

Crisis of Affordability

Action for Children's 2025 Central Ohio Child Care Provider Survey Report

Virtual Webinar | December 16, 2025

Hosted by Action for Children



WELCOME!

Action for Children





Dr. Katherine Glenn-Applegate,
*Director of Child Care Education and Initiatives
at Action for Children*

ABOUT ACTION FOR CHILDREN

Action for Children is the local Child Care Resource and Referral (CCR&R) agency for central Ohio, and is committed to assuring quality early learning experiences for all children. Our services focus on transforming the lives of children by supporting the everyday heroes who most influence our children's early growth; caregivers, educators, parents, and guardians.



A Child Care Resource and Referral (CCR&R) organization serves as a resource hub for families, child care professionals and communities. CCR&Rs increase access to high-quality, affordable child care by providing many different services depending on where an individual lives.



ABOUT ACTION FOR CHILDREN



- Action for Children serves Columbus and Franklin County, as well as Delaware, Fairfield, Licking, Madison, Pickaway, and Union counties.
- Some programs are also available in Knox, Marion, and Morrow counties.

CHILD CARE IS...

- The workforce behind the workforce.
- An essential infrastructure.
- Currently at risk in central Ohio.
- In need of support from businesses leaders, policymakers, advocates, philanthropists, and storytellers like you.



Tasha Booker
CEO at Action for Children

THE LANDSCAPE

Action for Children



2025 REPORT WRITERS



Dr. Joyce Chen,
*Professor of Economics in Women's,
Gender and Sexuality Studies at
The Ohio State University*



Dr. Katherine Glenn-Applegate,
*Director of Child Care Education
and Initiatives at Action for
Children*

Thank you to the MANY AFC staff and board members, child care professionals,
and reviewers who played a role in producing this report!

KEY TAKEAWAYS



Dr. Joyce Chen

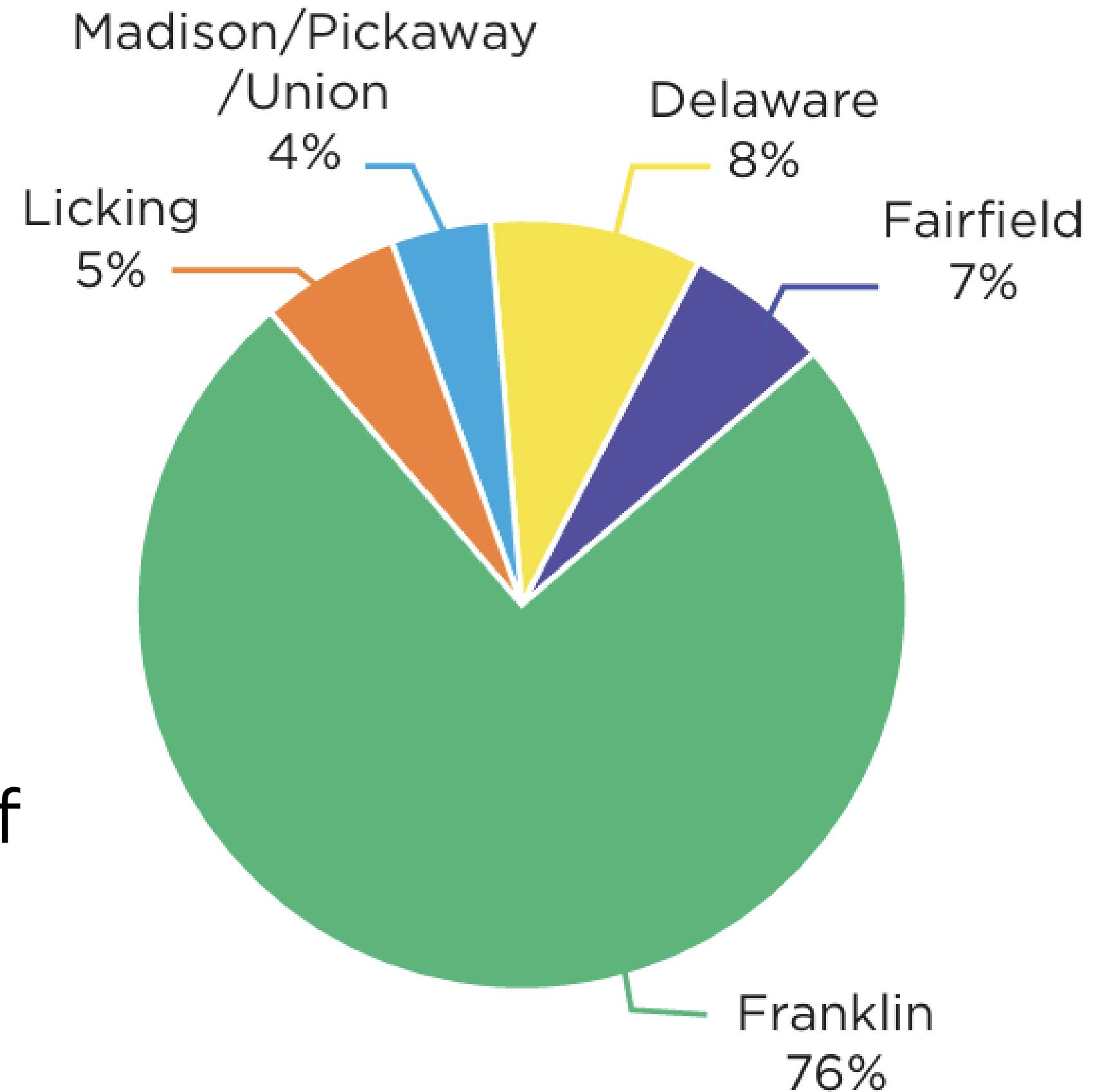
*Professor of Economics in Women's,
Gender and Sexuality Studies at
The Ohio State University*

