a half in length. We ultimately settled at [center name], but I'm not sure if that would've worked without me having a connection to [center name] staff.*
- *Openings at a childcare facility.*
- *In-home didn't have openings; business-ran day cares didn't have desirable hours/cost for my family.*
- *Many places had waiting lists for the ages of my children.*
- *I've been on the waiting list for Camanche's After School Program for 2 years.*
- *Finding childcare that was a good fit for our child and for our work schedules.*
- *Keeping my daughter at the daycare she had been in since she was 6 months wasn't possible due to transportation complexities. After 1 month of looking for after school, the teacher mentioned there was a program at the same school. Luckily, my daughter found a spot.*

- *I have to coordinate in-home care for the summer months with various teachers from the center since they are not open. Clearly the teachers need to work just as much as working parents need childcare.*
- *Daycares being full, too expensive.*
- *No daycare facility has room for children. They are fully booked for months out.*
- *One, most centers have waitlists. When my two-year-old was infant, I called all the centers and they all said they had a year to waitlist. I looked for in-home daycares and found a few but the quality, care, safety and supervision was lacking at 2 of the 3 I contacted. I finally settled on [home provider's name] who has an in-home daycare. But she is frequently closed for holidays (13 per year), 2 weeks paid vacation, one week paid personal days, and one-week unpaid personal days. This equals about 35 days or 4-5 weeks per year she is unavailable, and I only get 2 weeks of PTO. It is very, very hard to find someone to fill in those days she is closed.*

Despite difficulty finding care, once families find care, they are satisfied with their provider.

Overall, 84% of current parents indicated they are satisfied with their current provider, while 16% are not. Those that indicated they are not satisfied with their current provider were asked to explain. Comments received were:

- *No, currently paying a high schooler to pick my son up from school and drive him home. High Schoolers are not always very dependable.*
- *Mercy One is outstanding.*
- *I believe there is a lack of appropriate supervision for the children.*
- *My current childcare provider is [a relative] which has been wonderful that she has an in-home day care because we get a discount for our child. However, she cancels last minute or with little notice and takes off weeks at a time over the holidays which makes it extremely difficult for my husband and I to make work since he works swing shifts and I work straight days.*
- *With in-home child care you are on someone else's days off and vacation schedule.*
- *Not open during summer months, otherwise, highly satisfied with Prince of Peace daycare.*
- *I like the current child care but it's very expensive.*
- *They close all the time with an hour before they are supposed to open leaving no time to find someone else. Always sending kids home for no reason.*
- *I wish she wasn't closed so much or had a backup option.*

Respondents were given a list of factors that are often important to parents when choosing child care and told to select all that apply to them. The top choices were health and safety policies (86%), followed by available space/timing of enrollment (80%), dependability (80%), and positive

interactions between staff and children (80%). Parents were then asked to select the single factor that is most important to them. The most important factor is positive interactions between staff and children, which was selected by 38%.

Table 49: Important Factors When Selecting Child Care

	Current Parents	
	All Factors that are Important	Single Most Important
Available space/timing of enrollment	80%	7%
Care includes preschool	46%	2%
Dependability	80%	16%
Drop-in or occasional care	48%	0%
Educational curriculum used	70%	4%
Health and safety policies	86%	20%
Iowa Quality for Kids (IQ4K) quality rating system	20%	0%
Location	79%	4%
Part-time options	48%	0%
Positive interactions between staff and children	80%	38%
Second shift/evening care	18%	2%
Secured entrance	59%	2%
Special needs care	4%	0%
Third shift/overnight care	9%	0%
Transportation to and from school or preschool	39%	0%
Tuition assistance or scholarships	16%	0%
Tuition rates or price	48%	7%
Upkeep or appearance of the facility and playground	63%	0%
Weekend care	18%	0%

