Georgia's Child Care Landscape

Challenges and Opportunities for Building Quality Spaces for Young Children

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Introduction

Not unlike other states, Georgia is a place of commonalities and contrasts. Post-pandemic data from the US Census Bureau and Economic Innovation Group (EIG) indicate that it is among the fastest growing and most economically dynamic states nationally. But while growth and economic activity boom in some regions, especially the Atlanta metro area and coastal Georgia, some regions of the state continue to struggle economically, to retain families and communities, and to escape from historic systems built on racial exclusion. Such trends and geographic differences underscore a changing political landscape that has clearly solidified Georgia as a swing state in national electoral politics.

Georgia's population is also among the youngest nationally, a change driven in part by American demographic shifts toward Sun Belt cities that accelerated after 2020. Despite demographic shifts, the Annie E. Casey Foundation's (Casey Foundation) 2023 Kids Count Data book ranked Georgia 37th of all states nationally in a broad review of indicators on child and family wellbeing. Measures of child poverty, parental employment, early childhood and preschool enrollment, and healthy birthweights of babies all worsened during the height of the Covid-19 pandemic.

The affordability, supply, and quality of early care and education is a well understood determinant of poverty alleviation and social equity. However, recent estimates indicate Georgia families pay an average of nearly $10,000 per year for a child to attend a licensed child care program, and costs grow exponentially for the youngest children and for families with multiple children under age five. Even for parents that can afford child care, demand outpaces supply. The Atlanta metro area, for example, only has child care capacity for two-thirds of the children who live there. Without continuation of federal support that kept many child care businesses afloat as enrollment plummeted during the pandemic, the Century Foundation has estimated that 944 child care programs with the capacity to serve nearly 82,000 young children could close in coming years due to financial and operating challenges.

Casey Foundation awarded a grant to the Low Income Investment Fund (LIIF) in 2023 to review and report back on the ways child and family wellbeing in Georgia intersect with the health and vibrancy of its child care market. LIIF has spent the last year conducting research, interviewing and engaging with key stakeholders, and traveling across diverse regions of the state to assess the affordability, quality, and availability of child care and the facilities the providers operate in across the state. Through partnerships and support from the Georgia Early Education Alliance for Ready Students (GEEARS) and the Professional Family Child Care Alliance of Georgia (PFCCAG), as well as outreach to a variety of unusual informants, LIIF gained a window into existing, strong work being done to support and advance the child care sector and to uncover gaps where additional focus and investment may be needed to increase and improve quality of supply.

Affordability and supply challenges in the state are driven by common, well-documented challenges of operating and financing child care programs, but also a lack of coordination across public agencies in reviewing and improving often distinct regulations and policies that influence the abilities of child care programs to expand or improve quality offer their own challenges. This study focuses on many of those less obvious challenges facing the child care sector with key findings and recommendations on the needs, barriers, and gaps in Georgia, through the lens of providers, government officials, and other child care actors or partners.

Findings are reflected in the following themes.

- Providers have a need to upgrade or renovate indoor and outdoor facilities to meet their needs and the needs of the children but lack funding to do so.
- When attempting to upgrade or open new facilities, providers, especially family child care providers, find local licensing and permitting processes confusing and difficult to navigate.
- Local government officials understand that their communities need child care and are underserved but lack the expertise or knowledge about their role in advancing and expanding child care.
- Economic development efforts, which are exploding in some areas of the state, have not taken into account the future child care needs of burgeoning communities.
- Providers see local economic development efforts and growth as opportunities to advance their child care business but lack funding or support to expand.

Methodology and Data Collection

This report involved a two-phase data collection and research process to provide a comprehensive approach to assessing challenges and opportunities in Georgia's child care sector. First, with the support of the Annie E. Casey Foundation and critical local partners – notably GEEARS and PFCCAG – LIIF sought a multitude of perspectives through interviews and focus groups with child care providers, government officials, and other actors and partners that influence or are affected by child care supply in some way. Focus groups were conducted with 30 family child care providers at the PFCCAG annual conference in April 2023. LIIF presented information and led a discussion with mayors and city managers from 13 metro areas at the Georgia Municipal Association (GMA) annual conference in June, and with various community development and city officials at both the Georgia Initiative for Community Housing (GICH) and GMA Youth and Children Advisory Committee conferences in October and November 2023.

Beyond focus groups, LIIF also sought more detailed perspectives through individual interviews with key stakeholders. In total, 47 interviews were conducted with representatives from child care, education, housing, planning, community and economic development, and other relevant sectors. A full list of interview and other participants is included in Appendix A. Data gathered during interviews and focus groups were later synthesized to find common themes and threads between the differing perspectives as noted above and further explored in the following sections.