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ABOUT THE REPORT

- Survey distributed to providers in SDA9 in August 2025
- 314 responses collected (196 centers, 118 family child care), 25.5% response rate
- Sample size is representative of all child care providers in central Ohio, with a margin of error of 5%



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PROVIDER CONFIDENCE

	Central Ohio	Delaware	Fairfield	Franklin	Licking	Madison/ Pickaway/ Union	Centers	FCCs
Unsure if will be open without additional public support in next 3 months	16%	12%	14%	19%	0%	0%	13%	21%
Unsure if will be open without additional public support in next 12 months	58%	32%	64%	64%	38%	14%	53%	67%

- After improving gradually over the previous four years, provider confidence has begun showing signs of weakness.
- 53% of centers and 67% of family child care providers are concerned about long-term financial viability.

REVENUE VS. EXPENSES

	Delaware	Fairfield	Franklin	Licking	Madison Pickaway Union	Centers	FCCs	Central Ohio
Monthly revenue not covering expenses	40%	55%	50%	25%	29%	41%	58%	47%

- The proportion of programs reporting monthly losses declined slightly from last year (55% to 47%).
- But any sector in which roughly half of businesses operate on a monthly loss is at risk. When that sector is child care, the workforce at large is threatened.

ENROLLMENT VS. CAPACITY

	Delaware	Fairfield	Franklin	Licking	Madison/ Pickaway/ Union/	Centers	FCCs	Central Ohio
Survey-Based Enrollment/Total Capacity	78%	74%	76%	85%	72%	77%	73%	77%

- Surveyed programs are enrolled at 77% of their total capacity, up from 66% in 2024.
- At full capacity, over 20,000 additional children could be enrolled in care, expanding the child care system in central Ohio by **over \$4.3 million dollars every week.**

STAFFING

	Central Ohio	Delaware	Fairfield	Franklin	Licking	Madison/ Pickaway/ Union
2025 centers hiring or have open positions	63%	65%	58%	65%	58%	44%

- 63% of surveyed child care centers want to hire, with the majority needing to re-hire for at least one position last year.
- Wages for child care workers in central Ohio top out around \$23/hour, compared to an average wage of \$33/hour in Ohio across all sectors

CHILD CARE COSTS

- Child care costs range from 8-26% of median household income, far above the 7% affordability threshold.
- For families with young children, these costs typically exceed housing costs.

