ELAC Committee Meeting

May 27, 2020

View the meeting recording here:

https://zoom.us/rec/share/_chZM-yq2kRIRp3x7Fr7VasEJK_eaaa8g3If_aYKnkqNnS1OrWCu2pw1t0MHcSEd
Password: 3L!N$oX!
Virtual Call
Zoom Meeting: https://zoom.us/j/96613087926
Meeting ID: 966 1308 7926
One tap mobile: (312) 626-6799 Passcode: 96613087926#

I. Approve February Meeting Minutes

II. ELAC Annual Report
   i. Approve 2020 Annual Report
   ii. Plan for 2021 Annual Report
   Kim Hodge, Data Workgroup Chair, Shine Early Learning

III. COVID-19 Response and Implications
    Nicole Norvell, FSSA Office of Early Childhood and Out of School Learning

IV. CCDF and OMW Pre-K Changes/ Updates
    Nicole Norvell

V. Public Comment

VI. Adjourn

Next Committee Meeting: August 11th at 1:00pm (Virtual)
INDIANA EARLY LEARNING ADVISORY COMMITTEE

Data Coordination Workgroup

Plans for 2020 and 2021 Annual Reports

Kim Hodge, Workgroup Chair
May 2020
Findings

**Figure 1: What is the trend of Indiana’s population under 6 years?**

<table>
<thead>
<tr>
<th>Year</th>
<th>Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>521K</td>
</tr>
<tr>
<td>2011</td>
<td>517K</td>
</tr>
<tr>
<td>2012</td>
<td>513K</td>
</tr>
<tr>
<td>2013</td>
<td>509K</td>
</tr>
<tr>
<td>2014</td>
<td>506K</td>
</tr>
<tr>
<td>2015</td>
<td>505K</td>
</tr>
<tr>
<td>2016</td>
<td>506K</td>
</tr>
<tr>
<td>2017</td>
<td>505K</td>
</tr>
<tr>
<td>2018</td>
<td>504K</td>
</tr>
</tbody>
</table>

Findings

Indiana Early Care and Education Data

- FSSA Office of Early Childhood and Out-of-School Learning
- Early Learning Indiana
- Indiana Department of Education

113,781

27,000

ECE Enrollment
Findings

Figure 6: What percentage of children who need care are enrolled in a known early care and education program?

35%
Findings

Figure 12: How many programs have participated in Paths to QUALITY™ over the past 5 years?

Figure 14: What percentage of children who need care are enrolled in high-quality early care and education?
Findings

- 29,575 ECE Workforce
- 1,074 School-Based Workforce
- 8,000 Estimated shortage in 10 years
Findings

Infant and a 4-year-old in a center $21,680 annually

Percentage of Annual Income
• 86% for a family in poverty
• 92% for a single mother
• 26% two-parent family
Recommendations

1. Enhance program quality and access
2. Strengthen data quality and coordination
### 2020 Annual Report Timeline

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>TCG share draft narrative with Data Workgroup</td>
<td>Mid-March</td>
</tr>
<tr>
<td>TCG finalize narrative and visuals with Workgroup</td>
<td>April</td>
</tr>
<tr>
<td>Workgroup presents final draft for approval by ELAC</td>
<td>May</td>
</tr>
<tr>
<td>ELAC/ FSSA submit to Governor’s Office and Legislative Committee</td>
<td>June 30</td>
</tr>
<tr>
<td>Implement communications plan when publicly available</td>
<td>July</td>
</tr>
</tbody>
</table>
Interactive Dashboard

2020 ELAC Annual Report Interactive Dashboard

Select Demographic Category
- County

Select Location(s)
- Marion

High Quality

How many early care and education programs are participating in Paths to QUALITY™?

