



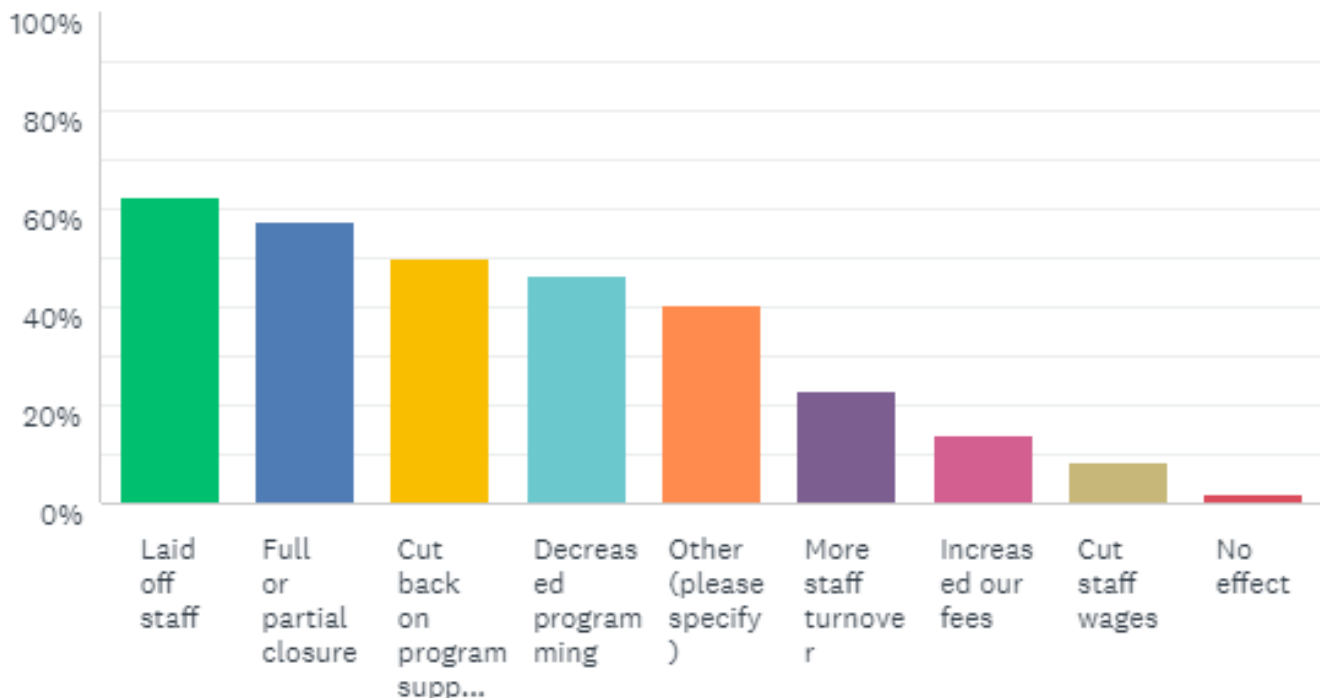
2020 Child Care Operator Survey Results Summary

In an effort to learn more about the challenges in the child care sector, Public Interest Alberta conducted our biennial survey of child care centres, day homes, and after-school care programs. In addition to overall conditions in the child care sector, the survey sought to gain insights into the impact of the COVID-19 pandemic on the sector, as well as understand the immediate interventions the government could make to ensure the sector recovers from the pandemic, and support a recovery for the province's economy.

Key Findings

1. The COVID-19 pandemic has negatively impacted the child care sector in many significant ways.

Almost all respondents (98.22%) identified several serious and detrimental impacts of the COVID-19 pandemic on their operations. 62.28% had to lay off staff, 57.65% experienced full or partial closure, 49.82% cut back on program supplies, 46.62% decreased programming, 22.78% experienced increased staff turnover, 14.23% increased their fees, and 8.54% cut their staff wages.