	Lowest Median Cost	% of Avg. Income	Highest Median Cost	% of Avg Income	Weekly Median Household Income
Delaware	\$200	8.4%	\$350	14.7%	\$2,385
Fairfield	\$200	12.5%	\$350	21.9%	\$1,596
Franklin	\$200	14.6%	\$350	25.6%	\$1,367
Licking	\$180	11.9%	\$250	16.6%	\$1,510
Madison	\$180	12.1%	\$250	16.9%	\$1,482
Pickaway	\$150	11.5%	\$200	15.4%	\$1,300
Union	\$200	10.0%	\$350	17.4%	\$2,010

RATE CHANGES



Dr. Katherine Glenn-Applegate,
*Director of Child Care
Education and Initiatives
at Action for Children*

WHAT IS PUBLICLY FUNDED CHILD CARE?

PFCC is support from the Ohio Department of Children & Youth for the cost of child care

- To qualify for PFCC, a family must have a
 - (1) Income $\leq$ 142% of the federal poverty level, and
 - (2) Qualifying activity (e.g., work, school)
- The amount DCY pays child care programs depends on
 - (1) Provider SUTQ rating
 - (2) Provider type
 - (3) FT, PT, or hourly authorization
 - (4) County
 - (5) Child age

HOW DOES SUTQ RATING IMPACT PFCC?

Base Rate
for
Publicly
Funded
Child Care



Base + 10%



Base + 15%



Base + 25%

50% of 2024
Market Rate
Survey

CHANGES TO PROVIDERS’ PFCC RATES

Weekly Rates for FT Care in Category 2 Counties – Licking, Madison, Pickaway

	PREVIOUS				NEW (Effective 11/2/2025)			
	Centers & Type A FCCs		Type B FCCs		Centers		Type A & Type B FCCs	
	Base	Gold	Base	Gold	Base	Gold	Base	Gold
Infant	\$221.87	\$277.34	\$170.00	\$212.50	\$246.65	\$308.31	\$200.00	\$250.00
Toddler	\$200.00	\$250.00	\$165.00	\$206.25	\$220.00	\$275.00	\$190.00	\$237.50
Pre-School	\$175.00	\$218.75	\$155.00	\$193.75	\$190.00	\$237.50	\$180.00	\$225.00
School Age	\$126.00	\$157.50	\$139.21	\$174.01	\$130.00	\$162.50	\$160.00	\$200.00

Weekly Rates for FT Care in Category 3 Counties – Delaware, Fairfield, Franklin, Union

	PREVIOUS				NEW (Effective 11/2/2025)			
	Centers & Type A FCCs		Type B FCCs		Centers		Type A & Type B FCCs	
	Base	Gold	Base	Gold	Base	Gold	Base	Gold
Infant	\$295.00	\$368.75	\$200.00	\$250.00	\$325.00	\$406.25	\$225.00	\$281.25
Toddler	\$265.00	\$331.25	\$190.00	\$237.50	\$292.15	\$365.19	\$215.00	\$268.75
Pre-School	\$232.00	\$290.00	\$175.00	\$218.75	\$258.00	\$322.50	\$200.00	\$250.00
School Age	\$150.00	\$187.50	\$155.00	\$193.75	\$165.00	\$206.25	\$175.00	\$218.75