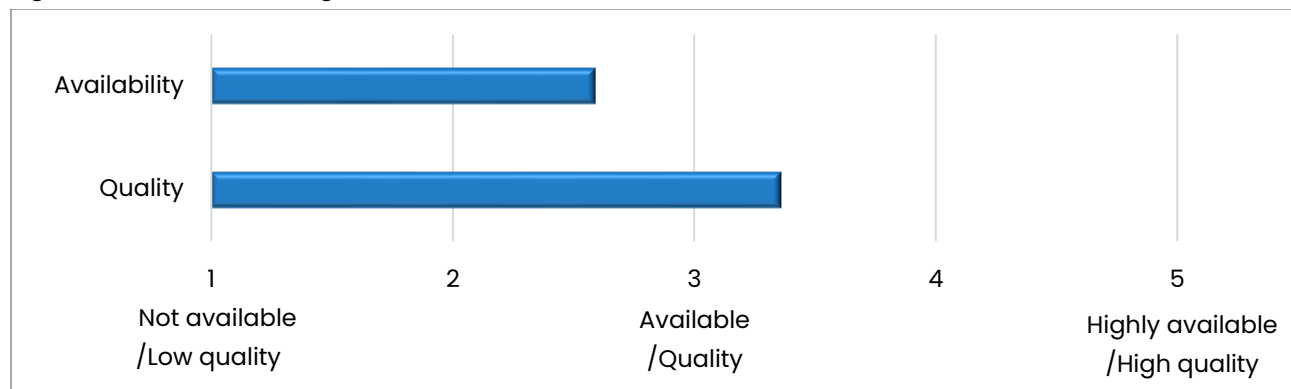
Responses were sorted to take a deeper look at those that indicated second shift or third shift care is an important factor to them. Of the 56 parents that participated, 10 parents (18%) indicated second shift is an important factor, and 5 of those also indicated third shift is an important factor. Among those 10 parents none indicated they currently work second shift or third shift, although one does work on an on-call basis. When it comes to their spouse's or partner's work schedule, 1 indicated their spouse or partner currently works second or third shift, while 2 work a rotating shift, and 1 works weekend days. Among the 10 parents that indicated second shift or third shift is important, only 1 indicated they are not currently in their preferred child care arrangement, however the reason was due to the child's age not the hours of care.

When parents that indicated that second or third shift care is important to them were asked what hours they prefer to use child care, all 10 parents indicated they prefer to drop off their child at varying times between 6:00 am and 9:00 am. When it comes to picking up their children, 8

prefer to pick up by 6:59 pm, 1 indicated they prefer to pick up at 9:00 pm, and 1 indicated they need care for 24-hours (6:00 am to 5:59 am). When it comes to open-ended questions where parents could provide detailed information about their own child care needs (not general statements about child care in the area), there were no comments that indicating these parents personally need extended hours (past 6:30 pm) or overnight care. There was 1 comment indicating the parent would like their current provider to open earlier than 7:00 am.

Parents were asked to rate the availability of child care in Clinton and Camanche on a scale of 1 to 5, with 1 being not available, 3 available, and 5 highly available (the higher the score, the more available). The weighted average was 2.59. Parents were then asked to rate the *quality* of child care in Clinton and Camanche on a scale of 1 to 5, with 1 being low quality, 3 quality, and 5 high quality (the higher the score, the higher quality). The weighted average was 3.36.

Figure 13: Parents' Ratings of Child Care in Clinton and Camanche



At the conclusion of the survey, parents were asked several open-ended questions about child care. Each question and the responses received are on the following pages.

What do you think is the biggest challenge facing parents regarding child care, and what will resolve that challenge? Comments received were:

- *Expense and availability.*
- *Places to go.*
- *Too expensive. If the [dependent care flex spending account] FSA allowance was larger.*
- *The availability, we were on many waitlists for a while before a spot opened. If you need to start childcare or change hours at short notice it can be very difficult to find. Having more facilities/staff/space to accommodate more children.*
- *Short staffed - higher wages.*
- *We were lucky and were able to get our youngest into childcare due to his older brother being there. I know others with children under one struggle to find care at times.*
- *Reasonable rates for childcare.*

