



TPMA

OCTOBER UPDATE

Child Care Action and Investment Plan

October 31, 2024



Invest Hamilton County is the economic development organization for Hamilton County, Indiana. Our mission is to **empower economic vitality** for businesses and residents in the county. We lead with data-driven insights, ensuring **sustainable growth and prosperity.**

For **community champions** who are improving local and regional economic outcomes, TPMA provides professional consulting services and delivers transparent insights about **workforce, education, and economic development ecosystems** that allows communities to **move forward, together.**

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Project Overview



Stakeholder Engagement Summary



Workforce & Wage Availability Analysis



Impact Analysis Review



Next Steps



The overall goal is to identify and address the *needs and barriers faced by employers and childcare providers, thereby bridging the gap in quality childcare provision in Hamilton County.*

- 1** Identify potential solutions based on data and community input.
- 2** Detail relevant investment opportunities and relevant timelines, costs, and partnerships.
- 3** Provide goals and indicators of success.





Project Tasks/Descriptions		Mar	Apr	May	June	July	Aug	Sep	Oct	Nov	TPMA	Invest Hamilton County
Task 1	Launch & Administration	3/6									●	●
Task 2	Discovery & Initial Analysis			3/31							●	●
2.1	Doc Review		3								●	
2.2	Data Collection										●	
2.3	Initial Analysis (Demo/Econ/Ec. Data)			1							●	
Task 3	Stakeholder Engagement						8/31				●	●
3.1	First Community Convening		17								●	●
3.2	Focus Groups										●	
3.3	Stakeholder Surveys										●	
3.4	1:1 Interviews										●	
Task 4	Full Analysis & Investment Forecasting								10/31		●	
4.1	Stakeholder Engagement Summary						21				●	
4.2	Needs, Gaps, & Barriers Assessment							4			●	
4.3	Childcare Collaborative Investment								2		●	
Task 5	Final Action & Investment Plan									11/30	●	●
5.1	Final Report Draft								16		●	
5.2	Final Report									13	●	
5.3	Final Report Presentation									27	●	●
Hamilton Bi-Weekly Meetings		20	3,17	1,15,29	12,26	10,24	7,21	4,18	2,16,30	13,27	●	●
TPMA Bi-Weekly Progress Meetings		12,26	9,23	7,21	4,18	2,16,30	13,27	10,24	8,22	5,19	●	



Stakeholder Engagement Summary

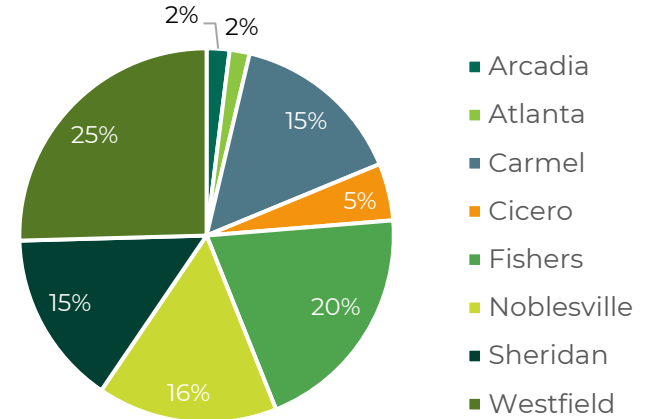
Hamilton County Childcare Action & Investment Plan

Events	Surveys	Focus Groups	Interviews
<ul style="list-style-type: none"> • First Community Convening (April 17, 2024) • October Community Convening (October 31, 2024) 	<ul style="list-style-type: none"> • Employer Survey • Parent Survey 	<ul style="list-style-type: none"> • Employer Focus Group (1) • Childcare Provider Focus Groups (2) • Non-profit/Multi-organizational Focus Group (1) 	<ul style="list-style-type: none"> • Local government representative interviews (3) • Large Hamilton County employer (1) • Early Childhood Wellness Advocacy Organization (1) • Education and Training Provider (1) • Charitable Foundation (1) • School Corporation providing after school care (1) • Brief provider phone interviews (2)