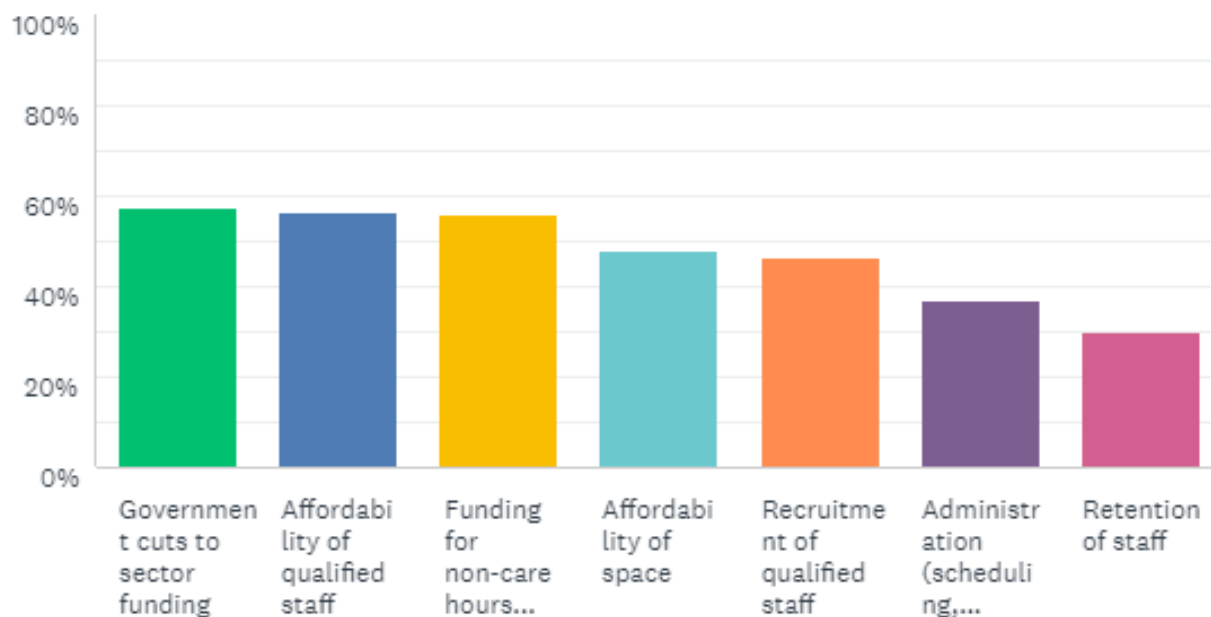


Other concerns which the respondents identified included, but are not limited to:

- Mental health strain on operators and staff
- Cutting staff hours
- Decreased enrollment
- Cutting nutrition programs
- Financial strain for personal protective equipment costs

“[We are] not being able to run the inclusive and cooperative centre that we had before we shut down. Our ties to the families and community have been severed and that is a loss. Our parents are no longer a big part of our programming and it feels very secluded.” - Survey Respondent

2. The child care sector has been deeply affected by the extensive cuts to funding which the provincial government has enacted over the last two budget cycles. The top concern for child care operators is government cuts to sector funding.