In addition to qualitative data collection, LIIF also examined child care supply and important economic indicators in the thirteen largest municipal areas outside of Atlanta as a complement to its meeting with the mayors and city managers of these regions. This research culminated in mapping the availability of child care (See Appendix B) in the context of common measures of economic wellbeing to formulate a high-level framework for understanding potential future interventions for supporting child care providers and families in these thirteen regions.

Trends and themes of stakeholder interviews and other qualitative data collection are discussed in the first section, followed by an overview of spatial analysis of quantitative data, and discussion of a framework for further exploration. The report closes with a detailed recommendations section that builds on challenges and opportunities identified during data collection and analysis.

Trends and Themes from Interviews and Focus Groups

This section includes a discussion of trends and themes gathered during various qualitative data collection over the past year and is organized in three core buckets: (1) Financing barriers to facility enhancement and improvement, (2) Regulatory burdens facing child care providers, and (3) The critical but untapped role of local government.

Financing Barriers to Facility Enhancement and Improvement

"It's just another expense, everything is so expensive."

Through interviews and focus groups, child care providers conveyed clear needs and ideas for improving the physical conditions of their spaces but often discussed limited financial resources as the most overt barrier to doing so. Financial constraints for infrastructure improvements or expansion projects are one of the defining, yet often overlooked, challenges of the national child care sector. No dedicated federal funding exists for child care facilities, and most states mirror their own investments in child care after requirements of the federal Child Care and Development Block Grant (CCDBG), which prohibits resources from being used for major construction or acquisition of space. Restrictions on allowed use of public funds, paired with low overall margins in the child care sector, making borrowing difficult, artificially constrain expansion and improvement projects many child care providers are interested in taking on. For example, between 2016 and 2020, just 1% of Small Business Administration (SBA) loans went to child care businesses.

Child care programs of all types in Georgia noted a variety of upgrades they desired, including paint, kitchen, classroom configuration, as well as health and safety upgrades. Additionally, several expressed a desire to expand to serve more children but a lack of capital to do so. For example, one interviewed center director noted that her program was the only licensed option in her town. Because of ongoing population and economic growth, she had already identified a new building to open a new center but had no funding to make it happen. This same provider discussed the role of classroom size in quality ratings. She expressed frustration that with her current space she would not be able to improve her quality rating due to the size of the classrooms. Yet with no public funding or affordable debt, and no way to expand, she will continue to provide care for the children in her community in her current building. Another provider toured the team through the entire three-building facility and noted upgrades she wanted to make in almost every room - the kitchen appliances, the floors, paint, furniture, and bathrooms.

Home-based providers, in particular, face unique challenges as their space acts as both a child care program and a home for their family. In other words, financial constraints simultaneously threaten both their careers and homes. Many discussed sacrifices they make to their living spaces necessary to provide high-quality child care space, a source of both burnout and financial strain. In focus groups with family child care providers LIIF conducted at the PFCCAG annual conference, multiple participants revealed hopes for resolving these challenges and better segmenting their personal living spaces from the areas of their homes where they serve children. Project ideas ranged from the very small, like rerouting parent pick up and drop off to a back door to improve safety and comfort for children, to much larger-scale projects that would involve finishing a garage or basement to move primary child care activities out of living rooms and into their own designated spaces within homes. According to one participant of the Spanish-speaking focus group, though, the cost to just add a bathroom to her garage space would exceed $10,000 – a cost far out of reach in her current financial situation.

Outdoor play-spaces are also a vital part of a quality child care facility. Similar assessments conducted across the country by the LIIF team have demonstrated the lack of quality outdoor space as a common issue. As with other upgrades, money is a barrier to improving outdoor spaces. Providers recognize this need, but in addition to lack of funds, lack the expertise in designing quality outdoor space to both meet the needs of young children, to consider access to nature-based play, and to address the effects of climate change. Almost across the board providers talked about the need to upgrade the outdoor space to meet the needs of their program. Commonly noted were fencing, landscaping, and equipment.

At this child care facility in Lagrange, Georgia, the director and owner expressed an interest in upgrading outdoor space but was concerned about the financial capacity of the program to do so.

For example, one provider who served children 0 to 5 with multiple homes connected to each other, noted the need for better equipment, better ground cover, and varying areas to provide all children with a more robust quality experience. Another center-based provider had just upgraded her outdoor space, but already was having challenges with the mulch and the equipment. She said, “I spend [on rubber mulching] about $1200 every six months to maintain the requirement [from DECAL].” The team asked one provider whether she would want to upgrade her outdoor space, which was very sparsely furnished, with a metal climbing structure and a few tricycles. “Oh yes” she said, “I just don’t know how I would pay for it. But there really isn’t too much for them to do out there.” Another provider told us “My playground was just filled with dirt with bugs and spiders, so I went to Home Depot and got all the turf grass... but when it rains it holds water... and from the sun it has become like dry rot, so I called a professional and it would be like $18,000 to get it done.” Beyond basic upgrades, providers need support to integrate the outdoors into the curriculum and to learn different approaches to addressing the impacts of climate change in the design of upgraded spaces.

