2026 CCI CHILD CARE LANDSCAPE ASSESSMENT

# Child Care Landscape Survey Results

*A snapshot of workforce, capacity, affordability, quality, and access — in the words and numbers of providers in Charlevoix & Emmet Counties.*

WHO WE HEARD FROM

**58** total respondents across both counties

**36%** n=21
**Own or administer a program**
Centers, family/group child care & small-capacity programs

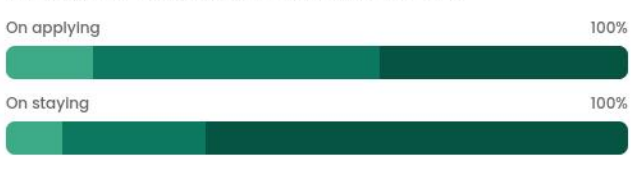
**64%** n=37
**Work in a program**
Primarily child care centers & small-capacity programs

WORKFORCE

## Why people join — and what makes them stay

Passion for children drives recruitment. Wages and workplace conditions determine whether people stay.

STAFF/TEACHER — IMPACT OF WAGES ON CURRENT POSITION

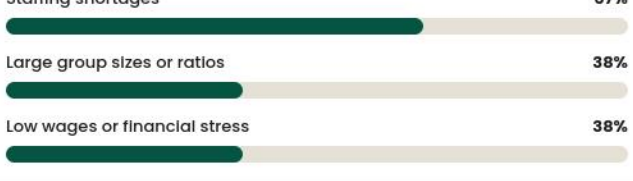



**68%**
of staff say wages are very impactful in their decision to **stay** — their #1 retention factor.

EMOTIONAL EXHAUSTION — HOW OFTEN DO YOU FEEL THIS WAY?

**52%** feel emotionally exhausted **always or often.**

TOP SOURCES OF STRESS (TOP 3 SELECTED)




CURRENT AVG WAGE
**$20.66/hr**
range $15.00 – $25.96

GOAL IN 5 YEARS
**$24.76/hr**
range $20.00 – $30.00

LONG-TERM INTENT — PLAN TO STAY UNTIL RETIREMENT

**80%** OWNERS & ADMINS

**41%** STAFF & TEACHERS

In a field with national annual turnover rates of 21–38%, this level of long-term commitment is a significant community asset — and one that must be protected through investment in compensation and working conditions.

CAPACITY

## Enrollment, openings, and room to grow

More than half of programs have open slots. The limiting factor is staffing, not demand.

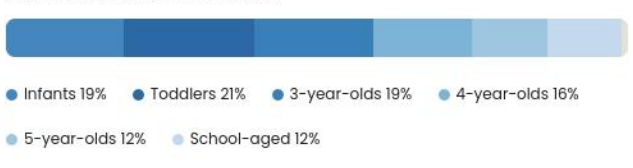
AT LICENSED CAPACITY?

**56%** below capacity — mostly by design or staffing limits

WANT TO EXPAND?

39% yes · 44% no · 17% unsure

CURRENT ENROLLMENT BY AGE GROUP




TO EXPAND, PROGRAMS NEED

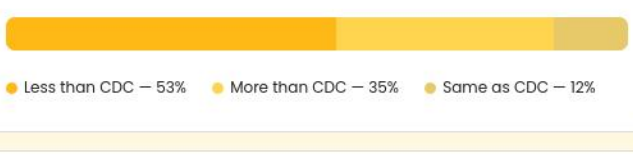



AFFORDABILITY

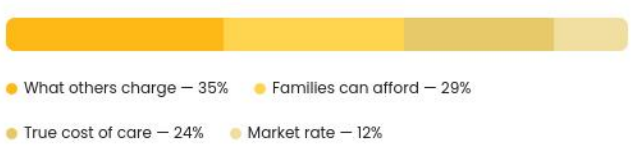
## What families pay — and what care really costs

Most programs price below the state reimbursement benchmark, creating a structural gap between revenue and sustainability.

TUITION RATES VS. CDC REIMBURSEMENT RATE

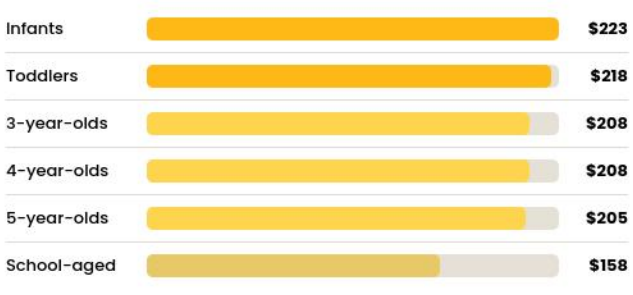



HOW PROGRAMS DECIDE WHAT TO CHARGE




Just **24%** charge the true cost of care — and **53%** charge *less* than the CDC reimbursement rate.

AVERAGE WEEKLY FULL-TIME TUITION BY AGE




QUALITY

## What quality looks like — and what's in the way

Providers and staff agree on what quality means. The gap is resources to deliver it consistently.

TOP 3 QUALITY INDICATORS

1. Warm, responsive relationships between teachers and children **75%**
2. Play-based learning that is intentional and developmentally appropriate **65%**
3. Access to outdoor play and physical activity **40%**

ADMINISTRATORS — HAVE WHAT YOU NEED?

**35%** say they lack what they need for quality

IF NO — WHAT'S NEEDED?

GREAT START TO QUALITY RATING DISTRIBUTION

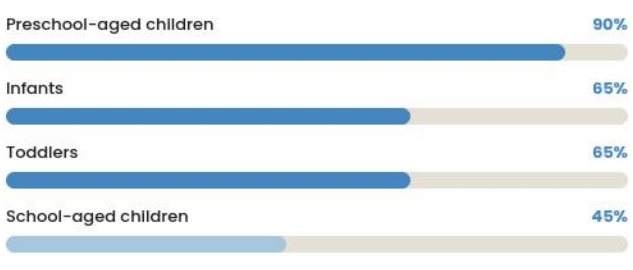
**45%** working toward next GSQ level · **89%** of staff say they work in a quality program

ACCESSIBILITY

## Who programs serve — and where gaps remain

Programs broadly accept subsidies and serve a wide age range, but staffing limits capacity to grow.

AGE GROUPS SERVED




ACCEPT CDC SCHOLARSHIP?

Essential support for family access to care

**22%**
would enroll more children if they had more staff

VOICES FROM THE FIELD

## What would most improve child care in your community?

Open-ended responses, grouped by theme and ordered by frequency.

01 **Adequate funding & competitive wages** — grants, subsidies, living wages
02 **Staffing support & better ratios** — consistent staff, manageable class sizes
03 **More accessible, affordable programs** — 0–3 care, employer-supported
04 **Parent involvement & community understanding** — of what providers do every day
05 **Licensing reform & fewer barriers** — so more programs are willing to open

> *"The biggest improvement our community could make is finding a sustainable model that both supports and fairly compensates qualified early childhood educators while still remaining affordable for families."*
> OWNER & ADMINISTRATOR

> *"I would love to be getting paid more. Me and so many other teachers at my school are unable to afford their essential bills and work multiple jobs."*
> STAFF & TEACHER

> *"Easier licensing to follow, so more programs would be willing to open."*
> STAFF & TEACHER

*Strong child care depends on a stable, well-compensated workforce — and on communities willing to invest in it.*