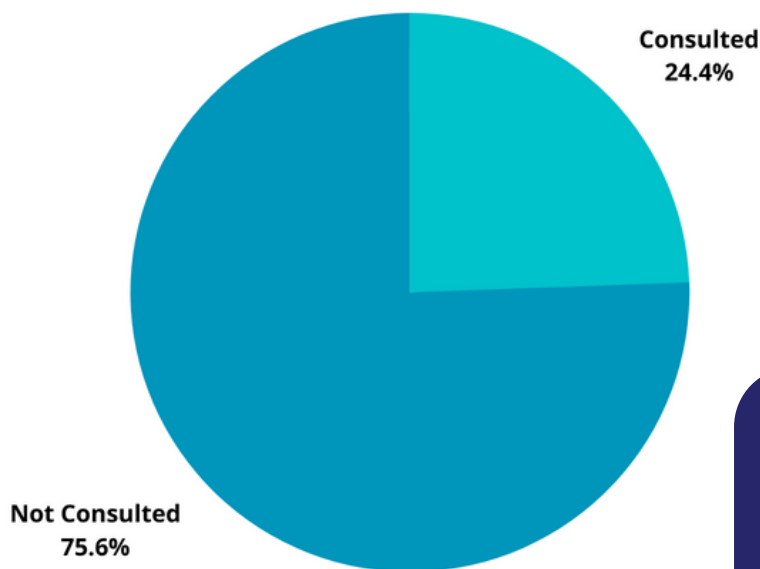
More than half of respondents identified government cuts to sector funding as a concern (57.30%). This was followed by affordability of qualified staff (56.56%), funding for non-care hours such as professional development, lesson planning, and documentation (55.87%), the affordability of rental space (48.04%), recruitment of qualified staff (46.62%), administrative tasks such as scheduling, supervision, setting policies, and budgeting (37.01%), and retention of staff (30.25%).

“We need an investment from the government that recognizes the importance of the early years, family needs, community options for licensed, safe, flexible, quality child care.” - Survey Respondent

3. Most operators were not consulted on major government changes in the sector.

One of the significant cuts the provincial government has made to the sector was the elimination of the Benefit Contribution Grant – a program that offsets the costs to child care operators of mandatory employer payroll contributions like the Canada Pension Plan, Employment Insurance, vacation pay, and statutory holiday pay – on April 1, 2020.

Three-quarters of respondents (75.57%) were not consulted on this change.



“We feel that child care is NOT a priority of the current government and educators suffer from low wages and being undervalued in our society.” - Survey Respondent

The top four effects to child care operators from the elimination of the Benefits Contribution Grant were::

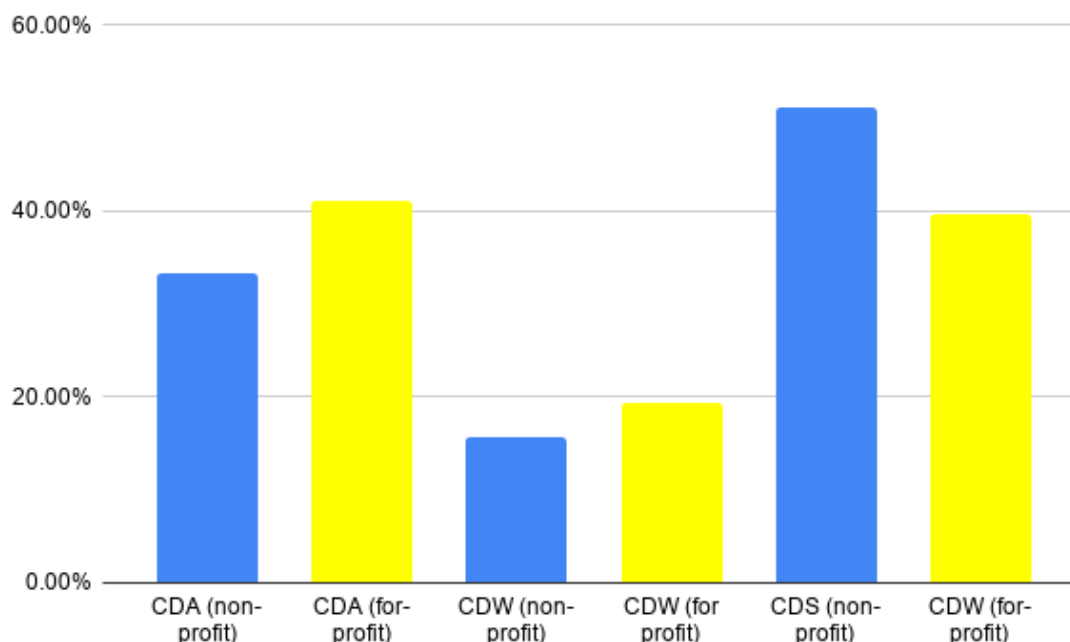
- 25.62% increased their fees
- 23.13% cut back on program supplies
- 13.17% decreased programming
- 12.10% laid off staff

4. Child care operators have a high proportion of staff with minimal training. Non-profit operators tend to have more qualified staff.

