



FIRST CHILDREN'S FINANCE

Building stronger child care businesses

**Fort Dodge
Child Care Market Analysis**

Prepared by First Children's Finance
November 2016

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Introduction

In 2016 Linking Families and Communities Early Childhood Iowa commissioned this analysis to better understand the child care market in Fort Dodge. The need for such an analysis is a result of residents and employers reporting to the agency that there are not enough quality child care spaces in Fort Dodge to meet demand. The goal of this analysis is to provide Linking Families and Communities, its partners, and the community, with an analysis of the current supply of child care in Fort Dodge. This data can be used for future planning purposes.

This collection of data and analysis has been conducted by First Children's Finance, a national nonprofit organization that believes access to quality early care and education is essential for all communities, and that early care and education is the foundation of individual success and the engine of regional economic growth. First Children's Finance assists local, state and regional organizations, colleges, nonprofit organizations, and others by providing consulting and technical assistance including financial and market analysis, feasibility studies, financial modeling, and business planning. For more information please contact Heidi Schlueter, Regional Director, at Heidi@FirstChildrensFinance.org.

The data in this report has been collected from the US Census Bureau, Iowa Workforce Development, Iowa Department of Human Services, Iowa Child Care Resource & Referral, the City of Fort Dodge, and an original survey facilitated by First Children's Finance.

NOTE: 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 decisions, but no warranty as to completeness or accuracy is implied.

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Executive Summary

Fort Dodge, Iowa is the county seat and home to a majority of Webster County's residents as well as several large employers. As a regional hub for both living and working Fort Dodge needs to have an adequate supply of child care available. For working parents, choosing child care may be one of the most critical decisions they can make as the child care environment has lasting effects on the child. Getting *any* care in Fort Dodge is a challenge; options for *quality* child care that meet the needs and preferences of families is even more challenging.

Iowa Child Care Resource & Referral data shows that the supply of child care in Fort Dodge has been in decline for the last five years. Since 2011 the community has lost 111 providers/programs and 530 child care spaces. Today, there are 1,601 child care spaces plus another 344 preschool spaces. There are only 826 spaces for young children (ages 0 through five) that offer year-round child care. Of the 3,934 children ages 0 to 12 living in Fort Dodge it is estimated 3,239 need some form of child care while their parents work. With only 1,945 spaces there is a potential shortage of 1,294 spaces, which increases to 1,638 if preschool spaces are removed.

Parents participating in a child care needs survey completed as a part of this project confirmed this shortage. When asked if they had difficulty finding child care, 60% indicated they had. The most common reasons cited was no openings within quality settings, no one available to take more infants, and difficulty finding providers that could accommodate their work schedule.

First Children's Finance's Key Findings are:

- Fort Dodge has experienced an overall population decline including a decline in the number of children ages 0-9, but at the same time there has been an increase in the number of adults age 25-34 prime child-bearing years.
- There are approximately 11,915 adults over the age of 16 living in Fort Dodge that are in the labor force. In addition Fort Dodge is a regional hub for employment and pulls employees from a multi-county area. The total potential labor force of the area is 137,219. Presumably some of these workers will need some form of child care while they are working.
- Of families living in Fort Dodge that have children under the age of 6, 86% have all parents working outside of the home, indicating most families need some form of child care.
- Most families' annual household income exceeds the eligibility limit for the Child Care Assistance program.
- Fort Dodge has a declining supply of child care spaces, losing 111 between 2011 and 2016.
- There are an estimated 3,239 children ages 0 to 12 living in Fort Dodge that need some form of child care while their parents are working, but only 1,601 year-round child care spaces.
- Sixty percent of parents indicated they had had difficulty finding child care, especially care for infants. The number one difficulty named was simply no open spaces within the program or environment the parent preferred.
- Half of the employers that completed the child care needs survey indicated that their company had experienced employee absenteeism due to child care issues; while 18% indicated they had had problems hiring new employees due to child care issues.

The community of Fort Dodge would benefit from more child care spaces. Additional child care spaces that are year-round and focused on children ages 0 through 5 with some spaces for school age care will best fill the needs of the community. Providing care from 6:00 a.m. to 6:00 p.m. with a limited

number of spots available from 5:00 a.m. to 8:00 p.m. will best meet the needs of working families. Adding these spaces within licensed child care centers or registered child development homes that are in good standing with the Iowa Department of Human Services, using an evidence-based curriculum, and participating in other initiatives like the Iowa Quality Rating System or Child Net will help assure quality.

Opening a new licensed center would be one way for the community to gain several new spaces at once. The demand is high enough that even with a new center there would still be opportunities for new registered child development homes and for existing centers and registered child development homes to expand their services.

Child Care Market Research

Fort Dodge is located along US Highway 20, in Webster County, Iowa. It is the county seat and is home to a majority of county's residents as well as several large employers. As a regional hub for both living and working, it is estimated that the majority of families that utilize child care services within Fort Dodge either live or are employed within the city limits of Fort Dodge. Data presented in this report reflects the city limits of Fort Dodge only, unless otherwise noted.

Population

The most recent US Census Bureau estimates show the population of Fort Dodge as declining, including the total population and children under the age of 9. At the same time, they estimate an increase among adults ages 25 to 34, presumably child bearing years.

The current population of Fort Dodge is estimated to be 24,846. The community hit a high in 1970 with 31,263 residents and has been slowly declining since. Like most communities in Iowa the biggest decrease came during the 1980's. Since 2000, the community has continued to experience a net population loss, but at a much slower pace. The Fort Dodge Re-Envision 2030 comprehensive plan states that the population is expected to continue declining and reach 24,611 by the 2020 Census.

The US Census Bureau's 2014 estimates show that from 2000 to 2014 there was a net increase of 582 residents age 18 and over. The largest group of adults in the community includes those age 65 and over (16.6%), followed by those age 25 to 34 years old (13.1%). The cohort age 25 to 34 has actually increased since 2000 to 3,261 residents. This group of adults is the group most likely to be having children.

As of 2014 the five-year average (2010-2014) of women ages 15 to 50 living in Fort Dodge was 5,506. During that same time, women ages 15 to 50 averaged 298 births in a 12 month period. Among those that gave birth 208 (70%) were in the labor force, 187 were below 200% of poverty, and 69 received some sort of public assistance.

In 2000 there were 1,716 children under the age of 5, by 2010 that number had fallen to 1,454. During that same time the number of children ages 5 to 9 also declines from 1,728 children to 1,216. These numbers do not necessarily indicate that families are moving out of Fort Dodge, it may indicate there have been fewer births in the community, as a child that was age 0-4 in 2000 would be over the age of 10 by 2014 and no longer reflected in these numbers.

Table 1: Population Ages 0 to 9

	2000	2010	2014
Under Five	1,716	1,542	1,454
Five to Nine	1,728	1,599	1,216
<i>Total ages 0-9</i>	3,444	3,141	2,670

Despite the loss of population, data shows that there is still a shortage of child care spaces. In addition, improving quality of life by adding amenities such as more child care spaces may help to increase population.