- Availability, price, hours.
- The biggest challenge facing parents regarding childcare in this area is availability. I have heard from every person I know that they can't get childcare because there is no availability and wait lists are full.
- Availability. Funding.
- The economy. The prices of everything are going up, but yet our paychecks aren't. America is going through a hardship at this time due to inflation.
- School age children get out of school before middle school and high school siblings which doesn't allow for any older siblings watching younger siblings after school. As a single mom I either pay for daycare or decide if my child is old enough to stay home alone. This was a step backwards for our district!
- Lower cost.
- More hours available for child care.
- Availability. Part-time options. Cost.
- Cost.
- The amount we pay for childcare seems outrageous.
- There are limited options for school aged kids in the summer that are affordable. We used the Clinton Parks and Rec program last summer which was a bit of a drive from Camanche. Also had issues since my child has special needs and they didn't seem equipped.
- Finding affordable care excepting children, when and where needed.
- Cost.
- The cost of childcare.
- Availability and reliability.
- Work needs to be more accommodating. Increased pay or help with childcare. More time off for when kids are sick. Daycares can't operate if everyone is sick. Work needs to be more kid friendly.
- COST!
- You are limited on your options. You have to accept availability over quality sometimes and this is the most important factor, someone caring for your kids, that as a parent you are put in a terrible position. Also, not everyone needs a full week spot so if you are part time, they are less likely to want to hold a spot as it is less money for them.
- Price. Childcare is quite expensive and even with an income that can support it, we struggle some months.
- Cost of childcare.
- Having more facilities with an appropriate number of care providers. Also having to pay when the child is not there.

- *The cost of childcare is outrageous. For two children to go to a center it costs between \$400-\$500/week. That is between \$1,600-\$2,000/month. A lot of working parents cannot afford that. With the continued rising cost of household essentials and food and anything you need to live, having one parent stay home and one working parents isn't feasible and the cost of childcare makes it almost impossible for a mom (typically) to bring home any other money besides the cost of childcare which in turn means the moms (typically) decide to stay home to help save the cost of childcare which makes it hard to pay household bills.*
- *Cost and availability.*
- *Holidays and when the kids are sick. I'm not sure what would fix it.*
- *Not my issue, but I have seen comments on time of day/shift openings not available.*
- *Cost of child care and times open. Some day care providers are only open until 3:00 or 4:00.*
- *Available openings at child care-more quality and available staff.*
- *Affordability and quality.*
- *Affordability. For one toddler the going rate around town is \$210 a week for a licensed center. When thinking of growing families that do not qualify for assistance, this financial burden can be heavy. Additionally, child care workers are not paid fair wages for all that they do. It will take government and our lawmakers to realize child care is literal infrastructure. Without childcare, parents cannot work just as if without roads and bridges, we cannot work. The mindset of care giving needs to do a 180 turn.*
- *Price.*
- *It's difficult for parents to get a good, stable job when they can't find good, trustworthy and reliable childcare. Opening up more daycares that are affordable and reliable would help tremendously.*
- *Not enough facilities, having more or more teachers/space at current ones.*
- *Pricing, and availability.*
- *The ability to get a spot in a daycare.*
- *There are not enough daycares in town, and it is very expensive.*

The next question asked, what opportunities do you see for the future of child care in either Clinton or Camanche, or both? Comments received were:

- *I haven't heard of any.*
- *More locations or make current daycares larger.*
- *There needs to be more high-quality daycare centers so that there's a bit of price competition to drive down prices and so that there's more than one great choice.*
- *Turning abandoned buildings into child care centers.*