<table>
<thead>
<tr>
<th>Level</th>
<th>High Quality</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level 4</td>
<td>70</td>
<td></td>
</tr>
<tr>
<td>Level 3</td>
<td>177</td>
<td></td>
</tr>
<tr>
<td>Level 2</td>
<td>42</td>
<td></td>
</tr>
<tr>
<td>Level 1</td>
<td>226</td>
<td></td>
</tr>
<tr>
<td>Not Participating</td>
<td>387</td>
<td></td>
</tr>
</tbody>
</table>

What percentage of all known programs are high quality?
- 29%

How many high-quality programs are in Indiana by type?
- Child Care Center: 89
- Family Child Care: 94
- Registered Ministry: 37
- School-Based: 41

How many high-quality programs are in Indiana?

Select a Program Type to Filter the Map

All HQ Programs

Highlight County

Highlight SDA Region

Range of HQ Programs
- No HQ Programs
- Less Than 10
- 10 to 50
- 50 to 99
- 100 to 499
- 500 to 999
- 1,000 to 4,999
- 5,000 to 9,999
- 10,000 to 49,999
- 50,000 to 99,999
- 100,000 or more

How have the number of programs participating in Paths to QUALITY™ changed?

Highlight County

Highlight SDA Region

Range of HQ Programs
- No HQ Programs
- Less Than 10
- 10 to 50
- 50 to 99
- 100 to 499
- 500 to 999
- 1,000 to 4,999
- 5,000 to 9,999
- 10,000 to 49,999
- 50,000 to 99,999
- 100,000 or more

https://public.tableau.com/profile/elac#!/vizhome/2020ELACAnnualReportInteractiveDashboard/InteractiveDashboard
2021 Annual Report

• Shortened Timeline
  – Goal to finalize at November 2020 meeting for next budget sessions
• Focus on COVID-19 response and implications for the industry
• Qualitative / Anecdotal data
2021 Annual Report
Areas of Focus

Young Children & Families
- Demographics of children birth through five and their families

Accessibility
- Early childhood education (ECE) programs
- COVID response impact on programs
- Workforce counts and unemployment

High Quality
- Status of High Quality Rated Programs
- COVID impact

Affordability
- Tuition cost of care (new data from COVID grants)
- Funding and assistance for families

* New area
2021 Annual Report
Data Requests

- Department of Workforce Development (DWD)
- Indiana Department of Education (IDOE)
- FSSA Office of Early Childhood and Out-of-School Learning (OECOSL)
### 2021 Annual Report Timeline

<table>
<thead>
<tr>
<th>Task</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send data requests</td>
<td>Mid June</td>
</tr>
<tr>
<td>Receive all data as of June 30th</td>
<td>July 31</td>
</tr>
<tr>
<td>TCG prepares analysis and draft to share with workgroup</td>
<td>August - September</td>
</tr>
<tr>
<td>TCG finalize narrative and visuals with workgroup</td>
<td>October</td>
</tr>
<tr>
<td>Workgroup presents final draft for approval by ELAC</td>
<td>November 1</td>
</tr>
<tr>
<td>TCG makes any final changes from ELAC</td>
<td>November</td>
</tr>
<tr>
<td>ELAC/ FSSA submit to Governor’s Office and Legislature before the legislative session</td>
<td>Late November</td>
</tr>
</tbody>
</table>
Questions?
Strategic Communications Plan

2020 ELAC Annual Report and Interactive Dashboard

Strategic Communications Plan

5/27/2020

Contacts:

Betsy Delgado, Chairwoman, Indiana Early Learning Advisory Committee
Kim Hodge, Chair, ELAC Data Coordination and System Integration Workgroup
Amanda Lopez, President, Transform Consulting Group

Primary Target Audience(s):

- Governor Eric Holcomb (1)
- Indiana General Assembly Members (150)

Secondary Audiences:

Government Sector

- Aim, formerly Indiana Association of Cities and Towns
- Children’s Justice Act Task Force
- Commission on Improving the Status of Children in Indiana
- FSSA Division of Mental Health and Addiction
- FSSA Secretary
- IDOE Superintendent
- Indiana Department of Child Services
- Indiana Department of Workforce Development
- Indiana Drug Enforcement, Prevention and Treatment Task Force
- Indiana Head Start State Collaboration Office
- Indiana Higher Education Commission / Learn More Indiana
- Indiana Management Performance Hub
- Indiana Office of Community and Rural Affairs
- Indiana State Department of Health
- Lieutenant Governor Suzanne Crouch (1)
- U.S. Representatives (9)
- U.S. Senators (2)
**Early Learning Community**
- Child Care and Development Fund (CCDF) eligibility agencies (5)
- Child Care Resource and Referral agencies (5)
- Early childhood coalitions in Indiana (30+)
- Early Learning Indiana (1)
- Indiana Association for the Education of Young Children, Inc. (INAEYC) (1)
- Indiana Head Start Association (1)
- Indiana Home Visiting Advisory Board
- Members of the Indiana Early Childhood Higher Education Forum
- On My Way Pre-K county lead organizations and partners
- Participants in the 2019 Summit on Economic Development via Early Childhood Coalitions (350+)
- Spark Learning Lab (1)

**P-16 School Sector**
- Indiana Association of School Principals
- Indiana Association of Superintendents
- Indiana Non-Public Education Association (1-400)
- Stand for Children
- Superintendent of Public Instruction, all public-school superintendents (381) and charter schools, Regional Educational Service Centers via the Indiana Department of Education (400+)

**Business and Economic Development Sector**
- Indiana Chamber of Commerce (1)
- Indiana Early Childhood Education Coalition
- Indiana Economic Development Corporation Leadership, Secretary of Commerce Jim Schellinger (1)
- Leaders of Local Economic Development Corporations (92)
- LISC Indianapolis
- Local Chambers of Commerce
- Local Workforce Investment Act (WIA) Councils/ Boards
- Northeast Indiana Regional Partnership
- Prosperity Indiana (formerly IACED)
- Southwest Indiana Business Roundtable for Early Learning

**Philanthropic Sector**
- Indiana Asset Funders Network
- Indiana Philanthropy Alliance
- Indiana United Way (1)
- Lilly Endowment
- Local Community Foundations
- Local United Ways
- Lumina Foundation
- PNC Bank/ Foundation
- Welborn Baptist Foundation

**Nonprofit Sector**
- Indiana Afterschool Network
- Indiana Coalition for Human Services
- Indiana Institute for Working Families
- Indiana Youth Institute
- Marion County Council on Youth (MCCOY)
- Public media stations in Indiana
- Sagamore Institute

**Policy/Research Sector**
- Ball State University Center for Business and Economic Research (CBER)
- Center on Enhancing Early Learning Outcomes (CEELO), NIEER at Rutgers University (6)
- Dr. Michael Conn-Powers at the Indiana Institute on Disability and Community, Indiana University Public Policy Institute
- Indiana Business Research Center
- Indiana University Public Policy Institute
- Professor Sara Schmitt at the Department of Human Development and Family Studies at Purdue University

**Health Sector**
- Help Me Grow, Program Manager Shannon Garrity (1) and/or Organizing Entity (8)
- Indiana Chapter of American Academy of Pediatrics
- Indiana University Med School/ Pediatrics / Riley
- Infancy Onward

**Background:** Brief history of program, event or activity
Each year, Indiana’s Early Learning Advisory Committee (ELAC) conducts a comprehensive needs assessment on critical early learning indicators and presents recommendations to the Governor’s Office and the Indiana Legislative Council on ways to address the identified needs.

This report focuses on the care and education of young children ages 0-5. It highlights both Indiana’s progress and areas where improvement is needed based on the needs assessment completed in the last year. The data presented in this report is compiled from multiple sources and provides a comprehensive overview about the state of young children in Indiana.

ELAC has published the Annual Report as required by statute each year since 2014 and sent hard copies to the governor and Legislative Council.

Rationale: Why is this plan needed?