Local Industries and Labor Force

A Laborshed is the area from which an employment center draws its commuting workers. Workers with children will also seek child care within the same geography. It is important for child care providers to be aware of local industries to be able to serve their employees, and as an employer child care and preschool programs need to be able to be competitive with wages and benefits.

To determine the boundaries of a laborshed local employers supply the zip codes of each of their employees. The Fort Dodge and Webster County laborshed goes as far north as Algona, as far east as Iowa Falls, as far west as Storm Lake, and as far south as Ogden. According to a 2015 Laborshed Analysis by Iowa Workforce Development the total potential labor force within the laborshed is 137,219.

Most residents of Fort Dodge that are in the labor force are working within Fort Dodge. There are 20,161 adults over the age of 16 living in Fort Dodge; of those 11,915 (59%) are in the labor force. It is estimated only 6.5% or approximately 646 residents out-commute to other communities.

Top industries for employment in the laborshed are Wholesale & Retail Trade (16.8%), followed by Healthcare & Social Services (13.3%), and Education (12.5%). Leading Employers include UnityPoint/Trinity Regional Medical Center, Iowa Central Community College, Boehringer Ingelheim and the Fort Dodge Community Schools.

Wages within the area vary by industry. Median hourly wages range from \$9.25/hour for Wholesale and Retail Trade to \$24.00 for Public Administration and Government. The Laborshed Analysis also indicates that \$9.00/hour is the median wage those currently unemployed would be willing to accept. It would take a minimum of \$9.93/hour to attract 66% of applicants and \$10.00/hour to attract 75% of applicants.

Table 2: Employment by Industry

	Estimated # Employed	Industry % Employed	Median Wages/Hr.
Wholesale & Retail Trade	17,082	16.8%	\$9.25
Healthcare & Social Services	13,523	13.3%	\$13.75
Education	12,710	12.5%	\$12.40
Agriculture, Forestry & Mining	9,558	9.4%	\$17.38
Transportation, Communication & Utilities	9,151	9.0%	\$20.50
Public Administration & Government	8,338	8.2%	\$24.00
Manufacturing	7,626	7.5%	\$18.00
Finance, Insurance & Real Estate	6,406	6.3%	\$12.13
Construction	6,406	6.3%	\$18.00
Personal Services	5,186	5.1%	\$13.00
Professional Services	4,779	4.7%	\$12.00
Entertainment & Recreation	914	0.9%	-----

Working Families

Children in the Ft. Dodge area need quality care because their parents are working outside of the home. According to the US Census bureau, 86% of families living in Fort Dodge that have children under the age of six have all parents are working, and 80% of families in Fort Dodge that have children ages 6-17 have all parents working. That means if there are two parents living in the home

both work, or if the child lives with a single parent that parent is working. The state averages are 75% and 80% respectively.

The median income¹ for all households in Fort Dodge in 2014 was \$38,380; while the median income of families was \$51,035. Out of all families, 13.5% (approximately 739) are below the poverty line, and 45.5% (approximately 332) of those have children under the age of five.

According to the US Census Bureau in 2014 there were 10,279 households in Fort Dodge. The average size of all households is 2.21 persons while the average family size is 2.89 persons. Just over half of all households are family households (5,850) and just under half of those family households have children under the age of 18 (2,588).

Table 3: Household Types, 2014

	Total	Percent
Total Households in Fort Dodge	10,279	100%
Average household size	2.21	
Median household income	\$38,380	
Average family size	2.89	
Median family income	\$51,035	
Family households	5,850	56.9%
Family households with children under 18 years	2,588	25.2%
Married couple family	4,063	39.5%
With own children under 18 years	1,425	13.9%
Male householder, no wife	452	4.4%
With own children under 18 years	277	2.7%
Female householder, no husband	1,335	13.0%
With own children under 18 years	886	8.6%
Nonfamily households	4,425	43.1%
Householder living alone	3,786	36.8%
65 years and over	1,481	14.4%

Local Child Care Supply

Types of Care Available

There are several forms of child care available to meet each family’s varying needs and preferences.

- Licensed Child Care Centers/Preschools
- Head Start/Early Head Start
- School-Based Programs
 - School-Age Care
 - Statewide Voluntary Preschool Program for 4-year-olds
- Registered Child Development Homes

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. Mean income (average) is the amount obtained by dividing the total aggregate income of a group by the number of units in that group.

- Non-Registered Child Care Homes
- In-home Nanny or Au Pare
- Family, Friend or Neighbor

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

In Iowa the Department of Human Services oversees programs that fall into three categories—Non-Registered Homes, Registered Child Development Homes and Licensed Centers. The amount of oversight varies by category.

Non-Registered Child Care Homes

These homes can only care for a maximum of 5 children at any given time. These homes are not required to register but have the option to do so. These homes are not subject to inspection unless they chose to offer Child Care Assistance.

Registered Child Development Homes

These homes can provide care for up to 8, 12 or 16 children at a time depending on their registration level. Registration levels A, B, or C are based on the providers experience and if there are any assistants or co-providers present. Registered homes are inspected by the Department of Human Services and can participate in Child Net and the Iowa Quality Rating System (QRS), both voluntary quality measures.

Licensed Child Care Centers

Licensed centers can care for larger groups of children and includes child care centers (including programs operated by school districts), Head Start programs, and preschools. In a licensed center children are separated by age groups and a specific staff to child ratio is followed. All centers are required to have an Iowa DHS and a fire inspection prior to opening and again every two years when they renew their license. Centers can participate in the voluntary Iowa quality Rating System (QRS).

Current Child Care Supply

Since 2011, the total number of child care providers and child care spaces in Webster County has decreased. According to data compiled by Iowa Child Care Resource & Referral as of July 2016, there were 94 child care programs with 2,111 spaces in Webster County.

Over the last five years there has been a net loss in the total number of child care programs and spaces in Webster County. Most of the loss has been among non-registered child care homes, while there has been an increase of total spaces within licensed centers.

Table 4: Total Programs and Spaces in Webster County, 2011-2016

	2011	2012	2013	2014	2015	2016	Net
Total Programs	205	146	164	124	113	94	-111
Centers	23	20	18	19	18	17	-6
Registered Homes	70	61	65	54	55	42	-28
Non-Registered Homes	112	65	81	51	40	35	-77
Total Spaces	2,641	2,190	2,589	2,347	2,293	2,111	-530
Centers	1,317	1,193	1,480	1,496	1,481	1,468	+151
Registered Homes	764	672	704	596	612	468	-296
Non-Registered Homes	560	325	405	255	200	175	-385

Meanwhile the Iowa Department of Human Services shows there are 72 child care centers, registered child development homes and non-registered child care homes with a Fort Dodge address. These providers offer a variety of services including child care, preschool, before and after school care, and programs for school age children. Collectively these programs offer 1,821 spaces, as follows:

- Non-Registered Child Care Homes - There are 15 non-registered child care homes that can offer 75 spaces in Fort Dodge. All 15 providers accept Child Care Assistance.
- Registered Child Development Homes- There are 43 registered child development homes in Fort Dodge. These providers are collectively registered for 500 spaces. Out of these providers, 42 accept Child Care Assistance.
- Licensed Child Care Centers- There are 13 licensed child care centers in Fort Dodge that collectively offer 1,246 spaces. Out of these providers, 6 accept Child Care Assistance.