The total number of people employed in the participants' programs was 3,989 (pre-COVID numbers where indicated). Of those, more than one-third (36.27%) of workers employed by child care operators surveyed were trained to the minimal level of Child Development Assistant (CDA), which requires a 45-hour course.

Child Development Workers (CDW), who require a one-year certificate, made up the smallest proportion of the overall workforce at less than one in five (17.10%).

When comparing operator types, non-profit organizations had the highest percentage of staff with the top level of training. More than half (51.18%) of the non-profit workforce are Child Development Supervisors (CDS), who require a two-year diploma.



Staff qualification level	Non-profit and municipally-run centres	For-profit centres
Child Development Assistant	33.18%	41.06%
Child Development Worker	15.64%	19.35%
Child Development Supervisor	51.18%	39.60%

5. A high proportion of child care operators are able to offer limited professional development opportunities to their staff. Non-profit and municipally-run centres offer more extensive professional development, including significantly more paid time to attend workshops or conferences and to attend post-secondary education courses, while for-profit centres offer more on-site workshops and reading material to their staff.

Professional Development Opportunities	Non-profit and municipally-run centres	For-profit centres
Funding to attend workshops or conferences	62.34%	55.91%
On-site workshops	57.14%	66.35%
Reading material	57.14%	65.35%
Paid time to attend workshops or conferences	51.95%	37.80%
Post-secondary education courses	24.03%	19.69%
None of the above	9.74%	9.45%

6. The child care sector workforce is largely woman-dominated, with 79% of respondents indicating their front-line staff is 91 - 100% female, and 75.54% of respondents indicating that management is 91 - 100% female.

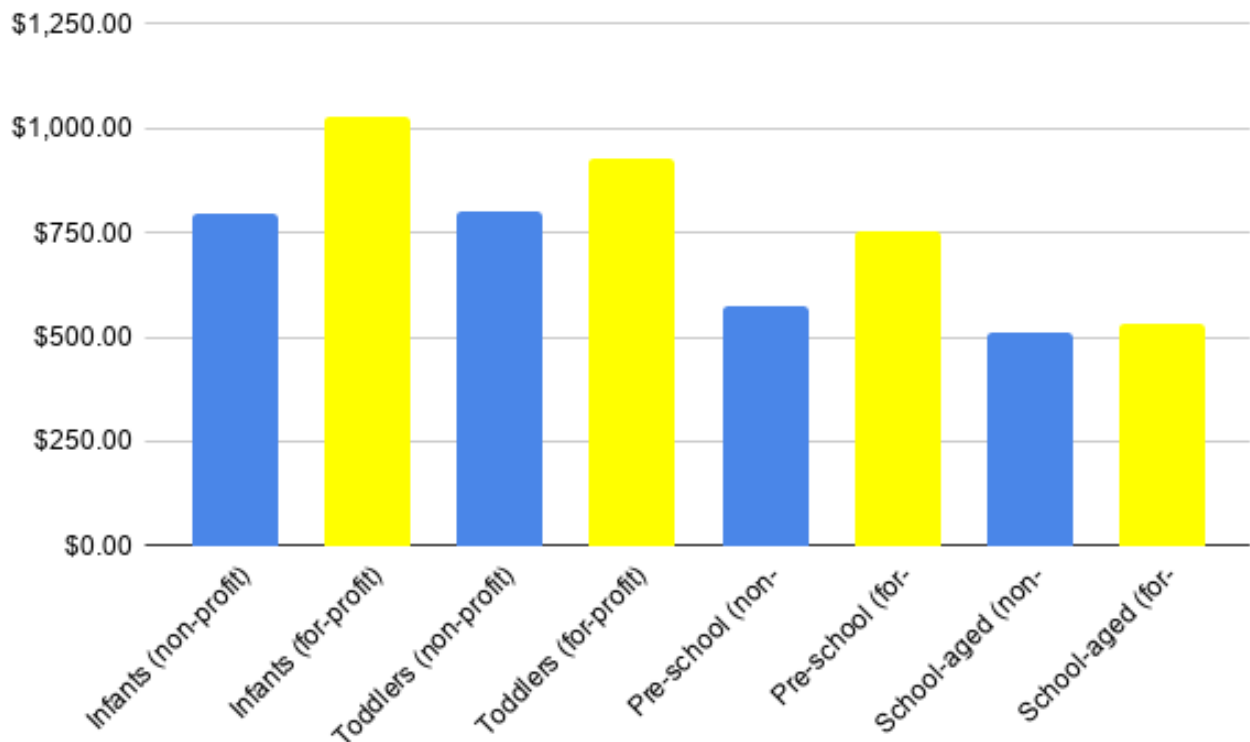
“If we want to bring back a strong economy there will be an increasingly big need for quality care....INVEST IN OUR FUTURE, invest in a predominantly female work force!” - Survey Respondent