Providers intimately understand their facilities needs and have some ideas for improving quality of their spaces, but thin margins and highly restricted state funding for quality improvement that mostly limits uses of funds to operations, curriculum, and minor furnishing prevents many from responding to needs and consulting with experts who could support and add to their ideas Despite affecting quality ratings and resulting reimbursement rates, Georgia’s Quality Rated funds cannot be used for infrastructure.

Although these types of upgrades are critical to the experiences of the children and the people who care for them, daily the people caring for Georgia's children make do with substandard facilities, frequently due to lack of funding.

Regulatory Burdens Facing Child Care Providers

"I wish I could add on... but you would have to go through a whole process..."

Even if child care providers are able to finance facilities improvement they still face barriers. When embarking on a project they must navigate confusing, often burdensome regulatory barriers to upgrading, expanding, or opening new programs. From licensing to local permits to zoning issues, the process for addressing expansion of child care is complex at best. At worst these processes stymie Georgia in expanding access to care.

As is common across states, Georgia licensing requires multiple steps including an initial screening process through the state agency, DECAL, and criminal background checks on every person who is caring for children. The safety measures required for licensing play an important role in protecting children, but can make the initial process difficult. However, beyond licensing, local rules and regulations can play a significant role in the ability to address facilities needs or to open a new child care business.

Local jurisdictions have the ability to set their own fees, permitting, zoning codes, and other policies that govern local businesses, including child care. As a result, these regulations vary across municipalities and can compound an already expensive and extensive process. These regulations vary so dramatically that one provider indicated she moved just across county lines to face lower fees and a faster approval process. "I literally moved just so I didn't have to try and open in [this] county because everyone knows they are too hard." On the flip side another provider didn't realize regulations would change when she moved to a new county. Unprepared for the new set of rules, she was significantly delayed in reopening. Another home-based provider indicated that it took her eighteen months to open her business because each time she went to her municipality they gave her a new form to fill out and oftentimes when she returned with that form, she was told her she had the wrong form and staff gave her a different one. Another provider said that she was forced to start driving for Uber to support herself because the process had taken so long. Yet another described being so fed up that she sat at city hall until the mayor came in. She then enlisted the mayor to help her figure out the process. In fact, many providers stated that moving counties was necessary, some stating that they had moved to up to three counties during their time as providers – often due to significant barriers presented by the county in which they had been residing.

Homeowner Associations (HOAs) and landlords were two additional factors that providers indicated influenced their location decision. In Georgia, both HOAs and landlords wield the power to deny opening to a home-based child care. Therefore, without local or state policy to protect the child care provider, operating in a rental or in home with an HOA can prove challenging. One provider stated that when looking for a new property for his child care he made sure there was no homeowners association and that his neighbors were distanced, hoping it would allow him to reside and operate without needing to change locations again. Likewise, renters face difficulties with landlords. Within the focus groups, only two providers identified as renters. Many of the homeowners expressed the need to own their own home due to the fact that home ownership provides security from eviction and conflicts with landlords.

Yet, homeownership can present further financial barriers that make it unattainable for child care providers. Like many homeowners, providers hold mortgages and sometimes second mortgages or home equity lines of credit along that combine with other household expenses like homeowners insurance and repair costs. Unlike other homeowners, however, child care providers often have business insurance and special infrastructure needs that further escalate expenses that both add to the cost of providing care and put many home based providers in a precarious financial situation.

While regulations play a significant role, lack of community understanding can also inhibit child care from operating in residential neighborhoods. One provider said she moved specifically because she was having problems with her neighbors. This provider stated that their neighbors were constantly calling the police to file a noise complaint against them, after dealing with repeated complaints, the provider decided to move. However, moving proved to have its own issues as the provider then had to restart the licensing process and conform to the regulations set out by her new county.

As stated in the previous section, providers often face financial obstacles when wanting to upgrade their homes or center. Frequently these upgrades are required for attaining licensure or to fulfill regulations set out by the county and/or the Department of Early Care and Learning. For example, regulations that require home-based providers to install a sprinkler system to obtain a license add expense, time, and fail to recognize the unique space in which they operate. LIIF heard from providers who noted they paid upwards of $8,000 for their sprinkler system before they were able to attain a license. Providers also stated that the regulations among departments were often contradictory. For example, one provider said that the regulations set out by Bright from the Start, Georgia's Department of Early Care and Learning, require multiple locks on doors, whereas the Fire Department states that multiple locks are a fire-safety issue. These types of contradictory regulations can be addressed at the state level, as some states have done.

Regulations can also create barriers to upgrading homes in a timely fashion. Multiple providers cited a regulation that prohibits them from operating during construction, thus creating a paradoxical conundrum—to either continue to operate, despite potential fallout from not attending to the needed upgrade, or to stop one's operation to allow construction, creating a loss of income.