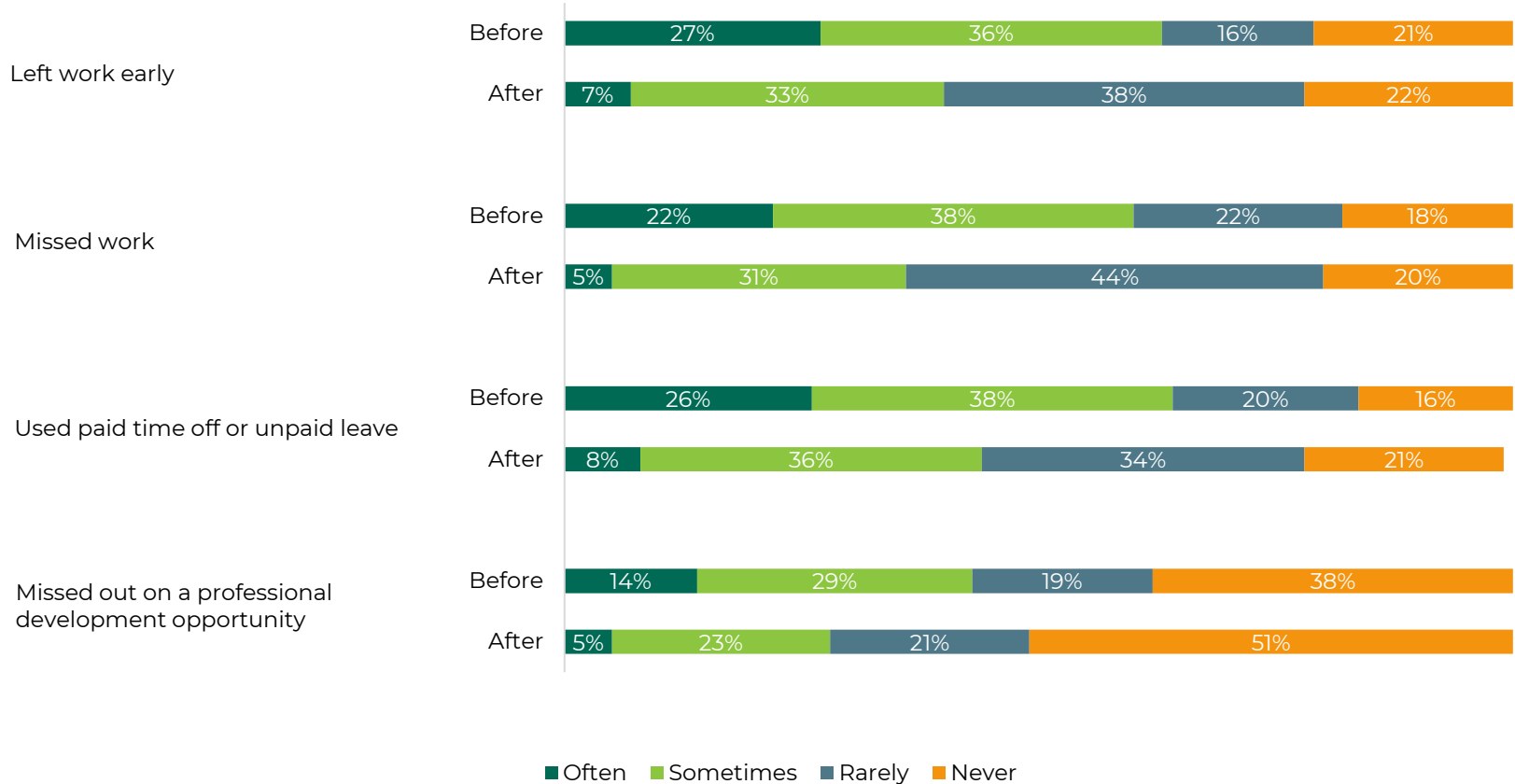
Parent Survey

491 responses, 404 usable; about half had children enrolled in facility (54%) and half did not have children enrolled (46%).

- Most parents identified as **2 Parent/Guardian household, both working full time or attending school** (68%) with **2-3 children** (67%), and the most selected industry was **Healthcare/Social Assistance** (26%).
- The top reasons for *not* enrolling children in childcare are **cost** (51%), one **parent staying home** (36%), and **a friend, family member, or in-home nanny** providing care (30%).
- The top challenges faced by those with children *enrolled* are **cost** (77%), **do not qualify for assistance** (57%), and **not enough open spots** (55%).
- Most parents (60%) **prefer an early childcare center** or place of business to other options.



