



QUALITY CARE  
*for* CHILDREN

# 2023 Provider Pulse Check

Annual Child Care Provider Survey



# Executive Summary

With over 40 years of experience, Quality Care for Children (QCC) is an industry leader working hard for Georgia's infants and young children. QCC's comprehensive approach involves working directly with Georgia's children, parents, and child care providers. The data and findings from our programs, surveys and story-gathering are leveraged to advocate for policies that promote child care quality and affordability at the local, state, and national levels.

In April 2023, Quality Care for Children sent out its [annual Provider Pulse Check survey](#) to better understand the current experience for Georgia's child care providers and to identify opportunities where support is needed. The survey was sent out to all licensed child care learning centers and family child care learning homes across Georgia. A total of 430 providers responded, representing 103 of Georgia's 159 counties, including 250 center-based providers.



While Georgia continues to bounce back from the coronavirus pandemic, the survey shows the child care community has lagged behind. Compared to pre-pandemic levels, the sector's workforce has been devastated, with 72 percent of centers reporting teacher shortages and 78 percent of programs finding it difficult to hire staff for vacancies. Child care centers reported, on average, the need to fill more than three vacant positions. Due to these teacher shortages, child care centers have had to close classrooms, the majority of those being classrooms for infants, toddlers, and three-year-olds.

Thanks to increased federal and state funds, Georgia child care providers have striven to stabilize the workforce, with 75 percent of centers increasing wages in an effort to retain teachers. However, with inflation continuing to rise and the state's increased subsidy payments scheduled to end in October 2023, the low wages of child care providers in Georgia that existed prior to the pandemic set an even greater challenge for workforce retention. In 2022, the average pay for a child care worker in Georgia was \$12.58 per hour, landing among the lowest-paid occupations, according to the Bureau of Labor Statistics.

QCC continues to focus on ensuring both quality and sustainability of child care providers in Georgia. With only 28 percent of providers being very comfortable with financial statements, QCC works provides business coaching and budgeting tools to help providers maintain salary increases and hire substitutes as needed.

Given the current challenges with supply, it is not surprising that demand for child care in Georgia is growing. According to our survey, over 55 percent of all respondents in Georgia have increased their wait lists since the pandemic. The inability of providers to meet demand is impacting Georgia's families and workforce. Nearly one in four parents [reported](#) being fired last year due to the system's continuing breakdown and inability to find a quality, affordable child care.

# 2023 Survey Highlights



## Statistics of Respondents

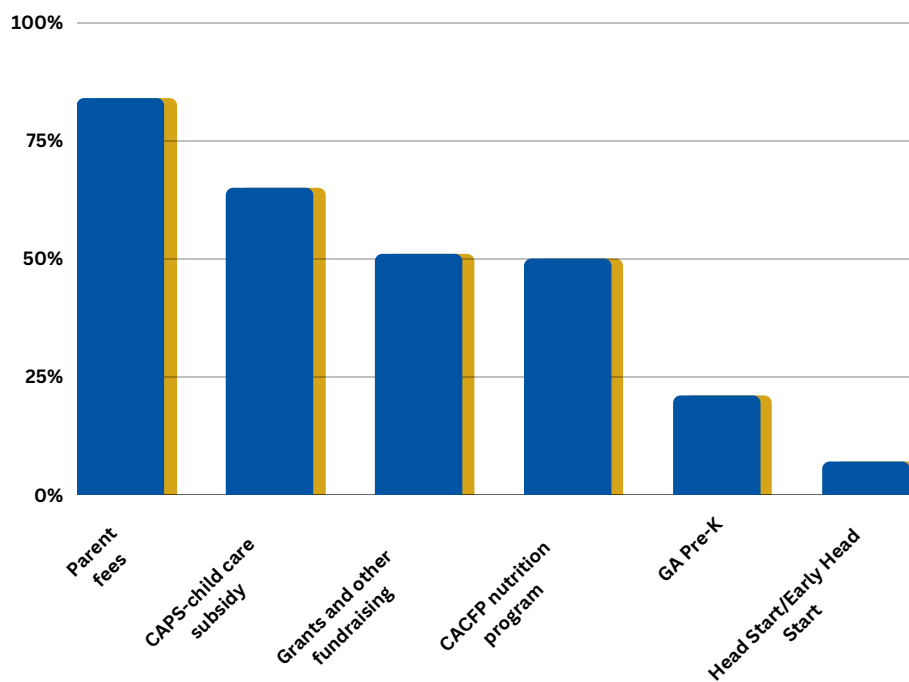
QCC [surveyed](#) licensed child care programs (centers and family child care) to get a sense of concerns and needs in April 2023.

- 430 child care provider responses
- Average program size/enrollment: 62 children
- Average length of waitlist: 20 children
- 60% were from child care center programs (for profit, not for profit, etc.) and 40% were from family child care

## Funding Sources

Most programs use a variety and combination of funding sources, with the majority relying primarily on parent fees and child care subsidy dollars as the second most prevalent source of funding. The data shows how fees collected from parents are not enough for most providers to operate a sustainable program.