Table 5: DHS Licensed Centers and Preschools in Fort Dodge

	DHS License Capacity	Hours of Operation	Year-Round Child Care	Preschool	Infant, Toddler & Two-Year Old Child Care	Three- to Five-Year Old Child Care	School Age Care	Statewide Preschool Prog.	Child Care Assistance	Quality Rating System Level
AFES Youth Center/United for Fun	281	7:30 AM- 6:00 PM	•				•		•	2
Child Care Discovery Center	240	5:30 AM- 6:00 PM	•	•	•	•	•	•	•	
Community Christian Preschool	30	8:15 AM- 3:00 PM		•				•		4
Community Early Childhood Center	151	5:30 AM- 6:00 PM	•	•	•	•	•		•	4
Dodger Academy	50	3:20- 5:30 PM					•		•	
Dodger Preschool	20	8:00 - 11:00 AM or 12:00-3:20 PM		•				•		5
Fort Dodge Head Start	128	9:15 AM- 1:30 PM		•				•		4
KidZone Christian Daycare Center & Preschool	93	6:30 AM- 6:30 PM	•	•	•	•	•		•	4
Little Lambs Preschool	19	9:00 - 11:30 AM		•				•		4
Prince of Peace Preschool	23	9:00 AM- 3:00 PM		•				•		4
St. Edmond After School Program	100	3:20- 5:40 PM					•			
St. Paul Lutheran Preschool	21	8:30-11:00 AM or 12:00-3:00 PM		•			•			3
Tracey's Tots Daycare	90	5:30 AM- 6:00 PM	•	•	•	•	•		•	2

In Fort Dodge 86% of families with children under the age of 6 have all parents working and 80% of families with children ages 6 to 17 have all parents working. It is assumed that while those parents are working their children will need some form of care. According to the 2010 Census, there were 3,934 children ages 0 to 12 living in Fort Dodge. If 86% of the young children and 80% of school age children have all parents working, approximately 3,239 children need some form of care.

Today there are 1,821 child care spaces within DHS licensed centers, registered and non-registered home in Fort Dodge. Of those, 220 spaces are part-time preschool that is only offered during the school year.

Current Preschool Supply

School districts that have been approved to participate in the Iowa Statewide Voluntary Preschool Program (SWVPP) receive funding to offer 10 hours of preschool per week during the school year for four-year-olds. Districts may provide the preschool directly or contract with a community partner to provide preschool on their behalf.

When the school district offers the SWVPP directly they are exempt from Iowa DHS licensing and are instead overseen by the Iowa Department of Education. According to certified enrollment numbers reported to the Iowa Department of Education, the Fort Dodge CSD directly provided preschool for 104 students enrolled at the Riverside Early Learning Center during the 2015-2016 school year.

The community partners that have contracted with the school district to offer SWVPP are:

- Childcare Discovery Center
- Community Christian Preschool
- Dodger Preschool
- Little Lambs Preschool
- Prince of Peace Preschool
- St. Edmond Catholic School

With the exception of St. Edmond Catholic School, all of the SWVPP partners must be licensed by Iowa DHS. Because St. Edmond is a private school district they are exempt from DHS licensing. St. Edmond offers one morning session and one afternoon session, based on the Iowa Department of Education's staff to child ratio requirement of 1:20, it is assumed their capacity is equal to 20 spaces.

In addition to SWVPP, Head Start offers preschool for three- and four-year-olds during the school year. The remaining centers that offer preschool outside of the SWVPP also provide child care allowing parents the option of a "one stop shop".

Total Child Care and Preschool Spaces

There is a total of 1,945 spaces available for the 3,239 children that could potentially need care, this means there is shortage of 1,294 spaces. However, when part-time, school year only preschool spaces, which may still leave parents trying to find child care, are subtracted the total number of available spaces drops to 1,601 increasing the potential shortage to 1,638 spaces.

Table 6: Child Care and Preschool Spaces in Fort Dodge

	Total Children ²	% All Parents Work	Children Needing Care	Total Spaces ³	Total Surplus/Deficit	Part-Time Preschool Spaces	Child Care Only Deficit
Infant/Toddler	628	86%	540	222	-318	N/A	-318
Two-Year-Old	309	86%	265	234	-31	N/A	-31
Three to Four-Year-Old	607	86%	522	714	+192	344	-152
School-Age (5 to 12 Yrs.)	2,390	80%	1,912	775	-1,137	N/A	-1,137
Total	3,934		3,239	1,945	-1,294	344	-1,638

Price Point

According to Iowa Child Care Resource & Referral the average weekly rates in a licensed center in Webster County range from \$106.67 to \$136.67 per week for full-time care and \$53.34 per week for part-time before and after school, while the average weekly rates for registered child development homes range from \$115.45 to \$119.64 for full-time care and \$64.40 for part-time before and after school care.

With so many adults in the labor force that commute to Fort Dodge from other areas, the rates of centers in neighboring communities and counties must also be taken into consideration. The center rates in Webster County are in line with the rates in the neighboring counties of Calhoun and Green, lower than the rates in Boone and Pocahontas Counties, and more than the rates in Hamilton County. Meanwhile the registered home rates are in line with Greene, Humboldt and Wright Counties, lower than Boone, Calhoun and Hamilton Counties, and significantly more than Pocahontas County.

Table 7: Average Weekly Tuition Rates of Licensed Centers in Webster County

	2011	2012	2013	2014	2015	2016
Infant (0 to 12 months)	\$120.35	\$117.60	\$121.93	\$127.75	\$130.00	\$136.67
Toddler (13 to 23 months)	\$115.35	\$117.60	\$121.83	\$125.25	\$130.00	\$130.00
Two Year Olds	\$100.20	\$115.85	\$111.83	\$122.75	\$130.00	\$126.67
Three Year Olds	\$100.20	\$112.59	\$105.33	\$115.50	\$130.00	\$126.67
Four and Five Year Olds	\$100.20	\$112.59	\$103.67	\$113.00	\$130.00	\$126.67
Before and After School	\$47.70	\$58.13	\$46.00	\$56.88	\$50.00	\$53.34
Full time School-Age	\$100.20	\$108.42	\$95.83	\$113.75	\$130.00	\$106.67

² U.S. Census Bureau 2010 Census

³ Includes DHS licensed centers and preschools, exempt preschools, registered child development homes and non-registered child care homes. Total spaces within homes were divided evenly among all age groups.