How often did you experience the following because of inadequate childcare?



Parents reported spending less on dining out, vacations, extracurricular activities for children, and other non-essential expenses to afford the high cost of childcare. However, several respondents mentioned much greater sacrifices:

“Due to cost, [we] moved close to family to be able to help with childcare.”

“We delay paying other debt to pay for childcare.”

“We rack up credit card debt.”

“Having grandparents assist part-time so that we do not have to pay full price.”

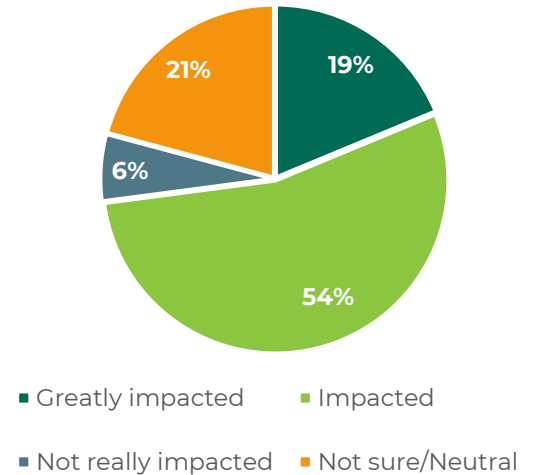
While some parents may have family members willing and able to assist in providing low-or-no-cost childcare, this is not an option for many. Indeed, family elders may also need care.

Employer Survey

63 responses, 48 usable

- Organization **size has the most impact on how much of a burden childcare is (harder for smaller organizations)**.
- Based on employer estimations, as many employees rely on family members for childcare as employees who rely on Center-based childcare
- Most employers (69%) feel **unaware of how to help** employees with early childcare or Pre-K issues.”
- All organizations who marked that they are greatly impacted by childcare issues also marked they are **unable to afford** to help employees with childcare.

Impact of childcare issues on Employers



Employer Survey

“Lack of childcare is the most profound impact on our ability to recruit and retrain professional staff.”
- Hamilton County Employer – Professional, Scientific, and Technical Services

Ways that employers try to address childcare issues:

- Allowing remote working and/or flexible shifts when possible (48%)
- DCFSA or similar (29%)
- Allowing parents to bring children to work (15%)
- On-site childcare (8%)
- Cost sharing incentives/stipends for employees (2%)
- Contract with provider for reserved seats (2%)
- None of the above (13%)

Number of Employees	Average Total Days Lost Over 6 Months
1 - 9	12.6
10 - 19	12.3
20 - 49	2.8
50 - 99	27.5
100 - 249	12.5
250 - 499	14.3
500-999	No data provided
1,000+	800

Interview Themes

Geography

- Northern areas lack access/options
- Workers may struggle to afford to live in county

Affordability

- Infancy and multiple children impact
- Lower-cost providers limited in capacity
- Schools and ministry-based can help fill some of affordability gap through shared institutional resources

Quality

- Safety is a prioritized aspect of quality
- Workers need flexibility to upskill/get credentialed
- Developmental delays and special needs services lacking

Employer Buy-In

- Lack employee data to inform decisions
- Those who don't have children 0-5 not concerned about issue

Focus Groups: childcare Providers

- Lower representation of home providers
- Pay, scheduling, and **finding qualified people**
 - *Importance of having staff who are the right people and want to work in the industry*
- Providers at capacity with waiting lists
- General payment feedback—**between \$16-25/hour**
- Safety vocalized as important to quality care
- **YMCA was mentioned as a place for care**
- One attendee recommended a provider “coach” as a resource—not just relying on paper/internet information about care

“As the county grows and plans new neighborhoods, they need to address the increase in families and that means more childcare is needed, but [the county isn't] planning for it.”
- Ministry Director

Focus Groups: Employer Focus Group

- Strong Sheridan presence
- **Workers/leadership who do not have children of early childcare age are not concerned about paying or providing care**
- Disproportionate effect on women—some not being able to work anymore
- Affordability- critical issue
- Interested in additional funding/ways to subsidize childcare

Childcare assistance examples:

- Coordination with school corporation for bus stop at employer
- Medical PTO- flexible scheduling and additional week for parents to attend wellness visits, etc.
- One company thinking through company daycare
- One company allows parents to bring in an infant up to 6 months old