- *A dedicated page/site for parents to use when moving to the area or deciding to get back into the workforce. It is challenging to find a list of providers (I have not looked in a while so this may have changed).*
- *Options for more PM availability, opening new centers.*
- *I see a large opportunity for more child care centers. The area is in dire need of more child care centers. This would also provide employment opportunities for the area as well.*
- *Not sure what the need is for second shift and weekend availability but it's definitely something to explore. Also, more options for school age, the after-school program at the school costs more than I pay at my daycare a week with less flexibility.*
- *It would be great if there was a facility that offered child care 24/7.*
- *The need is high, and the number of providers seems to be low.*
- *New facility partnered with industry/employers.*
- *New centers open up.*
- *An affordable summer program in Camanche.*
- *I hear that for a lot of parents that they have the same problems I do. Offering transportation from Camanche schools to Clinton would be greatly beneficial.*
- *Not sure.*
- *Having more supports to alleviate the cost of it if you do not qualify for assistance.*
- *Help increase the pay for existing daycare providers.*
- *Part-time care or after school programs at school. Less shuffle of the kids.*
- *We need more childcare facilities.*
- *I don't see many opportunities. If anything, I see the cost continuing to rise, and less and less parents sending their children to daycare.*
- *A lot of people will be happy to just have a nice place where kids are going to be safe and have positive interactions.*
- *Not sure.*
- *Very limited. Fill up fast.*
- *An easy opportunity I see is that Prince of Peace remains open for summer months. I think this would be an easy start to increase spots. I would even pay a premium price to keep my child in consistent care there if operating costs deemed it necessary.*
- *It's going to continue to get more expensive because there is such a demand. Child care is not paying workers enough, so nobody wants to work there.*
- *Less struggle to afford things financially because there will be more than 1 person working in the home.*
- *More professional facilities.*
- *More daycare centers that can handle a large number of children.*

The final question asked parents to share any additional comments you have about child care in Clinton and Camanche. Comments received were:

- *More options, more workers, cheaper rates instead of so much of a paycheck going to daycare.*
- *We love the facility we use; they are so nice and flexible and our child loves the staff there.*
- *MercyOne does a fantastic job with our children.*
- *Zion Preschool and Child Care is an amazing facility.*
- *Our current child care is wonderful, but two years ago, we had to find a new place for our children due to lack of transparency, lack of following proper COVID protocols, and leadership issues. Had the previous child care been our only choice, we would have had to make a different decision because we refused to leave our children in that environment.*
- *I have heard that [child care program] is very unorganized.*
- *MercyOne has always been available and a great day care. We are very lucky to have them.*
- *I'm glad I'm only dealing with one kid. In the end, when you are a working parent, your kid ends up wherever there's a spot available.*
- *Business to have more understanding when you have a sick child to care for. Business daycare option.*
- *There needs to be more. They need to be reliable and be able to trust them with your kids of all ages. They also need to be open longer than 5 to 6 hours a day.*
- *My child is currently enrolled at the YWCA Lyons center, and they are amazing. I had such a hard time finding daycare five years ago and I was able to enroll my child. I was very thankful she is enrolled here. They care for her like she's their own child. The staff here is wonderfully supportive. I not sure who will cry more when she ages out of the program.*
- *We like the option to have preschool in the same center where our child normally goes to daycare.*

CHILD CARE GAP ANALYSIS

Calculating the gap in a child care market needs to take into consideration multiple factors, and as solutions to address this gap are considered, it must be kept in mind that not all families will utilize child care, and those that do will have a variety of needs with some children attending full-time while others attend only part-time and therefore may share a space. If there was exactly one space for each child, some spaces would not be utilized, or would be utilized in a manner that would not allow the child care provider to maintain a sustainable business model.

The following summary of the supply and demand provides an estimation of the gap between the number of children likely to use regulated child care and the number of spaces available in programs currently regulated by Iowa Department of Health and Human Services (HHS) in Clinton and Camanche.

As of November 2023, there are 28 HHS regulated child care programs offering a total of 1,314 spaces. Among those 14 are HHS licensed centers and preschools (1,165 licensed spaces), of which 9 offer care year-round, while 5 operate during the school year only. Overall, the licensed centers provide care between the hours of 5:45 am and 6:00 pm, Monday through Friday, with the exception of the YWCA Children's Center which will provide care as late as 12:00 am (midnight) depending on the needs of the enrolled families. There are also 13 registered child development homes and 1 regulated child care home (149 registered spaces). Eleven (11) of the homes offer care between 5:30 am and 5:30 pm, Monday through Friday, while a few of those also offer Saturday care during the same hours. The remaining 4 registered homes provide care 24 hours a day, with 3 operating 7 days per week and 1 operating 6 days per week.