Advocates Perspectives

LIIF also interviewed representatives from child care associations and advocates to understand their perspective. Like providers, they identified local planning issues, funding challenges, and knowledge of facilities. While advocates acknowledge the vital role facilities play in assuring high quality care, they have traditionally focused on equally important issues including wages and overall funding, leaving the funding of facilities out of the picture and in the hands of individual providers.

The Critical but Untapped Role of Local Government in Improving Georgia's Child Care Outlook

Perhaps the most commonly shared opinion among child care advocates, individual businesses, and government staff was the importance of local officials in responding to child care supply and affordability challenges. However, despite this acknowledgement, the many local government officials LIIF engaged throughout report development conveyed a lack of understanding of their own role in helping to resolve financing and regulatory challenges.

Particularly for many of the issues cited in the two sections above, local governments in Georgia are often the primary reviewer and determinant of a child care business' ability to operate, expand, or improve conditions. The state's Department of Early Care and Learning (DECAL) manages child care licensing review and sets policy surrounding the state's child care subsidy program, but providers tended to express relative confidence in DECAL's policies and willingness to make changes when specific licensing or programmatic regulations have been identified as big barriers to improvement in the past. Generally, state involvement in child care was perceived by those interviewed, in particular the advocates, as something mostly held back by a lack of resources and political will. Solutions to challenges are generally known, and ongoing policy advocacy to state legislators continues in an effort to further expand large public investments in the child care sector.

When it came to local government, though, an ability to simply articulate and identify the challenges providers face in expanding or improving conditions was often difficult for those engaged in interviews and focus groups. Many providers spoke of difficulties navigating local land use policies or identifying suitable spaces to operate from, but understanding of local development, permitting, and policy processes often stopped at personal experience. Compared to state policy, where the child care sector is generally well-organized and individual providers are often able to clearly articulate changes they would like to see in legislation or funding priorities, local policy landscapes tended to be a black box.

To understand how local officials saw themselves as supporting or advancing child care, LIIF met with mayors of thirteen large cities (outside of Atlanta) at a regular meeting of the Hub Cities Initiative of the Georgia Municipal Association. The cities represent many of the various regions of the state and different economic bases and conditions. Additionally, LIIF was able to present at the Georgia Initiatives for Community Housing Annual Conference and hear from local officials, local CDFIs and other community members during the presentation.

During the GMA Hub Cities meeting, LIIF asked the attendees to indicate agreement on a scale of one to five surrounding each of the following statements:

- Supply of child care is a major challenge in my city.
- I feel like my city has a good understanding of local supply and demand of child care.
- I am concerned about the way future growth and development might affect the need for child care in my city.
- My city has recently made a policy change or created a program focused on expanding access to child care.

All attendees indicated that supply was a major challenge, yet they did not feel their city had a good understanding of local supply and demand. While there was more variation in response to the future growth and development question, virtually none of the cities had made a policy change or created a program focused on expanding access. The responses to the growth and development question reflected current economic activity in their region – for example in southwest Georgia, the concern was there wasn't enough development while the Mayor of Savannah said, "We're on fire with jobs and housing, but we don't know what to do about child care." Many of the attendees demonstrated an interest in "doing something" about child care, but they lacked awareness of what exactly they should do. For example, another mayor indicated that he had ARPA dollars he wanted to dedicate to child care but he didn't know the best way to use them to make a difference in the time he had to expend them.

Similarly, during a presentation at the GICH Annual Conference and in subsequent one-on-one interviews LIIF heard from city officials, local CDFIs, and other stakeholders their belief in the need for child care and their interest in promoting and supporting the expansion of child care. While generally the support is universal, understanding of the uniqueness of the business is often lacking. One participant at the conference said that whether you were "a shoe repair or child care, you can get your business going fast in [city]. I can't see preferencing one business over another though, that wouldn't be fair." Echoing a lack of clarity about the ways child care is regulated at the state level, and the role local jurisdictions can play, one city manager stated that they saw child care as equivalent to adult day homes and "We want more child care, but we have to have some way to be sure they aren't locking kids up."

On a positive note, interest in expansion was echoed among representatives from the Atlanta Regional Commission, the Georgia Department of Community Affairs, and the Georgia Planning Association. All the representatives shared personal or professional interest in childcare and could identify ways their agency could contribute. For example, the Atlanta Regional Commission works with GEEARS on mapping child care in communities. A representative of the Georgia Planning Association, speaking on her own behalf, described a variety of ways she felt GPA could support local governments in advancing child care through providing guidance to local planners. Generally, interviewees mirrored the desire we heard from child care providers and advocates to have support and understanding from local governments and a willingness to work together to make that happen.