Focus Groups: Non-Profit Focus Group

- More rural areas, **children with special needs or behavioral issues are underserved**
- Attendees did mention **critiques of home care providers**; however, they did discuss how it takes ample time and resources for quality care, which may be limited for some providers
- The **necessity of funding**—interest in braiding funding
- Mentioned how not all providers accept vouchers, which is a barrier for some families
- Discussed **potential usefulness of places of worship**, which often sit empty during the day; need more information resources about providing care



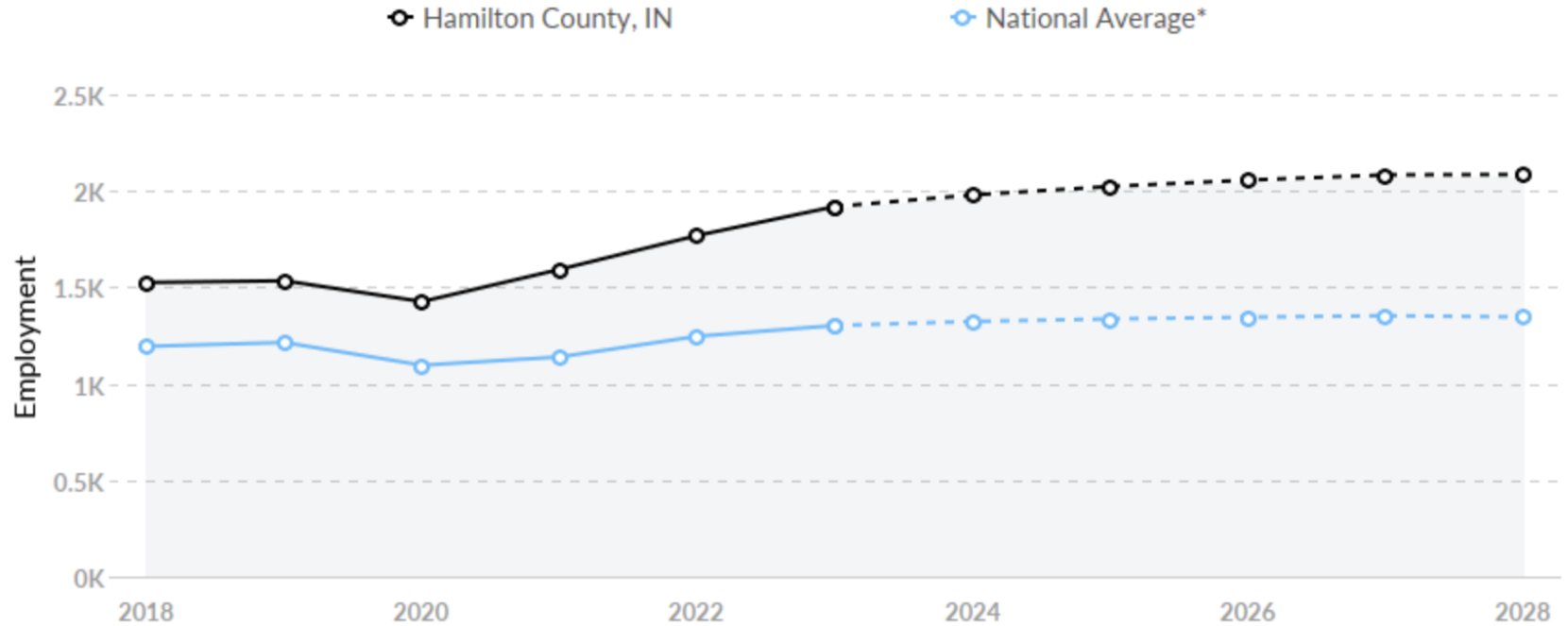
Workforce and Wage Availability Analysis Review

Hamilton County Childcare Action & Investment Plan

Child Care Professionals, Hamilton County, IN

26% Past Growth (2018 - 2023)