Table 8: Average Weekly Tuition Rates of Centers in Surrounding Counties⁴ (2016)

	Boone	Calhoun	Greene	Hamilton	Humboldt	Pocahontas	Wright
Infant	\$165.00	\$132.50	\$135.00	\$110.00	N/A	\$155.00	N/A
Toddler	\$165.00	\$132.50	\$135.00	\$110.00	N/A	\$155.00	N/A
Two Year Old	\$155.00	\$122.50	\$125.00	\$110.00	N/A	\$130.00	N/A
Three Year Old	\$150.00	\$122.50	\$115.00	\$90.00	N/A	\$130.00	N/A
Four & Five Year Old	\$145.00	\$122.50	\$115.00	\$90.00	N/A	\$130.00	N/A
Before & After School	\$57.33	\$61.25	\$45.00	\$32.50	N/A	\$65.00	N/A
Full time School-Age	\$137.50	\$122.50	N/A	\$65.00	N/A	\$130.00	N/A

Table 9: Average Weekly Tuition Rates of Registered Homes in Webster County

	2011	2012	2013	2014	2015	2016
Infant (0 to 12 months)	\$112.38	\$120.42	\$127.80	\$123.30	\$139.05	\$119.64
Toddler (13 to 23 months)	\$111.84	\$119.24	\$126.00	\$121.05	\$139.05	\$119.64
Two Year Olds	\$110.24	\$116.41	\$125.55	\$120.15	\$135.90	\$116.79
Three Year Olds	\$110.24	\$114.63	\$124.65	\$120.15	\$135.90	\$116.92
Four and Five Year Olds	\$110.24	\$114.22	\$123.75	\$119.70	\$135.90	\$116.92
Before and After School	\$50.00	\$54.09	\$55.00	\$52.60	\$60.00	\$64.40
Full time School-Age	\$110.36	\$112.62	\$121.05	\$118.35	\$135.00	\$115.45

Table 10: Average Weekly Tuition Rates of Registered Homes in Surrounding Counties (2016)

	Boone	Calhoun	Greene	Hamilton	Humboldt	Pocahontas	Wright
Infant	\$127.71	\$123.75	\$120.00	\$129.60	\$120.13	\$112.50	\$121.95
Toddler	\$127.71	\$112.50	\$115.00	\$129.60	\$120.13	\$112.50	\$121.95
Two Year Old	\$127.04	\$112.50	\$115.00	\$129.60	\$120.13	\$112.50	\$121.95
Three Year Old	\$125.38	\$112.50	\$115.00	\$125.55	\$120.13	\$112.50	\$121.95
Four & Five Year Old	\$123.50	\$112.50	\$105.00	\$125.55	\$120.13	\$112.50	\$121.95
Before & After School	\$57.09	\$50.00	\$50.00	\$59.00	\$53.13	\$50.00	\$54.20
Full time School-Age	\$117.28	\$112.50	\$105.00	\$132.75	\$118.05	\$112.50	\$121.95

Child Care Labor Force

Within the Iowa Workforce Development's Northwest Iowa Area⁵ there are 700 child care workers and 50 child care and preschool administrators that are employed (this does not include home-based child care providers that are self-employed). The entry wage for child care workers in this area is \$8.09 while the mean wage is \$8.37. The entry wage for child care administrators in this area is \$11.73 and the mean is \$17.06.

⁴ Data not available for Humboldt or Wright Counties.

⁵ Buena Vista, Calhoun, Cherokee, Clay, Dickinson, Emmet, Hamilton, Hancock, Humboldt, Ida, Kossuth, Lyon, O'Brien, Osceola, Palo Alto, Plymouth, Pocahontas, Sac, Sioux, Webster, Winnebago, and Wright Counties.

Child Care Needs Survey

In April 2016, two electronic surveys were distributed in the community for the purpose of studying the need for more child care spaces in the Fort Dodge area. One survey was sent to several local employers and the other to the employees of those companies. Both surveys were also open to all employers and employees/parents. To reach more people links for the surveys were posted on the Linking Children and Families website and publicized through Facebook and a press release so that others in the community could participate as well.

Employer Survey Summary

A total of 11 employer surveys were completed. Companies that responded represented the following industries: Manufacturing (27%), Healthcare & Social Services (18%), Education (18%), Wholesale & Retail Trade (18%), Public Administration & Government (9.5%), and Other (9.5%). All of the employers responding said their labor force works Monday through Friday, in addition 73% work on Saturdays and 64% also work on Sundays.

When asked about their normal hours of operation, 7 employers shared that they operate 24-hours a day, while the remaining 4 open between 7:00 a.m. and 8:00 a.m. and close between 4:00 p.m. and 5:00 p.m. One noted that while their hours are day-time they also have some part-time employees that work evening and weekends only. The city noted that some staff such as police and firefighters must work 12-hour or 24-hour shifts.

The number of employers that stated their company has challenges related to productivity or employee absenteeism related to child care options or challenges was split almost evenly; 55% (6 employers) said no they had not had problems, while 45% (5 employers) said they had. In a separate question only 18% of employers stated they had had problems hiring due to child care options or challenges experienced by employees.

Employers were asked if they offered benefits to their employees or supported existing child care programs. A majority (91%) do offer a cafeteria plan or flex spending that allows employees to deduct pre-tax dollars from their wages to help pay for child care expenses. Additionally, two employers provided some child care information in their employee orientation or handbook. No employers are directly supporting existing child care scholarships or child care programs in the community.

Employers were then asked if a new community-based nonprofit child care center were built, if they would offer the same benefits. Many indicated they would consider financial support for scholarships as well as financial support for the construction and/or operations of a nonprofit center.

Table 11: Benefits Employers Would Offer if a New Nonprofit Center Were Started

	Yes	Maybe, need more information
Cafeteria Plan or Flex Spending Accounts for dependent care.	81.82%	9.09%
Child care information included in employee orientation or handbook.	63.64%	18.18%
Donation to a nonprofit child care program for scholarships for your employees.	0%	63.64%
Donation to a nonprofit for the construction of a new child care center.	0%	63.64%
Donation to a nonprofit child care program for general operating.	0%	54.55%
Donation to a nonprofit child care program for scholarships for all children.	0%	45.45%
Employee financial assistance or subsidy to pay for child care.	0%	36.36%

At the end of the survey employers were asked to share comments related to their employees’ needs related to child care, the supply of child care in the Fort Dodge area, and how it affects their company and/or employees.

Employer comments:

- There seems to be a lack of quality, affordable daycare options. Lots of in-home options, but haven’t heard fantastic things about many of them.
- Hours outside of normal working hours (8am-5pm) can be the most difficult in finding child care. Options for those who work outside of those hours would be extremely beneficial to employees.
- Clean center –Dependable consistent staff –Structure –Provides transportation (to and from school or activities) –Extended Hours for the center (including, off shift & weekends) –Drop In’s availability –Secure check in and out process.
- It would be nice if childcare center was available in the evenings, maybe until 8 pm

Employee Survey Summary

A total of 710 employee surveys were completed. Of those that responded 459 (65%) reported they currently have children age 12 or younger, 104 (15%) stated they do not currently have children age 12 or younger but might in the future, and 147 (20%) stated they do not currently have children age 12 or younger and do not plan to in the future.