Information included in the Annual Report and Interactive Dashboard is valuable to several stakeholders for many reasons. Information on the state of early learning supports success in school and in the workforce, so school systems and those interested in economic development have a vested interest in receiving such data. Use of this information can support efforts to grow, attract and retain the talent Indiana employers and communities need to thrive. Philanthropic organizations can use such data to identify needs and measure the impact of their investments in human capital. Legislators and local government leaders can use the data to inform policy and investment decisions.

Given these needs and the monumental effort ELAC and its partner agencies have made to collect and format data in useful ways, it makes sense to share it with as many potentially interested entities as possible. Sharing these reports widely will also help identify ELAC as a reliable source of accurate, comprehensive information on early learning and help direct interested parties to the wealth of resources on the ELAC website. Wide dissemination of this data also will help assure alignment of data used throughout the state for important decision-making that affects the lives of children and the quality of life for all Hoosiers.

Providing such assistance can help ELAC meet all five of its desired strategies, as follows:

- Establish baselines and future needs—Data in the Annual Report and Interactive Dashboard is designed to do just that.
- Provide system development tools – The report and interactive dashboard are system-building tools that stakeholders can use and reference to build local and statewide critical infrastructure.
- Facilitate community partnerships—The data can help communities use evidence-based decision-making, make meaning out of data and communicate it in ways that attract and sustain support for collaborative action.
- Demonstrate community impact—The data can be used to demonstrate progress from year to year at state and county levels.
- Secure resources—Communities and organizations can use the data to identify needs and secure resources.

Goals: List up to 5 high level goals—Describe what you are trying to accomplish overall through the communications plan. Link to ELAC mission and vision when possible.

- Help communities and decision-makers find the data they need to identify needs and gaps and to create baselines.
- Enable communities to apply data-informed decision-making and track progress toward shared outcomes over time for continuous improvement.
- Increase use of the information available on the ELAC website by entities in private, public and nonprofit sectors.
- Increase recognition of ELAC and its partners as reliable resources for information and recommendations about early learning issues based on reliable data and research.

**Objectives:** State the Measurable, specific Behavior changes you want a target Audience to achieve and the Timeframe in which you want to achieve them.

- Increase awareness of Annual Report and Interactive Dashboard to all the entities listed under the Secondary Audiences section of this plan within 30 days of acknowledgement of receipt of the Annual Report by the governor and the Indiana General Assembly — over 1,000 individuals.
- Double the number of views of the Annual Report and Dashboard on the ELAC website within 30 days of publishing it (Compare views of 2019 report/dashboard to 2020 report/dashboard).
- Increase organizations citing and referencing data from the ELAC annual report and county profiles.

**Strategies:** List communications practices, channels, methods, partnerships, etc. that you will use in order to engage your key audiences and accomplish your objectives.

1. ELAC will use standard channels to deliver the Annual Report to the governor and the Indiana General Assembly.
2. Transform Consulting Group will publish the Annual Report and Interactive Dashboard on the ELAC website.
3. Transform Consulting Group will send email messages on behalf of ELAC and signed by the ELAC chair through a contact management system to track open and click rates.
4. ELAC will encourage its members to share the report and dashboard to their individual networks.

**Key Messages:** List up to 3 key messages

1. Share the Executive Summary for a quick overview of the annual report.
2. Share that the data is now interactive and accessible on the ELACIndiana.org website.

**Talking Points:** As this plan comes together, keep a running list of (concise) key talking points and Q & A (below).

**Q:** Whom do we contact if we have questions about the data?
**A:** You can contact the ELAC Data Workgroup Chair, Kim Hodge or Transform Consulting Group. You can submit a question here: [http://www.elacindiana.org/contact-us/](http://www.elacindiana.org/contact-us/).

**Q:** Whom do we contact if we have suggestions for the Annual Report or Interactive Dashboard?
**A:** The ELAC Data Coordination and System Integration Workgroup Chair Kim Hodge.