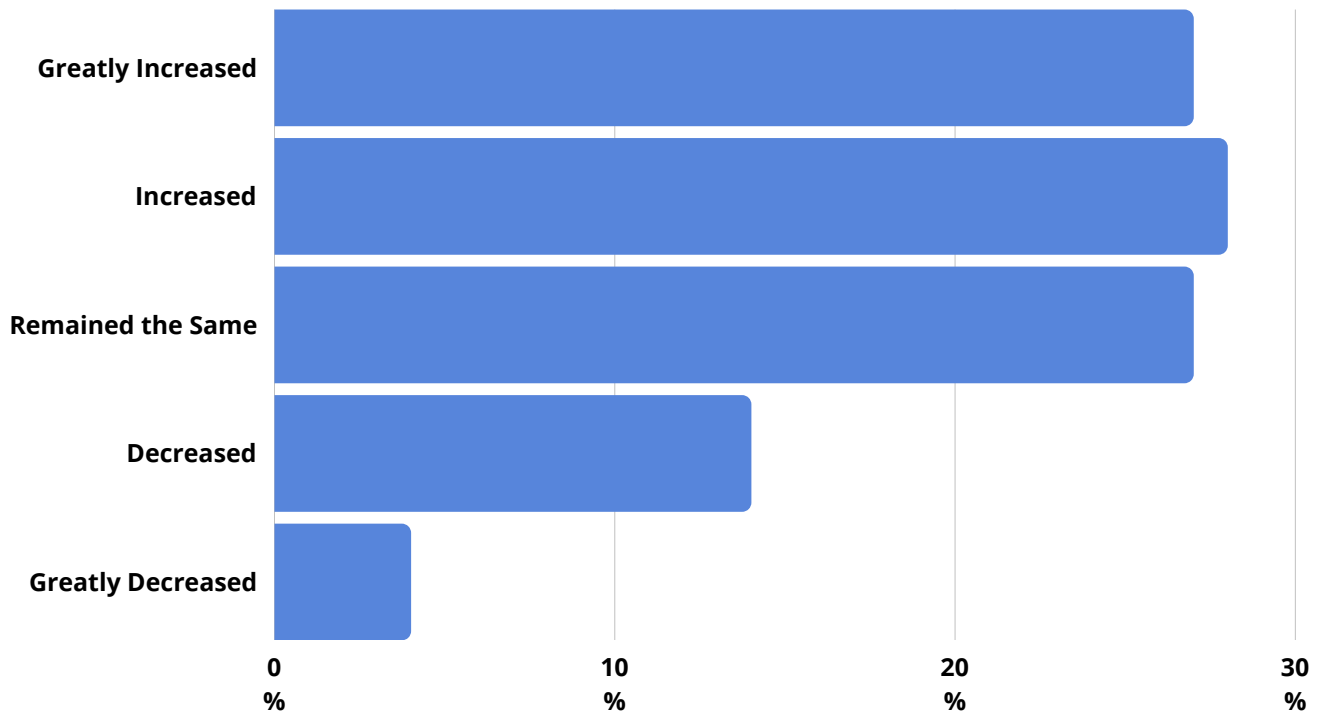
### Sources of Funding



## Impact of Teacher Shortages

Children and families are going unserved. **Over 55% of providers have increased their waitlists since the pandemic.** Programs' waitlists continue to increase, averaging about 20 children waiting for new enrollment. One provider commented, "I wish I could have a couple more children. The need in my town is so bad we only have a few places for parents." Another one shared how "I wish there was funding to assist in purchasing to move into a larger child care center."

### Waitlists since COVID



In the past three months, half of child care centers reported having experienced teacher shortages over 25% of the time. Due to teacher shortages, child care centers have had to close classrooms which greatly impacts infants, toddlers, and three-year-olds classrooms the most. Overwhelmingly, **78% of programs expressed difficulty when hiring staff.**

Unfortunately, child care programs are competing with retail jobs when recruiting staff. Since the pandemic, more retail jobs starting pay is \$15 an hour for comparatively unskilled and/or untrained labor. **75% of child care centers increased teacher pay to help retain teachers.** Other incentives offered to help retain staff are:

- Increased benefits
- More flexible hours
- Tuition discounts
- Professional development
- Monetary incentives
- More team-building activities
- Other



## Utilizing Substitute Teachers

Child care center leaders are using a variety of methods to continue operating during teacher shortages. Programs are using the strategies listed below to sustain business. Those experiencing the most teacher shortages are working in classrooms themselves, using paid substitutes, or having to use non-teaching staff in classrooms. Other approaches include transferring children among classes, combining classes, or ultimately closing classes.

Those who needed substitutes usually found them through personal contacts with 30% of providers paying less than \$12 per hour and 20% offering \$12-\$15 per hour.