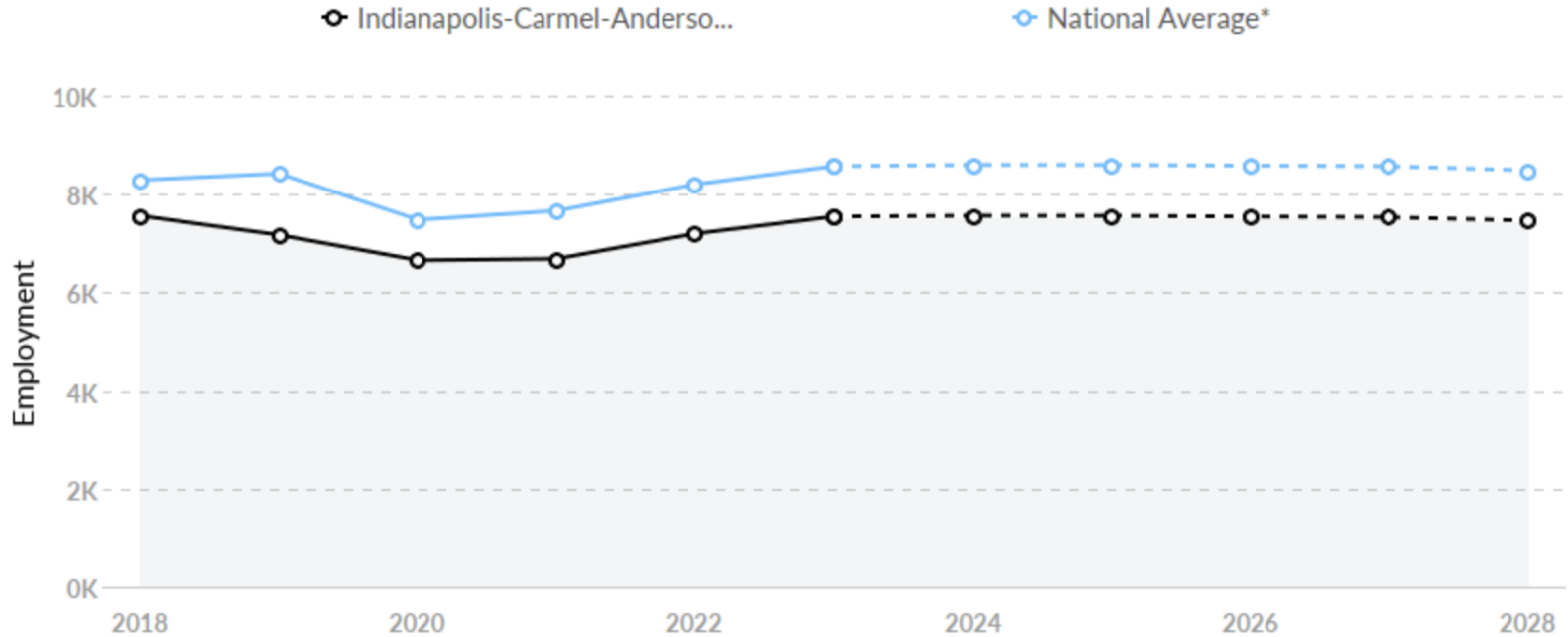
9% Projected Growth (2023 - 2028)