7. Child care can be difficult to find for families with infants or children with complex needs due to limited availability.

Of all centres surveyed, just under half (48.04%) of respondents currently serve infants, about one-third (33.45%) serve children with disabilities, and only 14.60% of respondents currently serve children who have been expelled from other programs due to challenging behaviours.

8. On average, non-profit organizations reported lower fees for child care.

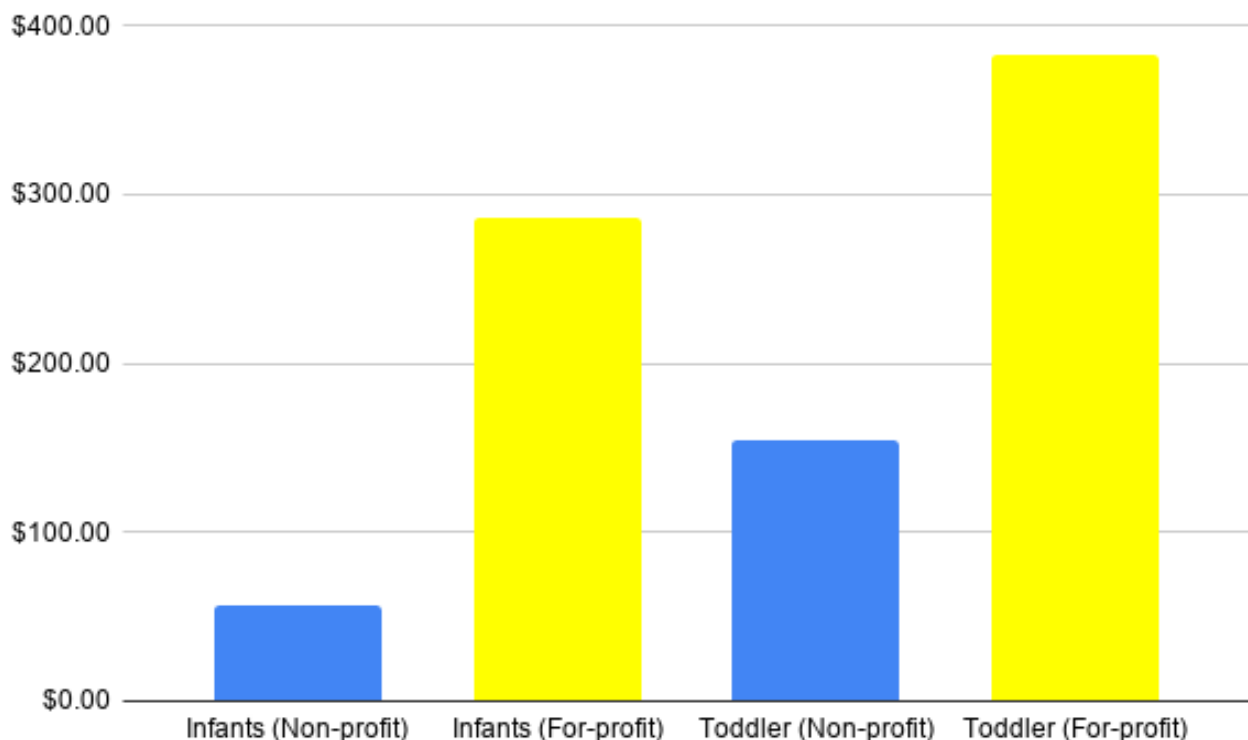
In all age ranges, non-profit centres reported, on average, lower fees than for-profit centres. The largest disparity between for-profit providers and non-profit providers was in child care for infants and pre-school-aged children. For infants, the average monthly cost for care in a for-profit centre was \$1026.70, while non-profits charged \$797.40 per month (22.3% less). For pre-school aged children, for-profit centres charge, on average, \$750.95 per month, while non-profit centres charge \$575.15 (23.4% less).