Despite regional differences, overall there were of consistencies in the concerns of early childhood educators across the state. As seen in the previous section, issues like understanding zoning, barriers associated with renting or homeownership, and facility challenges exist across the state. However, as one representative for the Georgia Chamber Foundation pointed out, child care has become more and more decentralized, making it harder to know who to go to for help. Due to this decentralization, individual governing bodies are the ones making the ultimate decisions for their counties. Thus, local officials can play a key role in advancing child care in their communities.

Economic Development: Boom or Bust?

As a state, Georgia has made a significant commitment to economic development and is the #1 state for business according to the Georgia Department of Economic Development. Attracting and growing new business in the state has been a priority with the Governor stating "Georgia is the best place to live, work, and raise a family, and that starts with good jobs." (Governor Brian Kemp, January 2023). While the economic growth and commitment to job creation is important, the existing child care shortage across the state will only be exacerbated without concurrent attention to child care – making it hard for Georgia to be the best place to raise a family.

LIIF was able to see one example of the impact economic development is projected to have in the four-county region of Bulloch, Bryan, Chatham, and Effingham. Multiple actors, including a joint development authority of the four counties attracted a new Hyundai OEM/Auto Assembly facility and an EV battery Joint Venture between Hyundai and LG, as well as affiliated suppliers through a combination of land purchase and tax incentives. The OEM/Battery project is a $7.59 billion investment resulting in an estimated 8,500 jobs. Suppliers have added another $2.4 billion and expect to add over 6,400 jobs. The commitment to increasing job opportunities in that region is clear. However, during a tour of the plant and a in subsequent meeting with the a representative of one of the four economic development authorities, who was joined by the school district and local colleges, all noted the need for child care expansion to meet current and projected need. While all noted this need and a desire to address the issue, there was a lack of clarity about specific ways to address the need or even who should be responsible. More recently, the community planning group has identified a child care planning committee to address the needs in their county.

However, this general disconnect between efforts to grow jobs and simultaneously grow child care supply is not unique to this project or even to the state of Georgia. Fragmented systems and funding mean that local jurisdictions frequently divorce the two. Further the challenges and potential remedies facing the child care sector are not well understood, making it more difficult to bring the two efforts together. Colorado provides an example of a state attempting to include child care as a component of economic development through it Child Care Contribution Tax Credit. Georgia and or/its localities could mirror this type of approach as a way of incentivizing both business and child care growth.

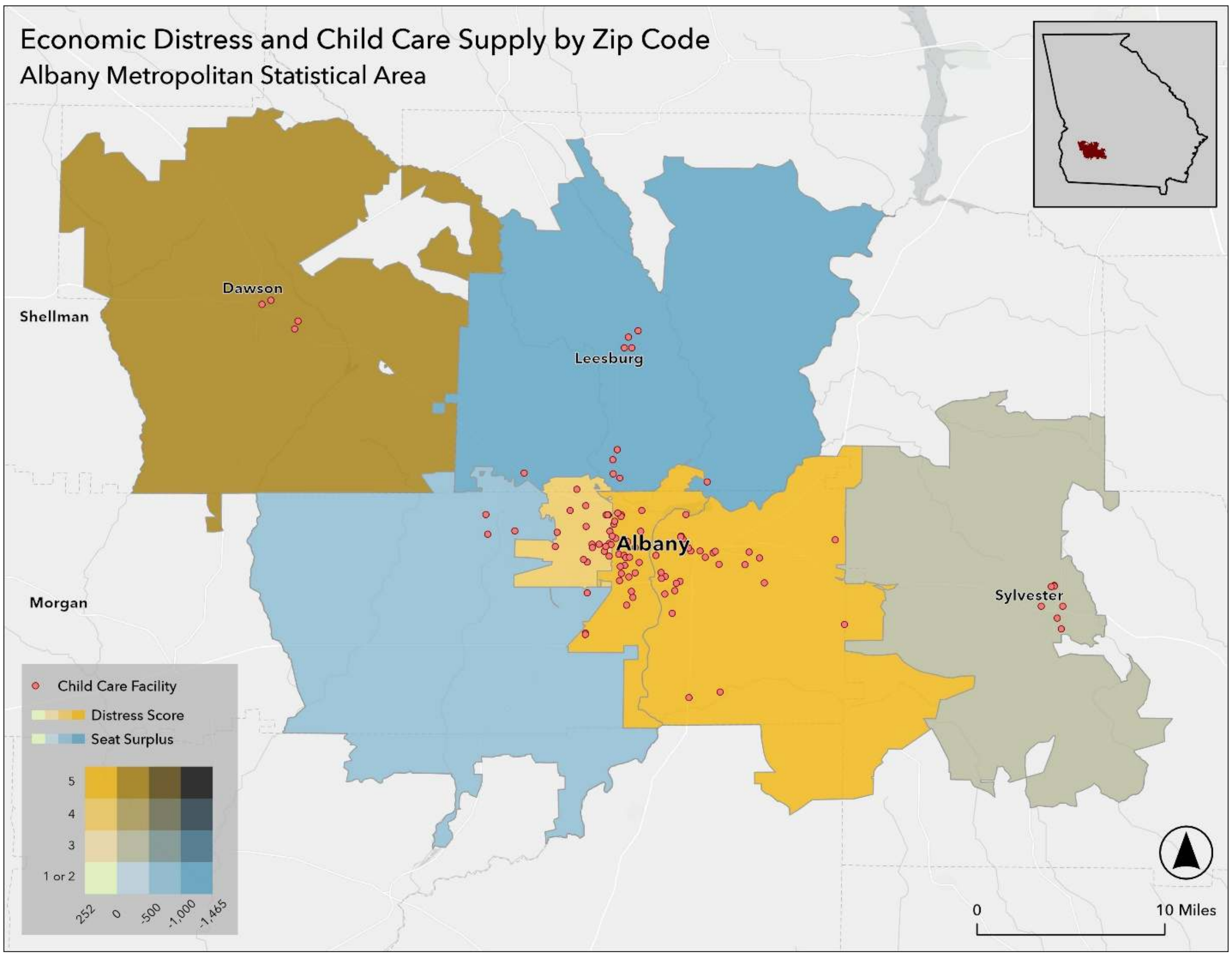
A Starting Point for Connecting Child Care Needs to Community and Economic Development Priorities