CHANGES TO PROVIDERS' PFCC RATES

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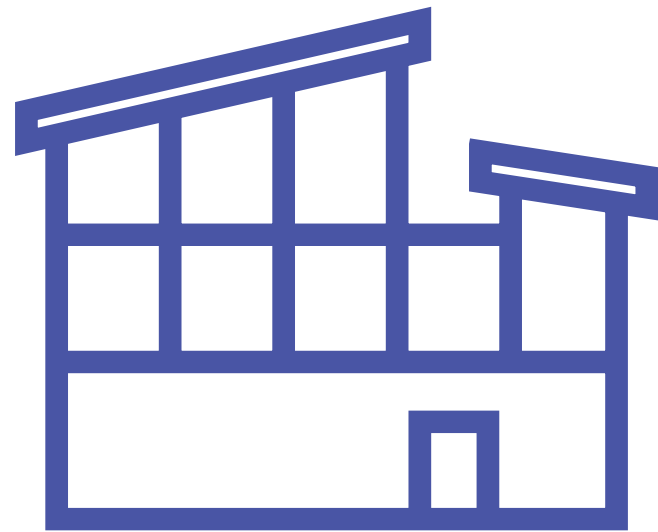
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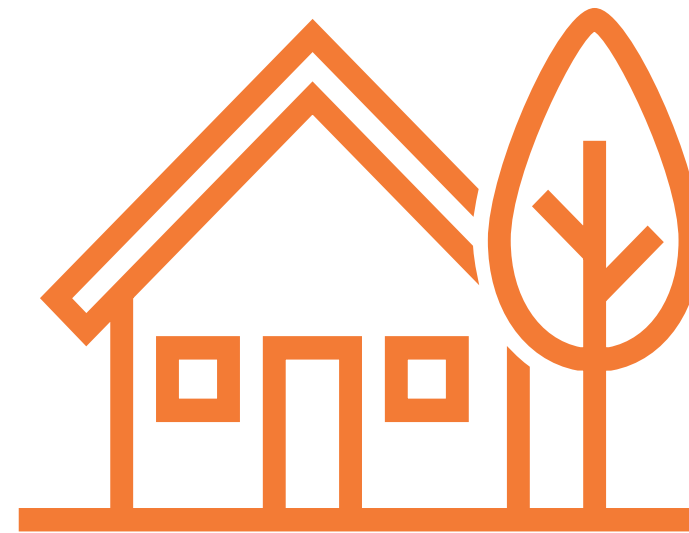
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School Age								

HOW DOES PROVIDER TYPE IMPACT PFCC?

Centers



Family Child Care Homes (FCCs)



Type B

- 1:7
- Max 7 children
- Max 3 < 2 yrs



Type A

- 1:7
- Max 14 children with +staff
- Max 6 < 2 yrs

CHANGES TO PROVIDERS' PFCC RATES

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Pre-School								
School Age								

IMPACT OF AUTHORIZATION ON PROVIDERS' PFCC RATE

A child can be authorized for

- Full-time
- Part-time
- Hourly care dependent on their grown-up(s) qualifying activities

For example, a preschooler in a Franklin county Bronze center

- FT: \$283.80/wk
- PT: \$187.00/wk
- Hourly: \$11/hr

Effective 11/16/2025, Ohio redefined weekly authorizations:

- FT: 25+ → 33± hrs
- PT: 7-24 → 10-32 hrs
- Hourly: <7 → <10 hrs

IMPACT OF AUTHORIZATION ON PROVIDERS' PFCC

A child can be authorized for
Full-time Part-time Hourly
care, dependent on their
grown-up(s) qualifying activities

E.g., weekly rates for a
preschooler in a Bronze-Rated
center in Franklin

- FT: \$283.80/wk
- PT: \$187.00/wk
- Hourly: \$11/hr

Effective 11/16/2025, Ohio redefined authorizations:

Full-Time:	25+ hrs	→	33+ hrs
Part-Time:	7-24 hrs	→	10-32 hrs
Hourly:	Less than 7 hrs	→	Less than 10 hrs

CHANGES TO PROVIDERS' PFCC RATES

Child care providers' PFCC Rate depends on...

(1) Provider SUTQ rating

(2) Provider type

(3) FT, PT, or hourly
authorization

(4) County

(5) Child age

...and more.

FINANCIAL VIABILITY



Dr. Joyce Chen

*Professor of Economics in Women's,
Gender and Sexuality Studies at
The Ohio State University*

Action for Children



PFCC REVENUE CALCULATORS (FCCS + CENTERS)

PFCC Weekly Revenue Calculator, Type A FCC

Choose your PFCC category and Step Up To Quality level, then enter how many children you have in each age group at full time.