Respondents are employed in the following industries: Healthcare & Social Services (39%), Education (28%), Manufacturing (18%), Public Administration & Government (5%), Wholesale & Retail Trade (3%), Communications, Transportation & Utilities (2.5%), Not employed/Student (2.5%), Accommodations & Food Service (1%), Professional Services (0.8%), Construction (0.1%), and Finance, Insurance & Real Estate (0.1%).

A majority of employees (79%) indicated they work a typical first shift schedule Monday through Friday, the next largest group was those that said their schedule fluctuates and they could potentially work any shift any day of the week (12%), the third most common work schedule was those working during the days on weekends (8%).

Respondents were asked to provide the zip code they currently live in. This information is helpful to determine of those how many live in the 50501 zip code versus how many live in other communities

where child care might be available. The most popular survey responses are shown below. The first column shows all respondents, the middle shows those that currently have children under the age of 12, and the right column shows those that do not have children now but might in the future. In all three groups Fort Dodge was the most common zip code given followed by Humboldt.

Table 12: Top 10 Respondents' Home Zip Code

All Respondents		Respondents w/Children Under Age 12		Respondents w/no children but Might in the Future	
50501 (<i>Fort Dodge</i>)	477	50501 (<i>Fort Dodge</i>)	313	50501 (<i>Fort Dodge</i>)	78
50548 (<i>Humboldt</i>)	33	50548 (<i>Humboldt</i>)	21	50548 (<i>Humboldt</i>)	5
50563 (<i>Manson</i>)	19	50563 (<i>Manson</i>)	14	50529 (<i>Dakota City</i>)	2
50516 (<i>Badger</i>)	14	50516 (<i>Badger</i>)	11	50516 (<i>Badger</i>)	2
50543 (<i>Gowrie</i>)	13	50532 (<i>Duncombe</i>)	8	50034 (<i>Blairsburg</i>)	1
50595 (<i>Webster City</i>)	13	50530 (<i>Dayton</i>)	7	50075 (<i>Ellsworth</i>)	1
50569 (<i>Otho</i>)	12	50533 (<i>Eagle Grove</i>)	7	50107 (<i>Grand Junction</i>)	1
50532 (<i>Duncombe</i>)	11	50561 (<i>Lytton</i>)	7	50246 (<i>Stanhope</i>)	1
50530 (<i>Dayton</i>)	9	50569 (<i>Otho</i>)	7	50532 (<i>Duncombe</i>)	1
50533 (<i>Eagle Grove</i>)	9	50595 (<i>Webster City</i>)	7	50541 (<i>Gilmore City</i>)	1

The majority of respondents (52%) have a household income over \$65,300 per year. That number increases slightly among households that currently have children under the age of 12 to 54%, and decreases significantly among households that currently do not have children might in the future.

Table 13: Annual Household Income

	All Respondents	Respondents w/Children Under Age 12	Respondents w/no children but Might in the Future
\$0-34,559	12.96%	12.85%	16.35%
\$34,600-\$39,599	5.49%	5.01%	9.62%
\$39,600- \$44,549	4.79%	4.14%	7.69%
\$44,550- \$49,449	5.21%	5.01%	3.85%
\$49,450- \$53,449	5.07%	5.01%	4.81%
\$53,450- \$57,399	3.94%	3.49%	4.81%
\$57,400- \$61,349	5.92%	5.88%	7.69%
\$61,350- \$65,299	5.07%	4.58%	7.69%
\$65,300+	51.55%	54.03%	37.5%

The majority of respondents have 2 or 3 people living in their household (47% combined). Household sizes increase among respondents that currently have children under the age of 12, with the majority having 3 or 4 people living in their household (64% combined), followed by 5 people living in their household (16%).

Table 14: Household Size

	All Respondents	Respondents w/Children Under Age 12	Respondents w/no children but Might in the Future
1 Person	5.92%	2.18%	16.35%
2 People	23.80%	8.71%	60.58%
3 People	23.52%	26.58%	10.58%
4 People	29.44%	37.91%	6.73%
5 People	11.55%	16.34%	3.85%
6 People	4.65%	6.75%	0.96%
7 People	0.42%	0.65%	0.00%
8+ People	0.70%	0.87%	0.96%

A total of 162 respondents indicated they plan to have or adopt children in the next three years. Of those that said yes, they do plan to have or adopt, 112 already have children. Among respondents that currently do not have children but might in the future, 46% indicated it would be in the next 3 to 5 years.

Table 15: Plans to Have Children in the Future

	All Respondents	Respondents w/Children Under Age 12	Respondents w/no children but Might in the Future
Yes, do plan to have or adopt	22.82%	24.40%	46.15%
No, do not plan to have or adopt	61.69%	59.91%	22.12%
Unsure	15.49%	15.69%	31.73%

Parents that currently have children under the age of 12 were asked if they had experienced challenges with work or school anytime in the last 12 months due to childcare challenges, a specific set of challenges were presented and parents were instructed to select all that apply. Over half of the parents said they had to leave or work school early or arrive late (58%). Other challenges that received responses were: had problems staying late or being able to work overtime (57%), or had missed an entire day of work of school because of child care challenges (55%).

Parents also cited not being able to change shifts or schedules (33%), producing lower quality of work (16%), problems scheduling school/classes (16%), problems keeping or accepting the job they wanted (13%), dropped or did not finish a class (7%), or had to quit a job or were fired (6%) as challenges.

Additionally, parents were asked if they had experienced difficulty finding child care. Over half of the parents with children under the age of 12 indicated it had been somewhat difficult (39%) or very difficult (21%) to find care when they were searching. Reasons it had been difficult were related almost exclusively to quality providers not having openings and schedules or hours including not accepting part-time enrollments. Only 13% of parents indicated it has been very easy to find care when they were looking and 27% stated it was somewhat easy.

Parent comments:

- My schedule needs flexible times, I work all shifts, on all days, and my child needs transportation to and from school.
- Care availability that meets our work schedule.

- Finding anyone that had an opening for an infant.
- Not enough of quality providers.
- Finding someone that can do overnights and be open long enough due to working 12 hour shifts.
- During school if there are scheduled days off or snow days there is nowhere available unless you pay a daycare weekly to hold that spot even if you don't need them routinely.
- It is very difficult finding back-up daycare for our 3 children when our primary daycare provider takes days off.
- I wanted an in home daycare but they were all full so I had to take my baby girl to a public type of facility run by an organization.
- Availability for 2 children of different ages.
- There aren't many good ones and moving into the area with an infant made it very difficult to get into any daycare let alone that one that I would prefer. I've been on the waiting list for the day care I want to be in for months.
- Daycare not open early mornings.
- Won't take part time kids.
- Nowhere to drop off before 6 am (when I have to be to work at 6:45, I have to leave my home by no later than 6), and no centers staying open until 8 pm when I typically return home from work.
- No one in town is accepting infants. I have been waiting a year now to get into a daycare of any sort (home or center).