The State of Georgia is experiencing a period of unprecedented growth, especially in regions of the state benefitting from big economic development investments and job creation. Economic growth is an important underlying factor in boosting local wages, improving quality of life, and reducing poverty, but without the right supports in place to ensure residents can take advantage of new jobs, big investments could fall flat. A community's supply of convenient, affordable child care is a critical component to ensuring return on state and local investments in industry and economic development. However, as discussed throughout this report, interviews and focus groups LIIF conducted across the state revealed clear disconnects between those focused on the vibrancy of local and regional economies and those responsible for expanding supply of child care.

To demonstrate the connection between child care and economic conditions, this section includes discussion of high-level mapping and spatial analysis completed by LIIF to better connect child care and economic development in the Georgia Municipal Association's 13 "Hub" cities. Only specific local maps are shown and discussed in text, but those for all 13 geographies are included in Appendix B. Maps display actual locations of licensed child care facilities in zip codes that fall within the metropolitan statistical area (MSA) for each city in the context of measures of economic distress and gaps in child care supply by zip code. Economic distress designations come from the Economic Innovation Group's Distressed Communities Index which compares economic wellbeing of communities using US Census measures of employment, education, income, etc. Designations range from Prosperous and Comfortable (1 and 2) to At-Risk and Distressed (4 and 5). Child care supply data comes from the Georgia Department of Early Care and Learning's (DECAL) child care licensing data portal, which provides address-level information for all licensed child care facilities in the state, as well as the total amount of children programs are eligible to serve. Supply deficits are calculated as raw mismatches between total children ages 0-5 and total licensed child care seats in each zip code. This measurement is not a perfect descriptor of supply, actual parent need, or demand for licensed child care, but it can be helpful for assessing overall availability and maximum potential need in a community.