Within the market area, there are 4,408 children ages 0 to 11. Of those, First Children's Finance (FCF) estimates 3,395 have all parents working. If it is assumed these families are represented by the parents that participated in the child care needs survey, then 79% or approximately 2,681 are from families who prefer and would be likely to use an HHS regulated child care setting. According to Iowa HHS, there are currently 1,314 regulated spaces, with 1,094 of those being available on a full-time year-round basis.

The following table shows the number of children likely to use HHS regulated child care versus the number of regulated spaces available, and the number of regulated spaces available year-round. When broken down by age group, calculations show there is a shortage of 217 spaces for infants and toddlers, and 1,278 spaces for school age children. When it comes to preschool age (ages 3 and 4), the calculations show there is a surplus of 128 spaces. If the part-time school year only spaces are not included, the shortage for infants and toddlers grows to 237 spaces,

and for school age it grows to 1,428 spaces, while the surplus for preschool age decreases to 78 spaces.

Table 50: Estimated Child Care Gap in the Market Area

	Children w/All Parents Working	Likely to Use Regulated Care	HHS Listed Spaces	Child Care Gap	Year- Round Spaces	Year- Round Gap
Age 0 to 2	830	655	438	-217	418	-237
Age 3 to 4	501	395	523	+128	473	+78
Age 5 to 11	2,064	1,631	353	-1,278	203	-1,428
Total	3,395	2,681	1,314	-1,367	1,094	-1,587

Overall, the market area has more children living there that are likely to use regulated child care than spaces available. Additionally, some families from outside the area also prefer to use child care in Clinton or Camanche, indicating the number of child care spaces needed may be even greater than this child care gap analysis indicates.

KEY FINDINGS

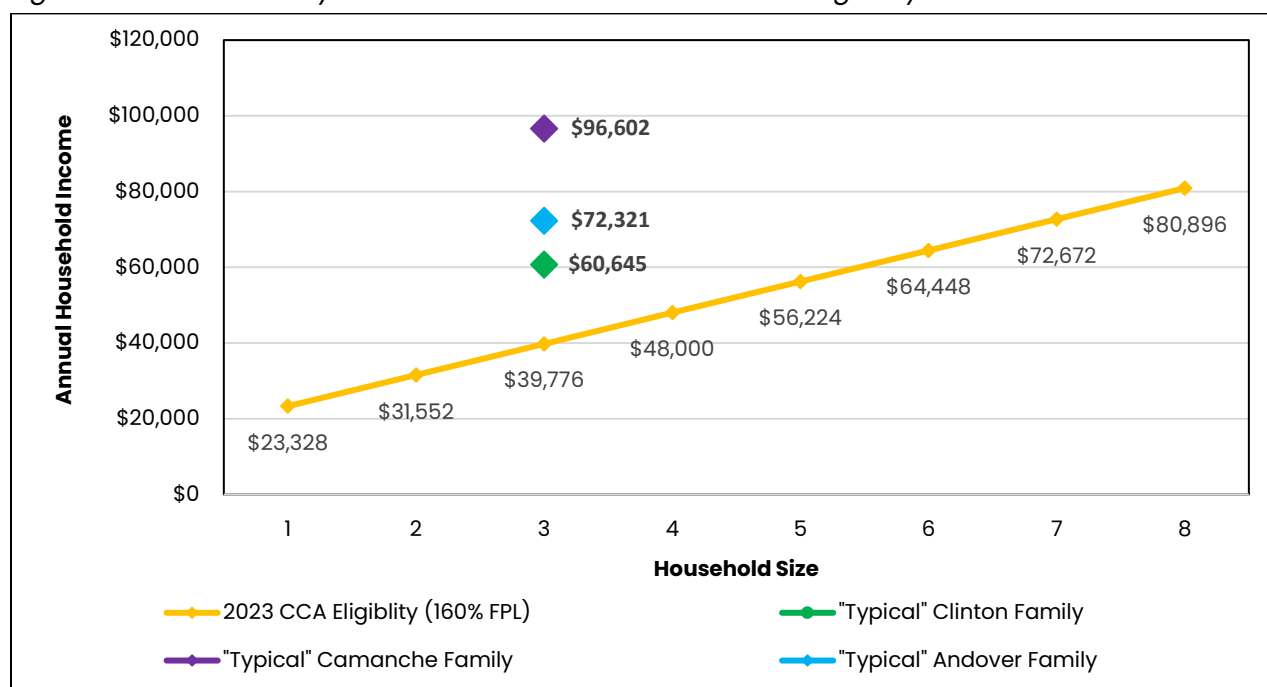
These key findings are based on research and conditions of the current child care market in the Clinton and Camanche area as of November 2023. If the community or the child care environment changes significantly, current findings may be affected.