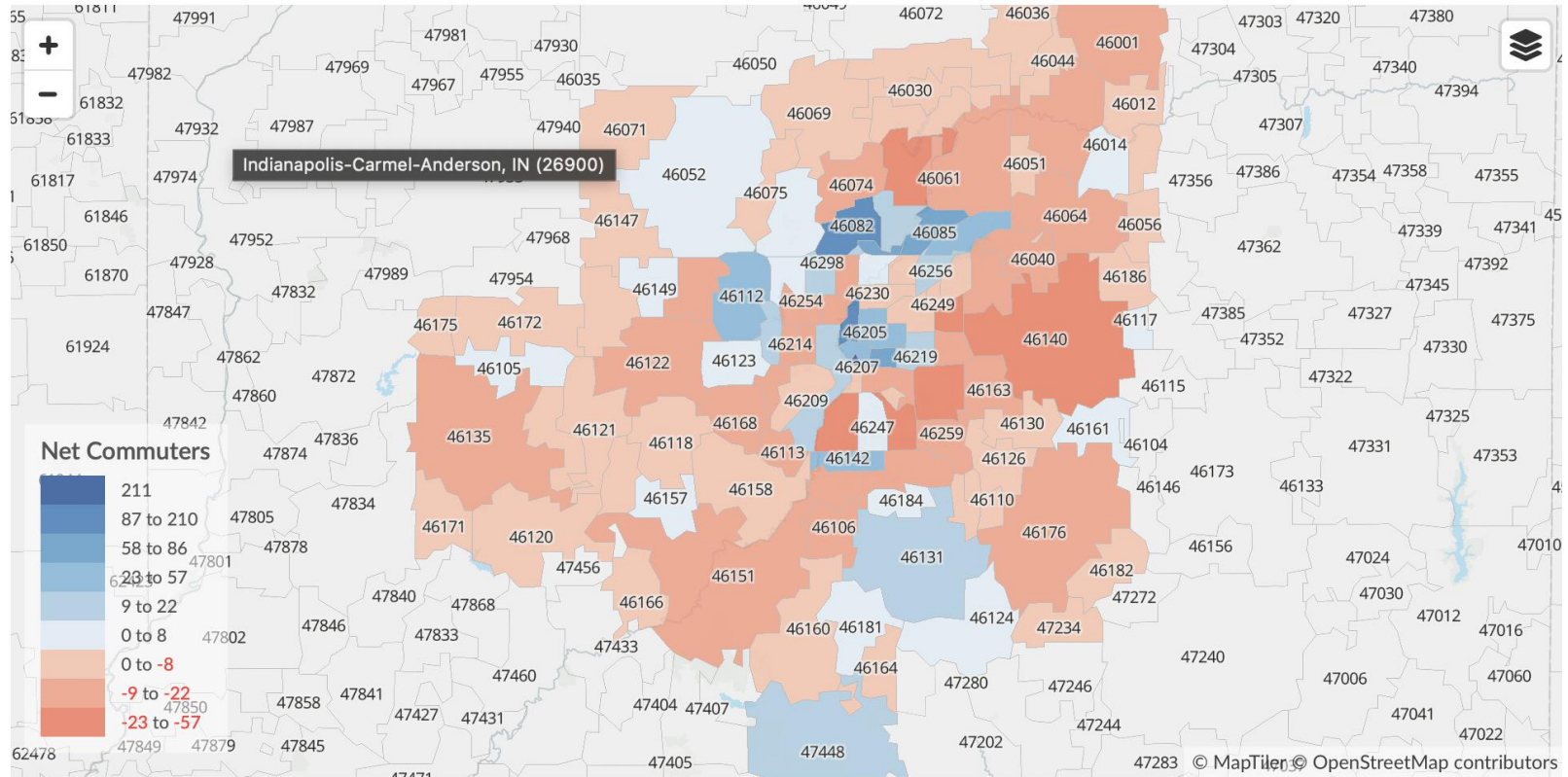
Child Care Professionals, Central Indiana

0% Past Growth (2018 - 2023)

-1% Projected Growth (2023 - 2028)