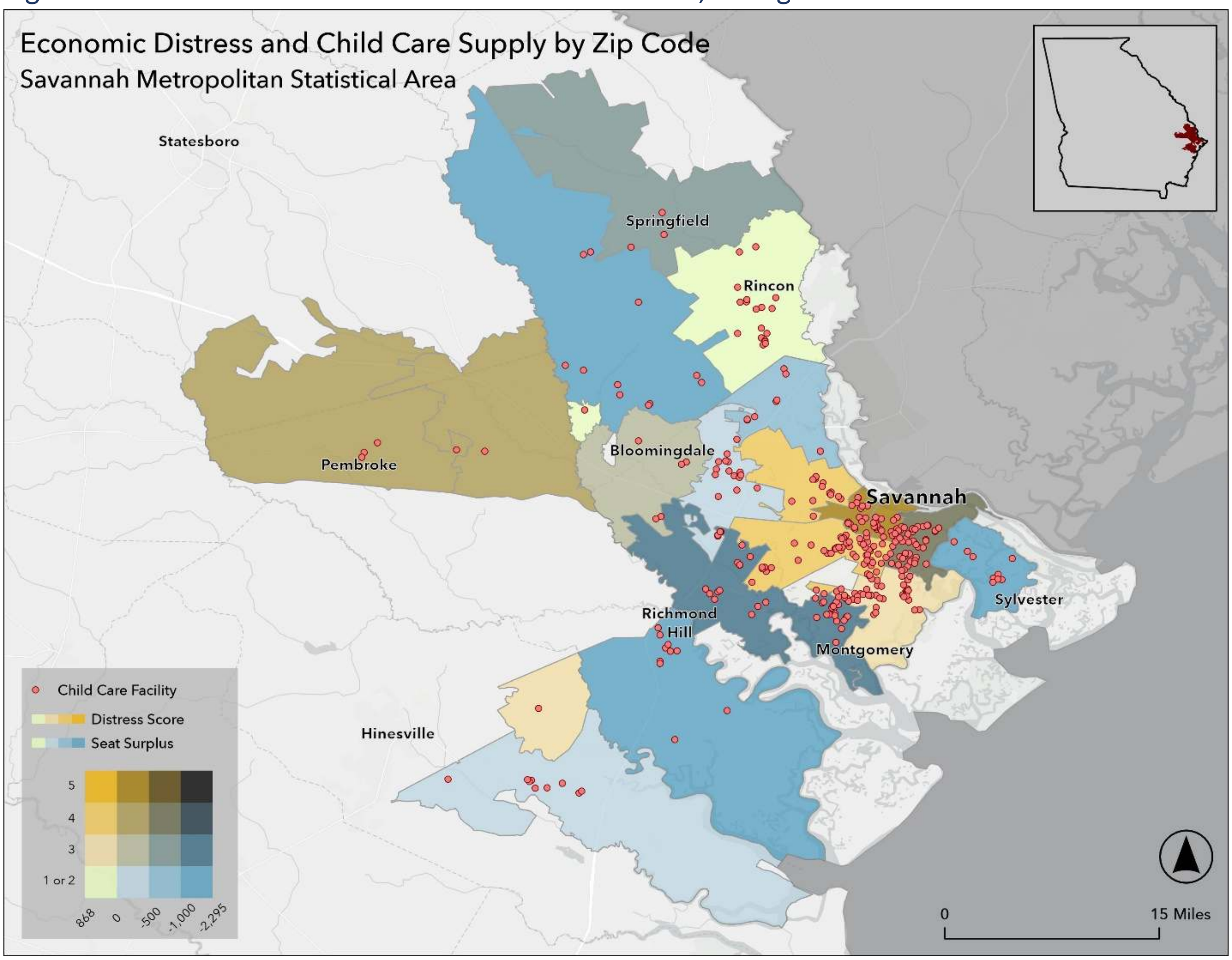
In addition, this section covers some of the high-level concepts and considerations that such analysis might trigger in two specific cities, but Appendix B includes all 13 MSA maps. As shown in Figure 1, economic distress designations and child care supply deficits are then aligned on a bivariate scale with sixteen possible outcomes for comparing zip code outcomes on the two distinct metrics. Zip codes highlighted in dark gold have sufficient child care supply but show signs of economic distress. Those in blue lack child care supply but are economically vibrant. Brown and dark blue zip codes both lack child care supply and are economically distressed. Designations for individual zip codes are only starting points for longer-term assessment and policymaking but can be helpful in connecting the dots across sectors and determining how to prioritize certain areas for intervention or forge local partnerships.

Figure 1. Economic Distress and Child Care in Albany, Georgia



Review of data for the Albany MSA offer a useful initial application of this analysis. Albany, like much of the broader, predominantly rural southwest region of the state it sits in, has seen consistent population declines and struggled to attract new industry and jobs in recent decades. Interestingly in the Albany metro area, the regions of relative economic prosperity tend to have more significant child care supply deficits than those with more significant signs of economic distress. For local officials, such insight might trigger distinct local interventions for building and improving supply. In the areas surrounding the City of Albany that currently have sufficient supply but severe poverty and economic challenges, local policy could be tweaked to focus explicitly on quality of child care facilities and connectedness to broader anti-poverty efforts, affordable housing development opportunities, and so on. Solutions may boil down more to connections across sectors that recognize the holistic challenges families living in poverty face on a daily basis. Comparatively, in areas surrounding Leesburg, where many in the region may seek out jobs or see as a nearby place for greater economic opportunity, local government may focus more on supply building efforts by partnering with employers or providing technical and financial support for well-established child care providers to open new facilities on publicly owned land.

Figure 2. Economic Distress and Child Care in Savannah, Georgia



In stark contrast to struggling regions of the state, places like the Savannah MSA shown in Figure 2 are experiencing dramatic population growth and economic change. Specifically, near the City of Pembroke, the closest municipality to the forthcoming site of a Hyundai electric vehicle and battery plant expected to create more than 10,000 jobs for the region, existing child care supply deficits may thwart the overall impact of state job investments without concerted focus and effort. In a more detailed analysis conducted by LIIF, only 5 licensed child care facilities were found to operate within a 10-mile radius of the site of the Hyundai plant, none of which offered after-hours child care that are critical to those working overnight or third shifts. The region also has high poverty rates and incidences of substandard housing conditions, particularly among Black families and children. Without focus on the needs of existing residents of this pocket of the Savannah MSA, job creation may simply further racial and economic inequity, especially if those who serve to benefit most lack secure child care and housing arrangements to take advantage of new, well-paying jobs.