Finding 1: Median Household Incomes Exceed Child Care Assistance Eligibility Threshold

The median annual income for families with children under the age of 18 ranges is \$60,645 in the Clinton area and \$96,602 in the Camanche area. The median annual income for a family with children that is headed by a married couple is \$72,321 for Andover (this was the only families with children income available for that area). To be initially eligible for the Iowa Child Care Assistance (CCA) program a family's income must not exceed 160% of Federal Poverty Level (FPL), or 200% if they have a child with special needs. According to the poverty threshold that went into effect in January 2023, 160% FPL is equivalent to \$39,776 for a household of 3, and \$48,000 for a household of 4. While many households with children in market area exceed these incomes, it is possible they still struggle to pay child care expenses out of pocket.

The following figure plots the median income of households with children under 18 within the three zip codes using the family size of 3 (rounding the average household sizes). The diagonal line shows 160% FPL based on the household size, while diamonds show the "typical" family for each area based on the average household size and median income for families with children.

Figure 14: Median Family Incomes vs. Child Care Assistance Eligibility Threshold



Finding 2: There is a Significant Difference Between Average Weekly Tuition of Licensed Centers and Registered Homes

When comparing average weekly tuition in a center to a registered home in Clinton County, there is a significant difference between the two. As of November 2023, the difference in average weekly tuition for children ages 0 to 2 and ages 4 to 5 in a licensed center vs. a registered home is approximately \$50, with a center being higher than a registered home. Meanwhile, the difference for age 3 and full-time care for school age children is \$20 to \$30 per week, with center tuition again higher than a registered home. The difference in average weekly tuition for before and after school care is the largest, with centers approximately \$75 per week higher than registered homes. A family using a center could pay between \$1,097 and \$2,736 more per year than a family using a registered home (assuming 50 weeks of tuition at the county average).

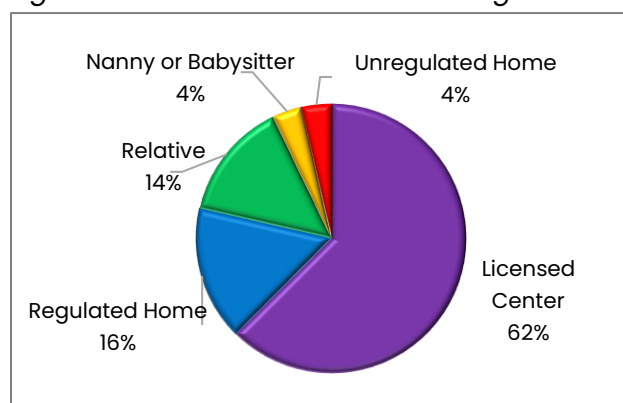
Table 51: Comparison of Average Weekly Tuition in Clinton County

	Licensed Center	Registered Homes	Difference
Infant	\$196.67	\$144.33	\$52.34
Toddler	\$196.67	\$141.95	\$54.72
Two-Year-Old	\$184.38	\$138.86	\$45.52
Three-Year-Old	\$168.47	\$138.86	\$29.61
Four- & Five-Year-Old	\$190.00	\$143.35	\$46.65
School-Age (full time)	\$153.71	\$131.77	\$21.94
Before & After School	\$136.27	\$61.78	\$74.49

Finding 3: Parents Want Year-Round Care in a Licensed Center

Through the child care needs surveys parents were asked several questions about their child care needs and preferences. The most preferred child care arrangement is a licensed child care center, which is preferred by 62%, followed by an HHS registered child development home (16%). Overall, 79% of parents prefer a setting that is regulated by Iowa Department of Health and Human Services (HHS), either a licensed center or a registered home.