PFCC Rate Category

Category 2 (Programs in Delaware, Fairfield, Franklin, or Union Counties) ▾

Step Up To Quality level

Gold ▾

Age group	Children enrolled Full-time	Previous rate Per child per week	New rate Per child per week	Previous revenue Per week	New revenue Per week	Change Per week
Infant	4	\$277.34	\$250.00	\$1,109.36	\$1,000.00	-\$109.36
Toddler	6	\$250.00	\$237.50	\$1,500.00	\$1,425.00	-\$75.00
Preschool	3	\$218.75	\$225.00	\$656.25	\$675.00	\$18.75
School-Age	1	\$157.50	\$200.00	\$157.50	\$200.00	\$42.50
Total	14			\$3,423.11	\$3,300.00	-\$123.11

Note: If a rate is not defined for a particular age group, category, and SUTQ level combination, that row will show "N/A" and will not be included in the totals.

CALCULATE

- Try out our new [Weekly Revenue Calculator](#) to help understand changes in reimbursement rates
- Simply enter your cost category, SUTQ rating, and enrollment numbers by age group

FAMILY CHILD CARE BUDGET FORECASTING TOOL

AutoSave Child-Care-Budget-Forecasting-Cost-Estimator-tool_FCCs

Home Insert Draw Page Layout Formulas Data Review View Automate Comments Share

Clipboard Font Alignment Number Conditional Formatting Format as Table Cells Editing Sensitivity Add-ins Copilot

F1 Enter Data in Yellow Cells:

	A	B	C	D	E	F	G	H	I	J	K
1		Total Household Expense	Schedule C Business Income	Cash Business Profit		Enter Data in Yellow Cells:					
2	Income										
3	Contributions and Grants		\$ -	\$ -		Bad Debt Write-Offs as % of Tuition Revenue:			5%		
4	Tuition		\$ 35,625.00	\$ 35,625.00							
5	Fees		\$ 500.00	\$ 500.00							
6	Food Program Income		\$ 5,000.00	\$ 5,000.00							
7	Total Income		\$ 41,125.00	\$ 41,125.00							
9	Expenses (Per IRS Schedule C)										
10	COST OF GOOD SOLD										
11	Food		\$ 4,500.00	\$ 4,500.00							
12	Educational Supplies		\$ 300.00	\$ 300.00							
13	TOTAL COST OF GOODS SOLD		\$ 4,800.00	\$ 4,800.00							
15	OTHER EXPENSES										
16	Advertising		\$ 400.00	\$ 400.00							
17	Car and Truck Expenses		\$ 500.00	\$ 500.00							
18	Contract Labor		\$ 100.00	\$ 100.00							
19	Business Liability Insurance		\$ 300.00	\$ 300.00							
20	Interest Expense		\$ 50.00	\$ 50.00							
21	Legal & Accounting Services		\$ 200.00	\$ 200.00							
22	Office Supplies		\$ 175.00	\$ 175.00							
23	Retirement Contributions		\$ 400.00	\$ 400.00							
24	Equipment Lease & Maintenance		\$ -	\$ -							
25	Bad Debt		\$ 1,781.25	\$ 1,781.25							
26	Dues & Memberships		\$ 100.00	\$ 100.00							
27	Professional Development		\$ 100.00	\$ 100.00							
28	Travel/Meals		\$ 100.00	\$ 100.00							
29	Depreciation		\$ 500.00	\$ -							
30	Taxes, Licenses & Permits		\$ 100.00	\$ 100.00							
31	Other Business Expenses		\$ 200.00	\$ 200.00							
32	Rent/Mortgage*	\$ 8,000.00	\$ 2,819.63	\$ -							
33	Property Tax*	\$ 1,500.00	\$ 528.68	\$ -							
34	Cleaning Supplies*	\$ 400.00	\$ 140.98	\$ 140.98							
35	Maintenance & Repair*	\$ 500.00	\$ 176.23	\$ 176.23							
36	Utilities*	\$ 2,000.00	\$ 704.91	\$ -							
37	Homeowner's Insurance*	\$ 1,500.00	\$ 528.68	\$ -							
38	Phone*	\$ 1,200.00	\$ 422.95	\$ -							
39	TOTAL OTHER EXPENSES		\$ 10,328.31	\$ 4,823.46							
41	Total Expenses		\$ 15,128.31	\$ 9,623.46							
43	Profit/Loss		\$ 25,996.69	\$ 31,501.54							
45	*Calculated based upon Time-Space Percentages		35%								

Child Tuition Data Monthly Enrollment Forecast Profit & Loss Time-Space Percentage