Even though many faced challenges finding care, most parents (77%) indicated they are satisfied with their current child care arrangement.

The top reasons parents noted for dissatisfaction are:

- Scheduling- not open early enough, not staying open after 6:00 p.m., needing overnight care, not being able to attend part time without paying for a full time spot.
- Price/affordability- not able to pay for more hours than attending, not being able to pay higher prices charged by higher quality programs.
- Quality- poor reputation, too many children or exceeding adult to child ratios, not clean.
- Availability- no opening, long waiting lists, no one taking infants.

Parents that are not satisfied with their current arrangements are likely not using the type of care they most prefer. Most parents are having to use more than one child care arrangement to be able to overcome the reasons of dissatisfaction listed above.

Table 16: Child Care Preferences of Parents Not Satisfied with Current Arrangements

Currently Using <i>(Parents selected all that apply)</i>		Most Preferred <i>(Parents were allowed to select one)</i>	
Relative in their home	51%	Licensed Center	41%
Spouse/Partner stays home	38%	Registered Child Development Home	25%
Registered Child Development Home	31%	Spouse/Partner stays home	14%
Relative in my home	26%	School District Program	11%
Licensed Center	22%	Relative in my home	5%
Non-Registered Child Care Home	21%	Relative in their home	3%
School District Program	9%	Nanny/unrelated provider in my home	1%
Other	6%		
Nanny/unrelated provider in my home	3%		

When parents were asked if there were changes that could be made to their current child care arrangements that would allow them to be more productive at work or school, 28% indicated yes there were changes that would help. Many parents named changes like providers keeping children later to allow flexibility to stay at work late, better trained/competent child care staff would give them peace of mind, and providing transportation between school and child care would eliminate them having to leave work in the middle of the day allow them to have more time “on the clock”.

Parents comments:

- Be willing to watch children past 6pm and feed them supper if need be.
- Changing from a relative to a provider will allow more time for me to work on school so I don't have to work around my relatives' schedule.
- Being able to have a day care on campus would make me feel more confident in her child care.
- In our previous community, there was a "sick child" childcare option for children with certain, albeit limited, ailments. This allowed the guardians to maintain their career obligations for non-serious illnesses.
- I feel it would be beneficial to have a daycare provided for workers close to the hospital. That way if we get called in it would be easy to have coverage and changing shifts would be much easier.
- If I had an option for child care other than my spouse I would be able to work more hours.
- Daycare closes at 5pm no room to stay over to complete work.
- Longer hours, to be able to go into work earlier or stay later.
- Having the availability to drop kids as needed.
- If there is a more accessible daycare, then I would not have to fret about how my school age children are getting from point A to point B, who is picking them up and if they have to be home alone or not and if so, how long are they home alone for. This means my mind is not always on work and at times I have to stop and make phone calls to confirm arrangements and also at times to check in with the kids if they have to be latchkey kids.
- If I had a provider that would transport my child to school I could work more hours and help out more when needed. I could also work day shifts which are not an option now due to school transportation.

- Better trained baby room employees.
- If I knew that he was happy there I would not feel bad about leaving him there a little longer to give myself more time to finish projects and better manage my time at work.
- I wouldn't have to rush out of work to be home when my kids get home. I would also be able to go to trainings.
- I would use Saturdays to complete online classes when necessary.
- I wish our daycare was closer, it would make it more convenient for my husband and I as we live and work on the opposite side of town as are daycare is located. All the centers in our neighborhood have extensive waiting lists.
- It would be ideal to have onsite daycare at the Unity Point campus. There are many employees here with growing families that I'm sure would utilize the center. I previously worked at Unity Point Des Moines and utilized their daycare center. It was very convenient for drop off and pick up. As a nursing mother I was able to run over and nurse my child on break rather than pump. I never had to worry that daycare would be closed due to the weather or the provider being ill. I also didn't have to worry about planning my vacation around my daycare providers vacation. The onsite daycare center in Des Moines is amazing and offered me the flexibility I needed to excel at my career.
- Having a child care provider that is completely dependable would allow me to focus more on work activities. Having the ability to stay late for meetings or volunteer work would be wonderful.

Out of all 459 respondents that indicated they currently have children age of 12 and under, 454 are using some form of care while they are at work or school. Currently DHS Registered Child Development Homes are the most popular arrangement being used (34%), followed by a relative in their home (33%), spouse or partner staying home (26%), Non-Registered Homes (23%), Licensed Centers (20%), a relative in the child's home (18%), a school district program (7%), nanny or other unrelated caregiver in the child's home (4%), and the remaining 5% were variations of these types including a friend or neighbor or the child lives with the other parent during the week.

Preferences for future child care arrangements among all parents differ from what they are actually using today. Registered child development homes remain the top preference (33%) but Licensed Center moves up to second (26%), followed by spouse or partner stays home (15%), relative in their home (8%), relative in the child's home (7%), school district program (6%), Non-Registered Home (3%), and nanny or unrelated caregiver in the child's home (2%).

Table 17: Current Child Care Arrangements of All Respondents

	Currently Used	Preferred
Registered Home Day Care or Provider	33.69%	33.01%
Relative in their home	32.61%	7.71%
Spouse/Partner stayed home	26.15%	15.18%
Non-registered Home Day Care or Provider	22.91%	2.65%
Licensed Center	19.68%	26.02%
Relative in your home	17.52%	7.47%
School District Program	6.74%	7.47%
Other	4.85%	0.00%
Nanny or other unrelated caregiver in your home	3.77%	2.41%

The majority of parents currently using child care drop-off their child off between 6:00 and 8:00 AM and pick them up between 4:00 and 6:00 PM. Another group of parents entered a start time between 3:00 and 4:00 PM, indicating their need for After-School Care. Additionally, most parents that currently have children say they need care Monday through Friday (90-94% per day), while 14% say they need care on Saturdays and 11% on Sundays.

When asked about future preferences most parents would still prefer to drop-off their child between 6:00 and 8:00 AM but the pick-up time would extend to 4:00 to 7:00 PM. After-School Care is again reflected as a need for a start time between 3:00 and 4:00 PM. Parents would continue to prefer Monday through Friday care the most (93%-95% per day), 13% on Saturdays and 9% on Sundays. Additionally, 5 parents indicated they would like the flexibility of care anytime within a 24-hour period, while 7 others indicated they would prefer drop-off and pick-up times that would indicate they would need care during overnight hours.

When asked what time of year they need care, the majority of parents that currently have children under 12 indicated they need care year-round (75%), while 19% need school year only and 6% need summer only. When asked about future needs year-round increased to 79%, while school year and summer only decreased to 18% and 4%.