**“Having a regular substitute available would greatly benefit my program; less closures.”**



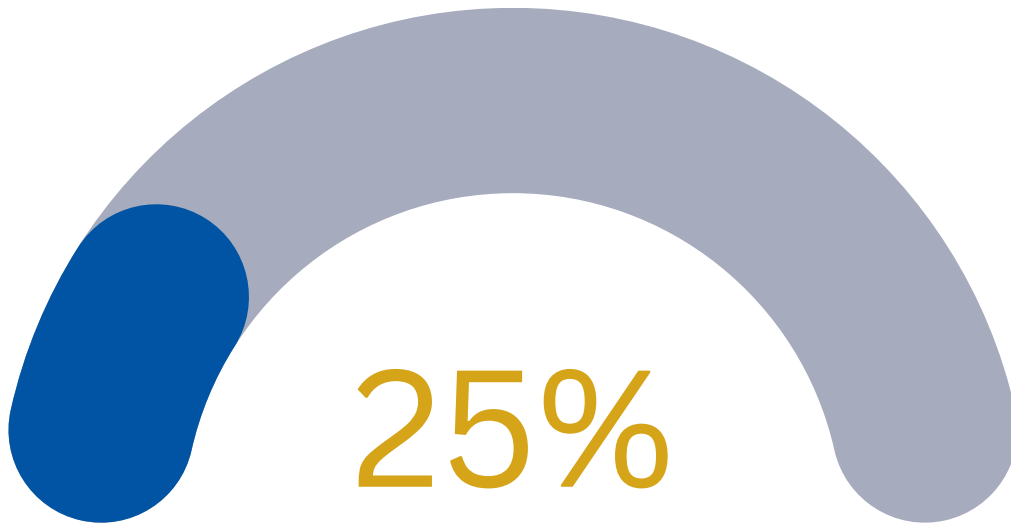
**“I wish there was a list of providers that would substitute as needed.”**

Child care programs that were successful in finding help report having hired high-quality substitutes about one-third of the time; the majority of substitutes were neither especially high- nor low-quality. Many child care programs reported a need for a qualified pool of substitutes.

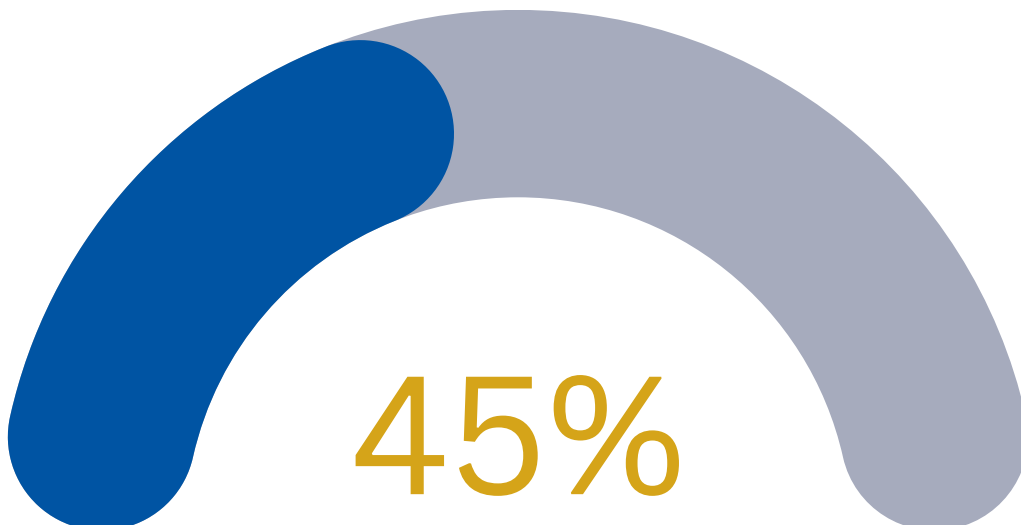
## Business Operations

When handling day-to-day operations, the majority of programs report feeling very or somewhat comfortable with billing, invoicing and collecting payments. Yet, when it comes to understanding profit and loss, balance sheets and cash flow, just 55% are comfortable understanding and generating financial statements. These are still areas of great need to help providers forecast market trends to increase sustainability.

*25% of providers surveyed stated that they are very comfortable completing taxes*



*45% of providers surveyed stated that they have some trouble understanding financial statements  
(profit & loss, balance sheets, cash flow)*

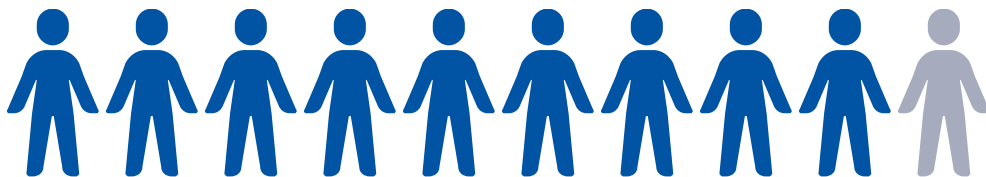




## The State of Mental Health

Positive aspects of mental health have improved within the last three months. A majority of providers saw an increase in their optimism and satisfaction despite teacher shortages or operational challenges.

90% of providers surveyed had a boost in or the same level of **optimism** over the last 3 months



88% of providers surveyed had a boost in overall **satisfaction** within the last 3 months

The majority of child care respondents reported staying the same or very little increase in negative aspects of mental health.



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