Figure 15: Preferred Child Care Setting



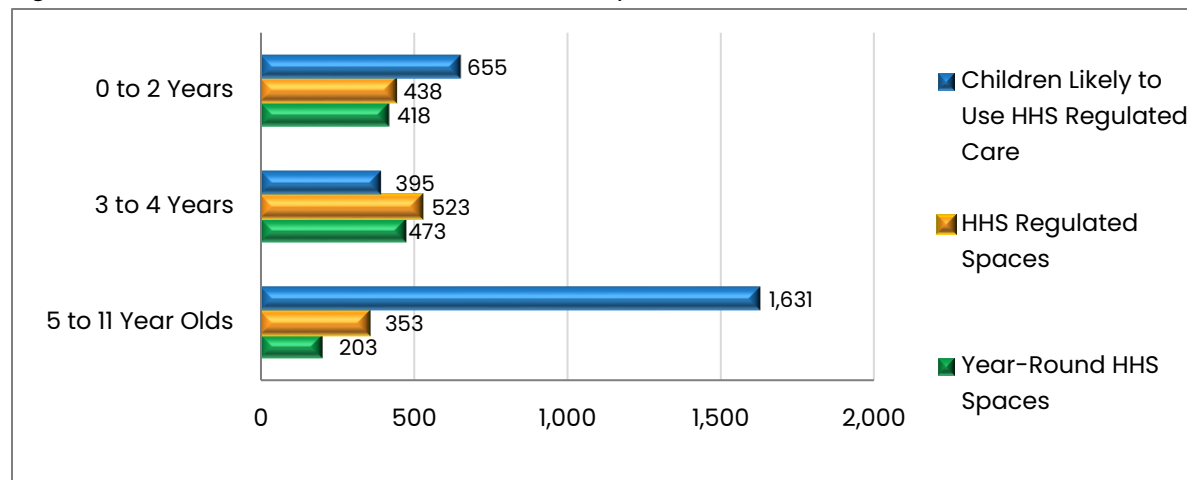
When asked if they were selecting child care today, parents indicated they would prefer to use care Monday through Friday (91% to 96% per day), dropping off their children during the 7:00 am hour (63%) and picking them up during the 4:00 pm hour (36%), followed by the 5:00 pm hour (25%). Separately parents were asked when they prefer to use child care based on the age of their children. A majority of parents (87%) with children ages 0 to 5 but not in kindergarten indicate they prefer year-round care. When it comes to parents with school-age children the majority (54%) still prefer year-round care.

Finding 4: There is a Shortage of Child Care Spaces Among Some Age Groups

There are 4,408 children ages 0 to 11 in the market area. Of those, First Children's Finance (FCF) estimates 3,395 have all parents working. Based on the percentage of families that have all parents working, and parents' preferences of child care settings, First Children's Finance estimates that approximately 2,681 of those children are from families that would likely use HHS regulated child care. According to Iowa HHS, there are currently 1,314 HHS regulated spaces, of which 1,094 are available year-round.

When broken down by age group and only full-time year-round child care spaces are considered (part-time preschool and school year only spaces not included), calculations show the child care gap could be as high as 1,587 spaces: 237 spaces for ages 0 to 2 and of 1,428 spaces for school age children. Despite these gaps, there appears to be a surplus of spaces for ages 3 to 4 (preschool age), with 395 children and 473 year-round spaces.