Most parents indicated their child care needs remain steady. When asked if their child care needs would ever fluctuate, 59% of parents that currently have children under the age of 12 answered no, their needs do not fluctuate; while 64% of those that do not have children currently but plan to in the future said their needs would not fluctuate. Despite these large numbers, a significant number of parents did answer yes their needs do fluctuate, 40% of those with children under age 12 and 35% of those planning to have children in the future. Reasons for fluctuation include rotating shifts, different schedules when school is out, and seasonal changes in work.

Table 18: Current Drop-Off and Pick-Up Times

Current Start/Drop-Off Time									
12:00-1:00 AM	3	6:00-6:59 AM	58	10:00-10:59 AM	1	3:00-3:59 PM	30	7:00-7:59 PM	2
3:00-3:59 AM	1	7:00-7:59 AM	198	11:00-11:59 AM	3	4:00-4:59 PM	6	8:00-8:59 PM	1
4:00-4:59 AM	2	8:00-8:59 AM	33	1:00-1:59 PM	4	5:00-5:59 PM	1	10:00-10:59 PM	1
5:00-5:59 AM	13	9:00-9:59 AM	3	2:00-2:59 PM	2	6:00-6:59 PM	3		

Current End/Pick-Up Time							
12:00-1:00 AM	2	8:00-8:59 AM	3	2:00-2:59 PM	6	7:00-7:59 PM	17
4:00-4:59 AM	0	9:00-9:59 AM	2	3:00-3:59 PM	14	8:00-8:59 PM	5
5:00-5:59 AM	1	11:00-11:59 AM	0	4:00-4:59 PM	75	9:00-9:59 PM	3
6:00-6:59 AM	0	12:00-12:59 PM	1	5:00-5:59 PM	189	10:00-10:59 PM	2
7:00-7:59 AM	5	1:00-1:59 PM	2	6:00-6:59 PM	35	11:00-11:59 PM	3

Table 19: Preferred Future Drop-Off and Pick-Up Times

Preferred Start/Drop-Off Time									
12:00-1:00 AM	3	6:00-6:59 AM	68	10:00-10:59 AM	1	3:00-3:59 PM	20	7:00-7:59 PM	2
3:00-3:59 AM	0	7:00-7:59 AM	216	11:00-11:59 AM	2	4:00-4:59 PM	4	8:00-8:59 PM	1
4:00-4:59 AM	0	8:00-8:59 AM	37	1:00-1:59 PM	3	5:00-5:59 PM	1	10:00-10:59 PM	1
5:00-5:59 AM	16	9:00-9:59 AM	5	2:00-2:59 PM	4	6:00-6:59 PM	3		

Preferred End/Pick-Up Time							
12:00-1:00 AM	1	8:00-8:59 AM	2	2:00-2:59 PM	6	7:00-7:59 PM	21
4:00-4:59 AM	1	9:00-9:59 AM	1	3:00-3:59 PM	13	8:00-8:59 PM	7
5:00-5:59 AM	2	11:00-11:59 AM	1	4:00-4:59 PM	61	9:00-9:59 PM	3
6:00-6:59 AM	1	12:00-12:59 PM	3	5:00-5:59 PM	191	10:00-10:59 PM	3
7:00-7:59 AM	3	1:00-1:59 PM	1	6:00-6:59 PM	63	11:00-11:59 PM	3

Parent comments:

- Swing shifts at work
- I rotate between days and nights every two weeks. Also on call on my days off and every other weekend.
- No school days or early out days.
- My schedule may or may not be set, and only need child care occasionally or at random times.
- Only when the older siblings are out of school (summer).
- Work different hours on different days. No places offer drop in.
- About every other weekend I would need child care.
- Fridays off.
- I work 12 hour shifts, 3 days a week and every 3rd weekend so days vary. Pick up varies between 4-6 pm.
- Spouse is on swing shifts and many not need daycare some days.
- My husband is a farmer and my schedule at work fluctuates based on customer requests.
- Summer care for my school aged child.

- Constantly fluctuating, often having to return to work after coming home and letting the sitter go home.

Parents were asked if they preferred a child care arrangement that was close to home, work, within the school district their child attends/will attend, or if they had no preference. Just over 34% preferred close to home while nearly 31% prefer close to work. Comparatively 18% preferred within their school district were and 17% have no preference on location.

The overall most important factor to parents when choosing child care is the staff. When parents were asked to pick the one factor that is most important to them, caring provider/staff was at 43%, followed by dependable provider/staff at 27%. When asked to select up to 5 more factors that are important to them dependable provider/staff was again top with 55%, followed by caring provider/staff at 45%. It should be noted that when asked to select up to 5 factors it was possible for parents to select both dependable provider/staff and caring provider/staff.

Other factors that were important to parents included location which was selected by 44% of respondents, upkeep/appearance of the facility and playground with 33%, and educational curriculum used with 29% rounded-out the top 5 factors.

Table 20: Most Important Factor for Selecting Care

What one factor will be most important when selecting care in the future	Response Percent	Response Total
Caring provider/staff	42.89%	178
Dependable provider/staff	26.75%	111
Transportation to/from school or preschool	5.78%	24
Educational curriculum used	5.54%	23
Drop-in or occasional care	2.41%	10
Tuition rates or price	2.41%	10
Part-time options	1.93%	8
Care includes preschool	1.69%	7
Iowa Quality Rating System (QRS) rating	1.69%	7
Location	1.69%	7
Upkeep/appearance of the facility and playground	1.69%	7
Special needs care	1.20%	5
Sick care	0.96%	4
Structured schedule	0.96%	4
Ages served	0.72%	3
Second-shift care	0.72%	3
Tuition assistance	0.72%	3
Secured entrance	0.42%	1

Table 21: Additional Factors that are Important When Selecting Care

Additional factors that will be important when selecting care in the future (select up to 5)	Response Percent	Response Total
Dependable provider/staff	54.94%	228
Caring provider/staff	45.30%	188
Location	44.34%	184
Upkeep/appearance of the facility and playground	33.25%	138
Educational curriculum used	28.92%	120
Transportation to/from school or preschool	28.92%	120
Structured schedule	27.23%	113
Tuition rates or price	26.27%	109
Drop-in or occasional care	19.52%	81
Sick care	18.07%	75
Ages served	16.87%	70
Part-time options	16.14%	67
Secured entrance	15.66%	65
Iowa Quality Rating System (QRS) rating	14.46%	60
Care includes preschool	14.22%	59
Second-shift care	5.30%	22
Tuition assistance	4.58%	19
Special needs care	2.89%	12

The final question of the survey was an open-ended comment allowing all respondents to share their concerns on the availability or quality of child care in the Fort Dodge area.