Commuting Patterns, Child Care Professionals



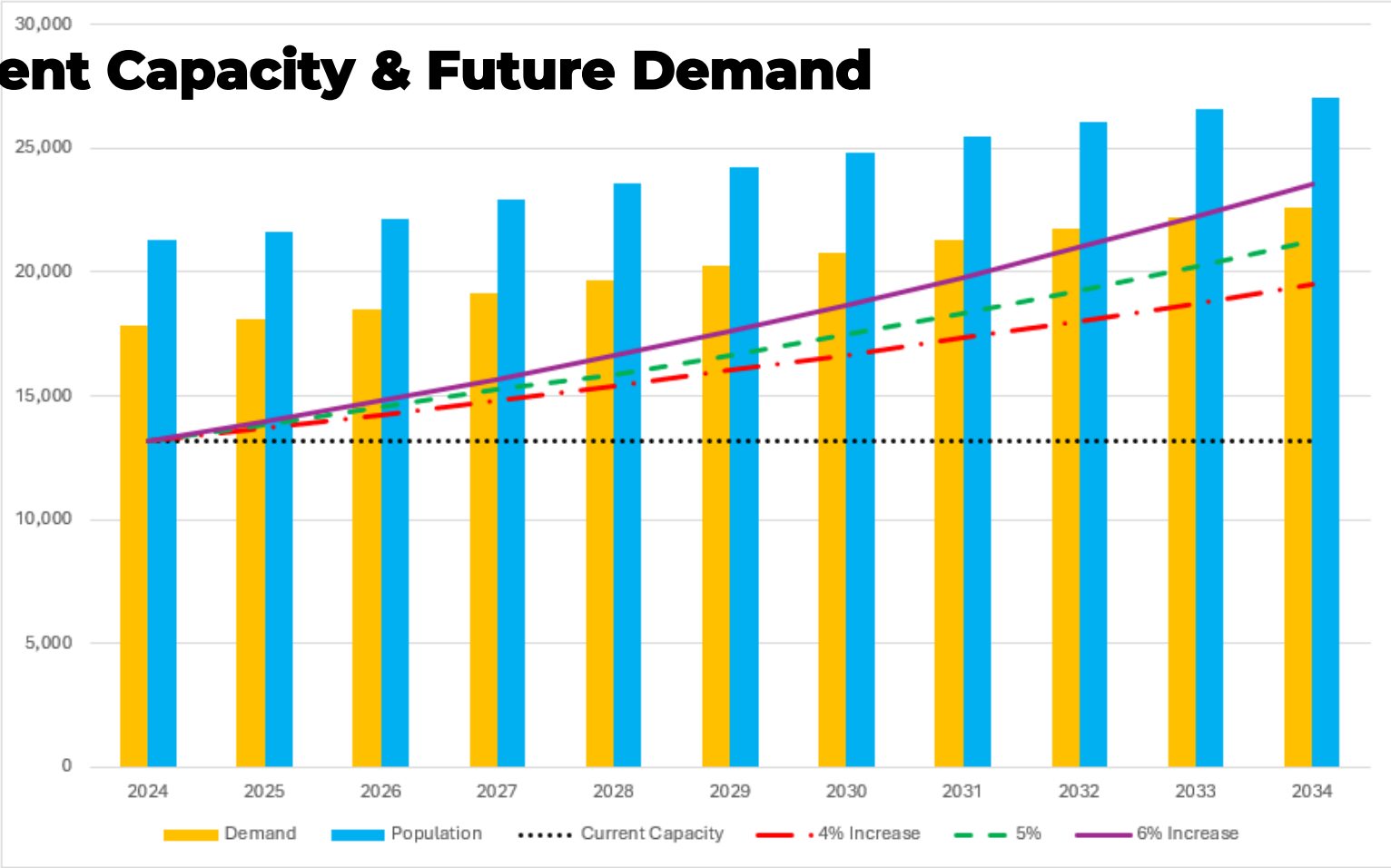
Source: Lightcast via Invest Hamilton County Q4 2024



Impact Analysis Review

Hamilton County Childcare Action & Investment Plan

Current Capacity & Future Demand



Current Capacity & Future Demand

	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Current Capacity	13,166	13,166	13,166	13,166	13,166	13,166	13,166	13,166	13,166	13,166	13,166
Demand	18,360	18,640	19,074	19,761	20,299	20,853	21,395	21,923	22,439	22,905	23,267
Population	21,314	21,639	22,143	22,940	23,565	24,208	24,838	25,451	26,049	26,591	27,011
Deficit, Status Quo	-5,194	-5,474	-5,908	-6,595	-7,133	-7,687	-8,229	-8,757	-9,273	-9,739	-10,101
Annual New Seats, 2034 Equilibrium	N/A	790	837	888	941	997	1,057	1,121	1,188	1,259	1,335

Updated Model (adjusted for Private Household Childcare Providers)

	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Current Capacity	13,166	13,166	13,166	13,166	13,166	13,166	13,166	13,166	13,166	13,166	13,166
Total Demand	18,360	18,640	19,074	19,761	20,299	20,853	21,395	21,923	22,439	22,905	23,267
Demand Met by Private Household Workers	550	557	570	591	607	624	640	655	671	685	696
Demand for Seats, All Other Options	17,810	18,083	18,504	19,170	19,692	20,229	20,755	21,268	21,768	22,220	22,571
Population	21,314	21,639	22,143	22,940	23,565	24,208	24,838	25,451	26,049	26,591	27,011
Deficit vs. Status Quo	-4,644	-4,917	-5,338	-6,004	-6,526	-7,063	-7,589	-8,102	-8,602	-9,054	-9,405

Updated Model (adjusted for Private Household Childcare Providers)