Monthly fee* for...	Non-profit and municipally-run centres	For-profit
Infants	\$797.40	\$1026.70
Toddlers	\$798.71	\$928.94
Pre-school aged children	\$575.15	\$750.95
School-aged children	\$508.00	\$529.08

*These are averages and vary based on program. When centres input daily fees, we calculated at 5 days per week, 4 weeks a month. When hourly rates were given, we calculated at 8 hours per day, 5 days per week, 4 weeks per month.

These large disparities mean that low-income families (combined income of \$49,999 and under) are paying significantly above their subsidy for care, especially for infants and toddlers. A low-income family, on average, would pay \$56.40 above full subsidy for infant care at a non-profit centre, and would pay about 5 times that (\$285.70) at a for-profit centre. For toddler care, a low-income family would pay, on average, \$154.71 a month at a non-profit centre, and about 2.5 times that at a for-profit centre (\$382.70).



9. Access to affordable, high-quality, and accessible child care is critical to Alberta's economy and especially impacts women's participation in the workforce. Government support for the child care sector fosters the economic recovery of the entire province.

Survey respondents indicated the following needs for additional funding from the government to support the recovery of the child care sector:

- 64.98% said wage top-ups
- 57.40% said support for recovering from partial or full closure due to COVID-19
- 53.07% said parent subsidies
- 50.90% said support for hiring additional cleaning staff
- 50.54% said additional personal protective equipment supplies
- 42.24% said professional development for staff
- 39.35% said facility renovations for new health and safety guidelines
- 38.82% said support to hire additional child care staff

Other suggestions included (but were not limited to):

- Operational funding/Rental help
- Re-institution of government grant programs which were cut, including the Early Learning and Child Care Pilot Project (the \$25-a-day program), and the Benefit Contribution Grant
- Funding for child or staff sick days
- Increased funding for inclusive supports for rural centres
- A cohesive national child care program

Overview of Participants

- There were 281 participants: 61 respondents were from Edmonton (21.71%), 57 were from Calgary (20.28%), 14 were from Red Deer (4.98%), 8 were from Sherwood Park (2.85%), 8 were from St. Albert (2.85%), 8 were from Airdrie (2.85%), 8 were from Cochrane (2.85%), 6 were from Fort McMurray (2.14%), 6 were from Medicine Hat (2.14%), 6 were from Okotoks (2.14%), and the rest (35.21%) were from smaller cities, towns, and rural areas across the province.
- Of those surveyed, 43.77% were not-for-profit, 43.77% were for-profit, privately held, 1.42% were for-profit, publicly traded, and 1.87% were municipally run.
- Of those surveyed, 67.26% operated centre-based child cares, 32.38% operated pre-schools, 7.12% operated regulated family day homes, and 2.85% operated unregulated day homes.
- 96.44% of centres that responded to the survey were licensed, while 3.56% were not licensed.