Sampling of respondent comments:

- Not enough availability for people who work evenings, nights, or weekends. Also, care for children over 12 years old or adults who have disabilities or otherwise cannot be left alone, who's guardian/s work evenings, nights, and weekends. Friendship Haven's adult daycare is only open until 6pm. I'm a single parent with a 13 year old who is autistic and cannot be left alone. I work 12 hour night shifts and I would have no options for care for him while I work if my parents didn't live in the area. I have to take time off from work or make arrangements to switch shifts with a co-worker when my parents aren't able to watch him.
- There are definitely not enough quality providers. I have had issues in the past finding someone and many of my acquaintances have also. I prefer someone who does it with care and compassion and not just for the income. Those providers are always full.
- Centers are far too expensive and private in home daycares are not as dependable...no happy medium.
- We need more. I was very fortunate to get into the current Day Care I am in. I know there is a very long waiting line for the center I take my child to-I think that says a lot. Wish more people could benefit from good caring/nurturing people.
- We found it basically impossible to find a licensed day care center with an opening that worked for us, so my spouse is staying home.
- It's very difficult when looking we called over 20 providers none had openings.
- It is hard to find a child provider for infants. Transportation to and from the schools is important.

- There is not adequate child care availability for people who have to work nights or weekend shifts.
- Some students attending classes at Iowa Central often have to miss class or drop classes entirely because child care is either unavailable when/where they need it or too expensive for them to afford.
- I feel that we lack in quality child care in Fort Dodge. I would like to see a well kept, secure facility that provides a good learning environment for children of all ages.
- Difficult to find spots in reliable home daycares.
- Since relocating to Fort Dodge I have been shocked at the limited availability of quality child care in the area. For the size of the town there seems to be quite the shortage of child care options. I rely heavily on family at this point but if that wasn't an option (and may not be in the future) myself or my husband would have to quit our job to stay home with the children. We have 2 young kids at this point and plan to have at least 2 more over the next 5-7 years. It would be nice to have a better child care option before we plan for the next child.
- There are not enough quality daycare centers in town, staff have a high turnover, and the cost for decent daycare makes it more palatable for one parent to stay home instead of work to pay daycare costs.
- There is little availability for people moving in to town especially if you do not know someone who can recommend or give you information. It is very scary to leave your kids somewhere and you want to know other people or have good resources to know they are being well cared for.
- There is an extreme lack of providers. Waiting lists for infants is more than a year. Most people can't plan 2 years ahead of time when they will be having a baby to get on a list. Without family member help, I would have had to quit my job due to the lack of childcare in this town. It's very concerning.

Key Findings

These key findings are based on research and conditions of the child care market in Fort Dodge at a specific point in time. If the community or the child care environment experience changes, current challenges may be resolved or these findings may no longer be relevant.

Declining Population, Growing Child-Bearing Cohort

The total population of Fort Dodge has been declining over the last several decades. Since the 2000 Census the age cohort 25-34 years-old has been increasing while the age cohort 0-9 years-old has been decreasing. These changes may indicate that while there are more adults of child bearing age living in Fort Dodge, they are having fewer children.

Large Regional Labor Force

The total potential labor force of the regional laborshed is 137,219, this includes people living in other communities but willing to drive to the area for work; some come from as far north as Algona, as far east as Iowa Falls, as far west as Storm Lake and as far south as Ogden. The top industries based on the total number of employees are wholesale and retail, followed by health care and social services. Both of these industries tend to have nontraditional or extended work hours for their employees, with many working outside of the hours of 8:00 a.m. to 5:00 p.m. and some even on 12-hour shifts.

Most Parents Work Outside the Home

Most families that live in Fort Dodge have parents that work outside of the home. Eighty six percent of families with children under the age of 6 and 80% of families with children ages 6-17 have all parents working. That means if a family is headed by a couple both parents are working and if it is a headed by a single parent that parent is working. This shows that most children need some form of care while their parents are working.

Family Incomes Higher than Child Care Assistance Thresholds

A majority of parents completing the child care needs survey indicated their family size is 3 or 4 and their annual household income exceeds \$63,500 per year. To qualify for the Iowa Child Care Assistance (CCA) program according to the 2016 eligibility criteria, a family of 3 must have an annual household income below \$29,232 and a family of 4 must have an annual household income below \$35,235.

Declining Child Care Supply

The supply of child care in Webster County has declined over the last five years. Since 2011, the county has lost 111 providers/programs and 530 DHS licensed child care spaces. Today there are 2,185 spaces within licensed centers and registered and non-registered homes across the county; 1,821 of those spaces are in Fort Dodge.

Shortage of Child Care Spaces

According to the 2010 Census there were 3,934 children ages 0 to 12 living in Fort Dodge. Based on the percentage of families with children that have all parents working, approximately 3,239 children will need some form of child care. With 1,601 child care spaces and another 344 preschool spaces there is a potential shortage of 1,294 spaces. The shortage is 1,638 if preschool is subtracted and only child care spaces are considered.

Parents Having Difficulty Finding Quality Care

When asked if they had difficulty finding care, 60% indicated they had. The most common reasons cited were difficulties related to scheduling or the providers' hours of care, no openings within quality homes/centers, and no one able to take more infants. As of November 2016 there were only 456 infant and toddler spaces, and an estimated 777 children ages 0 to 2 that need care.

When parents are able to make child care arrangements they are not always able to put their child in the child care environment of their preference. Currently, the most common form of care used by parents that are not satisfied with their current arrangement is a relative providing care in their home, followed by a spouse or partner staying home, and then registered child development homes. Parents indicated they would actually prefer to use licensed centers, followed by registered child development homes, and then their spouse or partner staying home with their children.

In comparison, the most common current arrangement used by all parents is a registered child development home, followed by a relative in their home, and then a spouse or partner staying home. These parents indicated they would actually prefer to a registered child development home, followed by licensed centers, and then their spouse or partner staying home.

Employers Feel the Effects of Child Care Challenges

Half of the employers that completed the child care needs survey indicated that their company had experienced employee absenteeism due to child care issues; while 18% indicated they had had problems hiring new employees due to child care issues.

In addition, 58% of parents with children under the age of 12 answered that child care challenges had caused them to arrive at work late or leave early, 57% answered that they were not able to stay late or work overtime, and 55% had missed an entire day due to child care challenges.

Meeting the Community's Future Needs

First Children's Finance's research provided valuable information that can help shape what the future of child care looks like in the Fort Dodge community. Based on the market research and parent input from the survey, it can be concluded that the community of Fort Dodge does need more quality child care spaces. To best meet the needs and preferences of the community, new spaces will provide:

- Child care between 6:00 a.m. and 6:00 p.m., Monday through Friday.
- Extended care options both earlier in the day and later in the evening, opening as early as 5:00 a.m. and staying open as late as 8:00 p.m. This could be a limited number of spaces within a larger program.
- A quality environment. A licensed center or registered child development home that uses an evidence-based curriculum and participates in quality initiatives such as the Iowa Quality Rating System (QRS) or Child Net would demonstrate the type of quality desired by parents.
- Newly created spaces must include a significant number of infant and toddler spaces, as this seems to be the ages for which parents have the most difficulty finding care.

Attachments

Child Care Needs Survey Results