**Tactics:**

<table>
<thead>
<tr>
<th>Actions</th>
<th>Tactics</th>
<th>Start</th>
<th>Complete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Share</td>
<td>Share the communication plan with ELAC members.</td>
<td>May 2020</td>
<td>May 2020</td>
</tr>
<tr>
<td>Approval</td>
<td>Obtain ELAC approval of the communication plan</td>
<td>May 2020</td>
<td>May 2020</td>
</tr>
<tr>
<td>----------</td>
<td>-----------------------------------------------</td>
<td>----------</td>
<td>----------</td>
</tr>
<tr>
<td>Share</td>
<td>ELAC will deliver the Annual Report to the governor and Legislative Council; notify Transform Consulting to post it to the ELAC website</td>
<td>June 2020</td>
<td>July 2020</td>
</tr>
<tr>
<td>Publish</td>
<td>Transform Consulting Group will publish the Annual Report and Interactive Dashboard on the ELAC website</td>
<td>July 2020</td>
<td>July 2020</td>
</tr>
<tr>
<td>Email</td>
<td>Transform Consulting Group will send the email messages to Secondary Audiences on behalf of ELAC and signed by the ELAC chair or interim chair</td>
<td>July 2020</td>
<td>July 2020</td>
</tr>
<tr>
<td>Review</td>
<td>Transform Consulting Group will evaluate the number of views and downloads of the Annual Report and Interactive Dashboard on the ELAC website</td>
<td>July 2020</td>
<td>Aug. 2020</td>
</tr>
<tr>
<td>Review</td>
<td>The Data workgroup will review TCG’s report on views and downloads and compare results to communication plan goals.</td>
<td>Aug. 2020</td>
<td>Aug. 2020</td>
</tr>
<tr>
<td>Share</td>
<td>The Data Workgroup will review the results of its communication efforts and TCG’s report on views and downloads with the ELAC.</td>
<td>Aug. 2020</td>
<td>Aug. 2020</td>
</tr>
</tbody>
</table>
Child Care Provider Statistics and Thoughts in the Time of COVID-19

May 8, 2020
Data Analytics Overview

The data in this presentation represents child care provider answers to a 58-question survey.

Survey topics included closure status, staffing and building needs, health and safety, financial status, overall outlook, and plans for the future.

The survey was publicized through OECOSL, United Way, Early Learning Indiana, and the After School Network.

The survey was open for one week.

1,113 child care providers statewide responded.
Survey Respondent Demographics

Age Groups Served
Respondents may select multiple age groups

Program Types
Respondents may select multiple program types

Providers by County
Top 25
Status of Programs

% of Providers Open v. Closed

Open, 62%
Closed, 38%

Open 688 Closed 425

Closure Status % By Provider Program Type

<table>
<thead>
<tr>
<th>Program Type</th>
<th>Percentage of Type Open</th>
<th>Percentage of Type Closed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
<td>50%</td>
<td>50%</td>
</tr>
<tr>
<td>Before/After Care..</td>
<td>40%</td>
<td>60%</td>
</tr>
<tr>
<td>Summer Break Camp</td>
<td>30%</td>
<td>70%</td>
</tr>
<tr>
<td>Center</td>
<td>20%</td>
<td>80%</td>
</tr>
<tr>
<td>Ministry</td>
<td>10%</td>
<td>90%</td>
</tr>
<tr>
<td>Other</td>
<td>10%</td>
<td>90%</td>
</tr>
<tr>
<td>Private School</td>
<td>10%</td>
<td>90%</td>
</tr>
<tr>
<td>Public School</td>
<td>10%</td>
<td>90%</td>
</tr>
<tr>
<td>Charter School</td>
<td>10%</td>
<td>90%</td>
</tr>
</tbody>
</table>
Status of Programs

Number of Closed Providers that Plan to Reopen

- Yes 92%
- Yes* 1%
- No 1%

Providers Reopening

The blue line represents the total number of child care providers expected to be open during a given week. The yellow line represents the number of providers expected to reopen during a given week.