Ready Accessibility: Investigate 100%

- Add your projected revenue along with business expenses into our [Family Child Care budget forecasting tool](#)
- Identify cost savings and assess viability



NEXT STEPS



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1 Speak Up

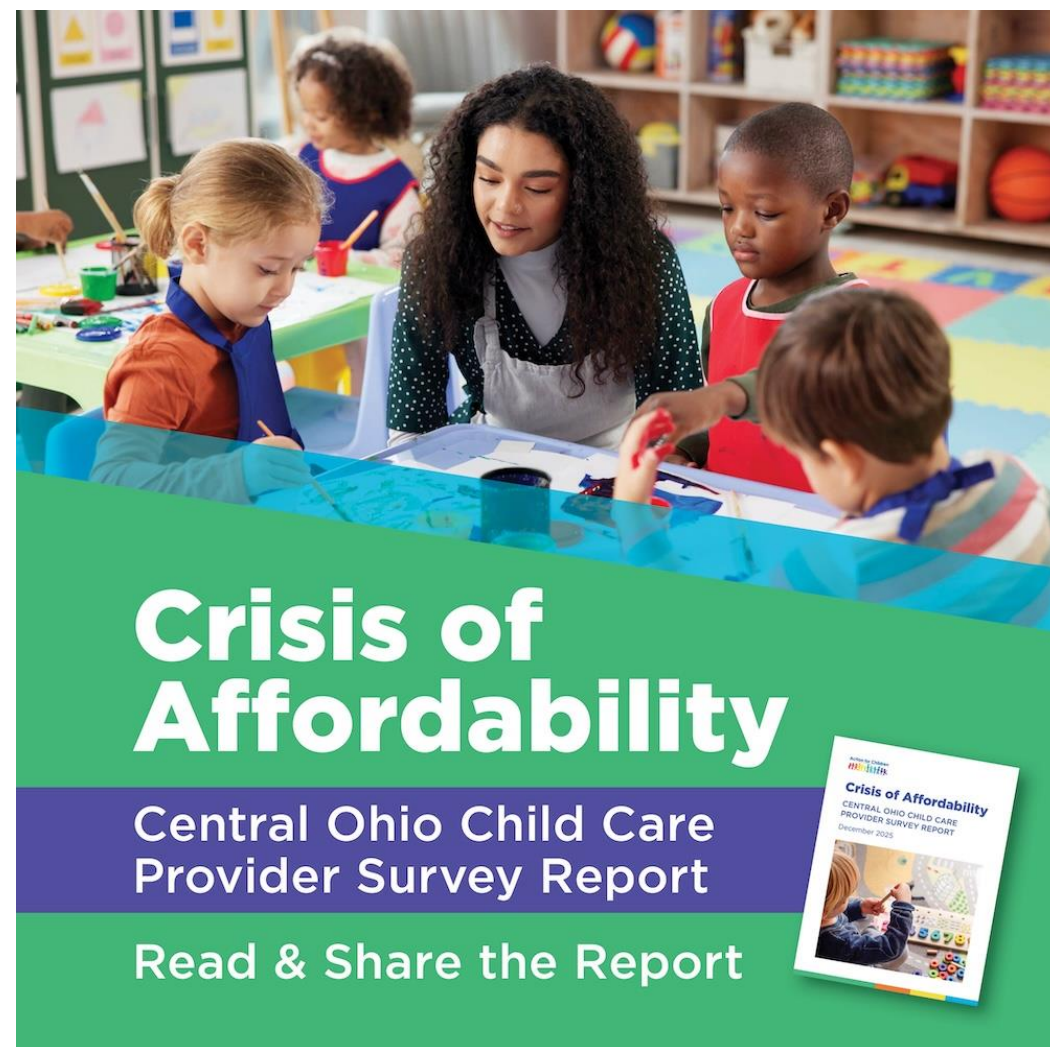
2 Fund Holistic Supports

3 Help Families Pay for Care

4 Empower ECE Professionals

Q + A

*You can continue to support
Action for Children's advocacy efforts!*



- Read + share this report (actionforchildren.org/cocccps)
- Start conversations in your networks + communities
- Amplify the voices of providers and families