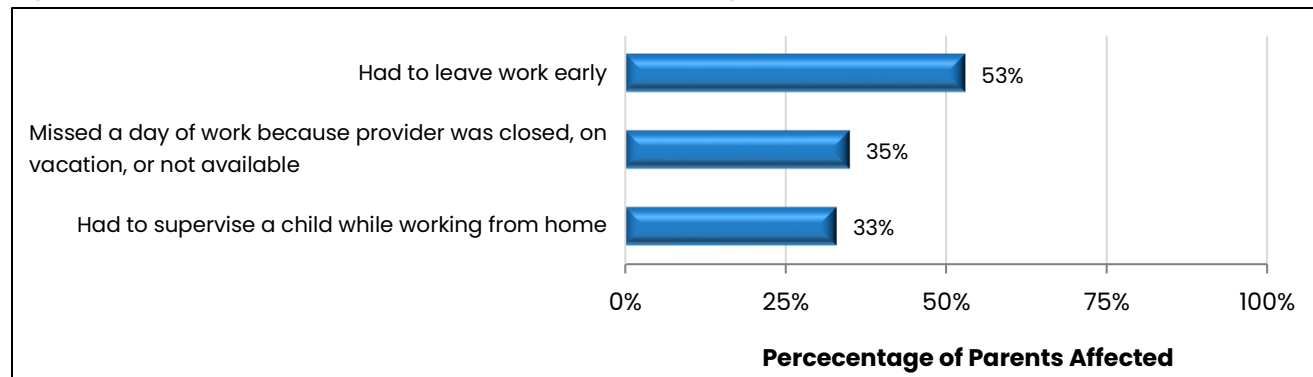
Figure 16: Children Need Care vs. Child Care Spaces



Finding 5: Parents Indicate Child Care Challenges are Affecting their Job

Over the last 12 months, parents have experienced child care challenges that have in turn affected their job. The adverse effects experienced by at least one-quarter of the parents were: had to leave work early (53%), missed a day of work because the provider was closed, on vacation, or not available (35%), and had to supervise a child while working from home (33%).

Figure 17: Most Common Effects of Child Care Challenges Reported by Parents



Separately, 23% of parents indicated that child care challenges are currently limiting their or their spouse's or partner's employment, 14% indicated they or their spouse or partner has declined employment or withdrawn from the workforce in the last 12 months due to child care, and 11% indicated they or their spouse or partner is not working (unemployed) due to child care challenges.

Finding 6: Employers are having Difficulty Hiring Due to Child Care

Through the child care needs survey conducted as part of this study, employers were asked if they had experienced difficulty hiring due to child care options or challenges. Thirty-seven percent (37%) indicated they had, while an additional 26% were unsure. Employers were asked to elaborate by sharing comments, some of the comments received were:

- *We have missed out on the opportunity to hire talented individuals a few times because they cannot find childcare.*
- *People who are relocating seem to have the biggest challenges. They do not know anyone here, so they do not have a network of people to tap into.*
- *Some people do not have daycare in the hours needed for their shift.*
- *I have a single mom...we are allowing her to bring the infant to the office due to child care being so expensive! She could get state assistance, but options are very limited and in home daycare is outrageous.*

Employers were also asked about employee productivity and absenteeism due to child care challenges. Forty-seven percent (47%) of employers indicated they had challenges related to

productivity due to employee's child care challenges, while 42% of employers indicated they had experienced employee absenteeism due to employee's child care challenges. For each question employers were allowed to make additional comments. Some of the comments received were:

- *Employee could not work when child was not in school.*
- *Employees do not always arrive on time because of their children.*
- *Employees may have to adjust schedules to meet needs.*
- *Call offs because of not having daycare.*
- *Missing work to stay home with a sick child.*
- *Employees leave a lot during the day due to no day care available.*

Finding 7: Child Care Centers are having Difficulty Hiring Staff

Through the child care needs survey conducted as part of this study, child care providers were asked multiple questions about their staff. During the previous 12 months, the child care centers had a total of 30 employees depart, either voluntarily or involuntarily. Of those positions, 14 were full-time and 16 part-time. Currently there are 6 vacant positions, 2 full-time and 4 part-time. When asked how hiring staff had been over the past 12 months, 1 center indicated it was somewhat difficult, while the other 2 centers indicated it was very difficult. Related comments received were:

- *Hiring quality staff has been hard. Often times, candidates do not show up for an interview or once hired are not able to fulfill the requirements by DHS (physical, background check, fingerprints, and new hire paperwork to begin employment). The Center takes care of the background checks and fingerprinting costs. Candidates will accept another job offer that pays more.*
- *I get a lot of applications however they do not meet many qualifications or are not a good fit for child care.*
- *People want to make more money.*