*Of the 32 providers that answered that they do NOT plan on reopening, it was determined through their comments that 28 had misunderstood the question and would be reopening. The respondents were mainly schools that plan to reopen when based on school calendars.
Status of Programs

The graph below shows the percentages of each child care provider program type that plan to be open during a given week. **Note:** the percentages in this graph are expressed as a percentage of open programs relative to the total number of programs captured in the survey response data.
Status of Programs

The survey results indicate that child care providers are roughly evenly split in how they will reopen, with 39% planning to reopen in phases and 40% planning to reopen all at once.
Status of Programs

Four providers indicated that they do not plan to reopen. Based on their comments, it is unclear if they misunderstood the question and plan to reopen at a later unknown date.

<table>
<thead>
<tr>
<th>Bartholomew</th>
<th>Marion</th>
<th>LaPorte</th>
<th>Marion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Before/After Care Provider</td>
<td>Private School</td>
<td>Home</td>
<td>Summer Break Camp; Center; Before/After Care Provider</td>
</tr>
<tr>
<td>&quot;School district decision&quot;</td>
<td>&quot;I have a client with coronavirus and for safety until this is not fenced everything will open this situation, apart I have 3 daughters that I do not want them to become infected&quot;</td>
<td>&quot;Unsure of stay at home orders extension of expiration dates and uncertainty of continued protection in working closely and caring for an asymptomatic population.&quot;</td>
<td>&quot;Still planning as of right now&quot;</td>
</tr>
</tbody>
</table>
Child Care Provider Staffing Levels

Providers have largely not lost staff and have enough staff to maintain operations.

<table>
<thead>
<tr>
<th>% of Providers That Have Lost Staff By Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permanently: 5%</td>
</tr>
<tr>
<td>Temporarily: 6%</td>
</tr>
<tr>
<td>Both: 65%</td>
</tr>
<tr>
<td>None: 24%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Provider has Adequate Staffing to Operate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes: 88%</td>
</tr>
<tr>
<td>No: 4%</td>
</tr>
<tr>
<td>Not Yet Determined: 9%</td>
</tr>
</tbody>
</table>

What actions are you taking to retain staff?

- Continuing to Pay Staff
- Training/Professional Development
- Virtual Work Opportunities
- Hazard Pay
- Bonuses

65% have not lost staff  88% have enough staff
Child Care Provider Staffing Levels

Most of the providers that indicated a lack of staff are Before/After Care Programs and Child Care Homes. Summer Break Camps also need more staff.

<table>
<thead>
<tr>
<th>Types of Providers</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other</td>
<td>10%</td>
</tr>
<tr>
<td>Before/After Center</td>
<td>44%</td>
</tr>
<tr>
<td>Charter School</td>
<td>0%</td>
</tr>
<tr>
<td>Private School</td>
<td>8%</td>
</tr>
<tr>
<td>Public School</td>
<td>3%</td>
</tr>
<tr>
<td>Ministry</td>
<td>18%</td>
</tr>
<tr>
<td>Home</td>
<td>51%</td>
</tr>
<tr>
<td>Center</td>
<td>23%</td>
</tr>
<tr>
<td>Summer Break Camps</td>
<td>31%</td>
</tr>
</tbody>
</table>

**What actions are providers taking to hire (If applicable) and how are they advertising open positions?**

- Social Media (Facebook)
- Job Boards (Indeed.com)
- Word of Mouth

Many are not hiring
Child Care Provider Staffing Levels

19% of providers furloughed 4,515 staff. 3,350 staff, or 74%, of furloughed staff are expected to return to their child care jobs.

% of Open Providers that have Furloughed Staff

- Yes, 19%
- No, 81%

Return of Furloughed Staff Vs Total Furloughs

- Furloughed Staff: 4,515
- Returning Staff: 3,350
- Lost Staff: 1,165
Removal of Children from Child Care

68% of providers said one or more families removed their children from child care. When asked why, providers largely cited family job loss, parent working from home, and fear of COVID-19.

Have Families Removed Children from your Care Since March 2020?

- Yes, 68%
- No, 32%

Why have families removed their children?