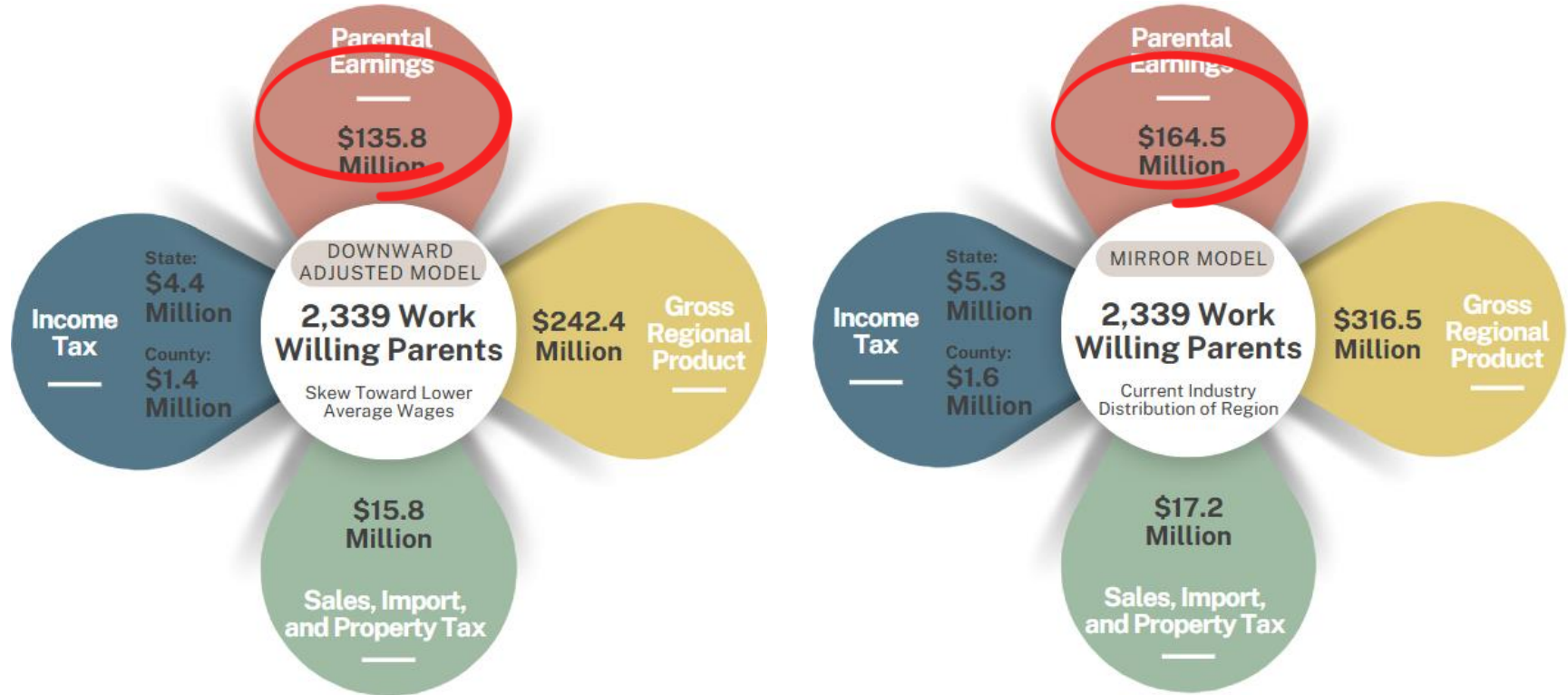
Table X: Annual Increases in Seats to Meet Demand (2024 through 2034)

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033
4% Increase	13,166	13,693	14,241	14,811	15,403	16,019	16,660	17,326	18,019	18,740	19,490
5% Increase	13,166	13,824	14,515	15,241	15,851	16,644	17,476	18,350	19,268	20,231	21,243
6% Increase	13,166	13,956	14,793	15,681	16,622	17,619	18,676	19,797	20,985	22,244	23,579

Table IX: Number of Seats to Meet Demand (2024 through 2034)

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033
4% Increase	0	527	548	570	593	616	641	667	693	721	750
5% Increase	0	658	691	726	610	793	833	874	918	964	1,011
6% Increase	0	790	837	887	941	997	1,057	1,120	1,188	1,259	1,335

Total Impact: Work Willing Parents Downward Adjusted vs. Mirror Models





Next Steps

Hamilton County Childcare Action & Investment Plan



Childcare Action and Investment Plan



Final Report!



Build the “Childcare Collaborative”

Questions?

Hamilton County Childcare Action & Investment Plan





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*Thank
you!*



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