- Job Loss: 25%
- Parent is working from home: 36%
- Fear of COVID-19: 31%
- Other: 7%

What is the most common reason than families remove children from care?

- Job Loss
- Parent is working from home
- Fear of COVID-19
- Other
Child Care Provider Health & Safety

% of Providers that Indicated Adequate Access to Supplies

- Hand Sanitizer: 49%
- Masks: 37%
- Cleaning Supplies: 71%
- Food: 84%
- Access to None: 11%

Providers Planning on Implementing Additional Safety Measures

- Yes: 88%
- No: 2%
- Undecided: 10%
Child Care Provider Health & Safety

Of the providers who have or will implement additional health and safety measures, most have focused on washing/sanitization processes and modified child drop off and pick up procedures.

Types of Additional Health & Safety Measures Providers Have or Will Implement

- Modified hand washing and sanitization procedures: 88%
- Modified drop off and pick up procedures: 84%
- Additional requirements to wash bedding and other textiles: 74%
- Small groups for all ages: 47%
- Restrictions on staff traveling throughout the building or on the rooms that they can enter while children are present: 43%
- Other: 22%
Child Care Provider Health & Safety

For providers who indicated that they would implement "small groups for all ages", these are the group sizes indicated:

<table>
<thead>
<tr>
<th>Group Size Mean</th>
<th>Group Size Mode</th>
</tr>
</thead>
<tbody>
<tr>
<td>8</td>
<td>10</td>
</tr>
</tbody>
</table>

Providers’ primary concerns surrounding smaller group sizes are increased staffing requirements, lack of adequate space, and financial impact of serving fewer children.
Child Care Provider Health & Safety

40% Of providers indicated that operating in a school would assist them in serving more children

46% Of providers would need more building space to implement small groups or social distancing

<table>
<thead>
<tr>
<th>Additional Space Needed for Smaller Groups</th>
<th>% of type that would need more space</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other</td>
<td>58%</td>
</tr>
<tr>
<td>Center</td>
<td>56%</td>
</tr>
<tr>
<td>Summer Break Camp</td>
<td>56%</td>
</tr>
<tr>
<td>Public School</td>
<td>51%</td>
</tr>
<tr>
<td>Before/After Care Provider</td>
<td>50%</td>
</tr>
<tr>
<td>Ministry</td>
<td>45%</td>
</tr>
<tr>
<td>Home</td>
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<tr>
<td>Private School</td>
<td>36%</td>
</tr>
<tr>
<td>Charter School</td>
<td>17%</td>
</tr>
</tbody>
</table>
"Do you have additional marketing or outreach plans to inform families of the additional safety measures you are taking to make parents feel comfortable about having their child attend child care programming?"

The majority of providers indicated that they would educate their employees through staff meetings, professional development opportunities, and trainings.

"How do you plan to educate staff about any additional health and safety measures you have or will put in place?"
47% of providers indicated that they are taking steps to address the mental health needs of their child care families and staff.
Child Care Provider Curriculum Plans

61% of providers plan to offer in-person programming. 51% of providers will focus on social emotional learning.

Program Delivery

- In-Person Program: 61%
- Blend of In-Person and Virtual: 36%
- Virtual Program: 15%
- Other: 4%
- None or N/A: 2%

Curriculum Focus

Respondents can choose multiple answers

- Other: 20%
- Social Emotional Learning: 76%
- Summer Learning Loss: 53%
Providers Operating in Schools

10% of providers who responded to the survey operate in a school

Of those, **45%** do not have confirmation that the school building they were planning to use will be open

Of those who do not have confirmation, **82%** do not have a backup location in the event that the school building is not available.

Most providers can ramp up operations quickly once they receive confirmation that their school building will open.
Child Care Provider Barriers

"What do you need to do in the next **two weeks** to keep your business open or to ensure that you can reopen?"

- Financial Assistance
- Sufficient Enrollment
- Supplies (PPE)

"What do you need to do in the next **month** to keep your business open or to ensure that you can reopen?"

- Financial Assistance
- Sufficient Enrollment
- Supplies (PPE)
- Staff Retention

60% of providers **expect a long-term impact** on their business. The most common concern throughout is **reduced enrollment**.

"What is your **biggest barrier** to continuing operations or reopening?"

- Supplies (Cleaning, PPE)
- Financial Hardship
- Enrollment
- Staffing

"What is your **biggest concern**?"

- Supplies (Cleaning, PPE)
- Reduced Enrollment
- Financial Hardship
- Infection/Spread
- Staffing
Child Care Provider Finances

% of Providers that Plan on Increasing Fees

- Yes: 7%
- Undecided: 31%
- No: 62%

% of Total Respondent Pool Raising Rates

- 0-25%
- 26-50%
- 51-75%
- 76-100%
- More than 100%

- Infants: 3.6%
- Toddlers: 4.1%
- 3/4/5s: 5.0%
- School Age Other (K-12): 3.0%
Child Care Provider Finances

Rate Increase by Age Category

- **Infants**: 9.1% (51.9% increase)
- **Toddlers**: 10.4% (59.7% increase)
- **3/4/5s**: 15.6% (72.7% increase)
- **School Age Other (K-12)**: 11.7% (42.9% increase)

Legend:
- 0-25%
- 26-50%
- 51-75%
- 76-100%
- More than 100%
77% Of Providers know how many children must attend their program in order for them to break even.

Of those providers that know their break-even points, most reported attendance requirements at or above 80% capacity in order to meet operating expenses.

14% Of those that did NOT know their B/E point indicated that they DID need help calculating it. The majority of these were Home providers.
Child Care Provider Financial Assistance

86% of providers did not receive assistance through the Paycheck Protection Program

68% received a temporary assistance grant from OECOSL

"Have you taken any basic business training through Indiana Learnings Paths or as part of the Aim for Excellence credential program?"

28% Yes

72% No
Child Care Provider Mindset

“We need these funds as childcare providers to get back on our feet and build ourselves back up. Some of us, like myself, have been in this field for over 10 years (13 years for me) and have owned our own daycares for a long time and would be devastated to lose everything we worked so hard for. Childcare providers are some of the hardest working individuals. Even while my doors have been closed I've been working in my daycares every single day full time days, plus doing online learning with my daycare children, plus online lessons, creating learning packets, plus being a full time teacher to my 3 school age children who are out for the rest of the year and having my full time 2 year old son as well. We never stop working, we just want help to stay on our feet and get back to where we were before all of this happened. A lot of families are scared, a lot are out of work. Please help providers, because I think this time has really shown the world how important providers are.”

“The grant has helped us tremendously, but when we do open I’m worried about buying food in bulk, if the cleaning supplies will be available, and my families that have left will I fill those spots or lose income and be forced to close.”

“The grant has been a true help with the sudden and immediate loss of income. Without it I would have had to close. The clients I currently have coming are all essential workers that need daycare for their children so I haven’t had to let them down. To be able to keep receiving this kind of grant would be extremely helpful for the next few weeks until parents are back to work.”
Thank you

Kate Shelby, J.D.
765.586.0730
kshelby@ksmconsulting.com
Backup
## School Building Confirmation Needs

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<tr>
<th>County</th>
<th>School-Based Providers</th>
<th>Does not have confirmed Access</th>
<th>% Without Confirmed Access</th>
<th>Providers with a Backup Location</th>
<th>% of Providers without Confirmed Access OR a Backup Location</th>
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Child Care Provider Rate Increases

% of Type Raising Rates - Summer Break Camp

% of Type Raising Rates - Center
Child Care Provider Rate Increases

% of Type Raising Rates - Home

% of Type Raising Rates - Ministry

- Infants
- Toddlers
- 3/4/5s
- School Age Other (K-12)
Child Care Provider Rate Increases

Zero charter schools plan to increase rates.
Child Care Provider Rate Increases

% of Type Raising Rates
Before/After Care Provider

% of Type Raising Rates - Other

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