Understanding child care supply in the context of existing economic conditions and planned job creation and development is critical for the work of diverse local and regional government entities. Although mapping and spatial analysis conducted for this report represents just an initial step at connecting these dots, we hope that further focus and consideration with local government officials using these methodologies may drive progress in diverse regions of Georgia.

Recommendations & Outcomes

Through the focus groups and interviews, recommendations were formed to address the common issues that providers in Georgia face. These recommendations have the intended outcomes to expand child care across the state, improve child care facilities and quality ratings, and create further support for providers. The recommendations are listed out below.

1. **Work with Georgia Municipal Association to support a cohort of city/county leaders**
   Given the clear need to support local jurisdictions to address childcare needs in their communities, LIIF believes a partnership with Georgia City Solutions, a Georgia Municipal Association nonprofit created to help cities address intergenerational poverty, would provide an avenue for building the supply of childcare in Georgia. We recommend working with Georgia City Solutions to create a cohort of cities committed to understanding their role in supply building. The cohort would build on existing work the organization has commenced focused on DEI, economic security and workforce development. Working together, the cohort members would each work with LIIF on a needs assessment, policy solutions, and strategic planning that, for each cohort member would include economic development organizations, local politicians, businesses, and child care providers. Working with Georgia City Solutions, and building on the learnings from the cohort, LIIF would develop a playbook for other cities to facilitate the expansion of child care in the community.

2. **Partner with the Professional Family Child Care Alliance of Georgia to train and support the alliance and members in facilities renovation and expansion, including navigating local government processes**
   Providers often cited difficulties navigating local government processes, including licensing and regulations, as well as needing training and support with facilities renovations or expansions. Focus groups revealed that providers often had differing or conflicting information regarding licensing, regulations, and facility needs. Moreover, providers did not have a resource they could rely on to give them the correct information. Thus, LIIF would propose a partnership with the Professional Family Child Care Alliance of Georgia (PFCCAG) to develop a sister playbook to the one developed with Georgia City Solutions. This would include information and guidance regarding facilities renovation, expansion, and navigating local government process. The playbook would be rolled out to providers in a training session with follow up available on an as needed basis.

3. **As a member of the Georgia Infant Toddler Coalition, explore policy change to address facilities funding needs of providers across the state.**
   While it's vital to support and train providers through facilities renovations and expansion, renovations and expansions cannot take place without address the funding needs of providers across state. Therefore, LIIF recommends a policy solution that, with the support of Georgia Infant Toddler Coalition, that would address the financial aspects of facilities needs.

From these recommendations, LIIF would expect several outcomes that would strengthen the child care system, sustain providers, and lead to economic growth. These outcomes are as follows:

1. Local communities will have plans for expanding child care that includes family child care and will have removed policy and fee barriers to expansion making it easier for family child care and center-based child care to navigate the system.
2. Georgia City Solutions will build its capacity to support members to expand child care ensuring local elected and appointed officials remove barriers to and support child care in their local communities.
3. PFCCAG will build capacity to support its members to navigate local policy processes as they renovate and expand their facilities to provide ongoing technical assistance to their members.
4. Georgia Infant Toddler Coalition will include facilities funding in policy priorities and advocate at the state level for facilities funding.

Conclusion and Next Steps

LIIF's year of listening and learning about the state of child care illuminated the challenges, barriers, as well as the joys of being a provider in the state of Georgia. Providers shared how their career paths led them to child care—a love for children, seeing a deficit in quality options, wanting to provide a better and more stable future for their family. Yet, despite the love of the work, providers were not aware of the labor that would be expected of them. Navigating governmental agencies, filling out endless paperwork, pouring their lifesavings into their programs, are all the unintended consequences of starting a child care program. Addressing these issues by lessening the burden would allow providers to do what they do best, serve children.

Georgia as a state is at a crucial turning point, poised for economic growth in some counties, with other counties far behind. Child care is a vital part of a healthy and robust economic system, making it an important issue for policymakers to tackle to help build robust, just economies. Local policymakers and officials working cross-counties to address the consistent issues faced by child care providers will allow for streamlining of regulations and further prosperity of the child care system. Through partnerships with organizations like PFCCAG, Georgia City Solutions, and Georgia Infant Toddler Coalition, policy changes that meet the needs of providers can be further explored and supported, with the goal of leading to outcomes that increase the quality of programs, expand child care across the state, and boost the economic system of Georgia.

Acknowledgement: This research was funded by the Annie E. Casey Foundation. We thank them for their support but acknowledge that the findings and conclusions presented in this report are those of the author(s) alone, and do not necessarily reflect the opinions of the Foundation.

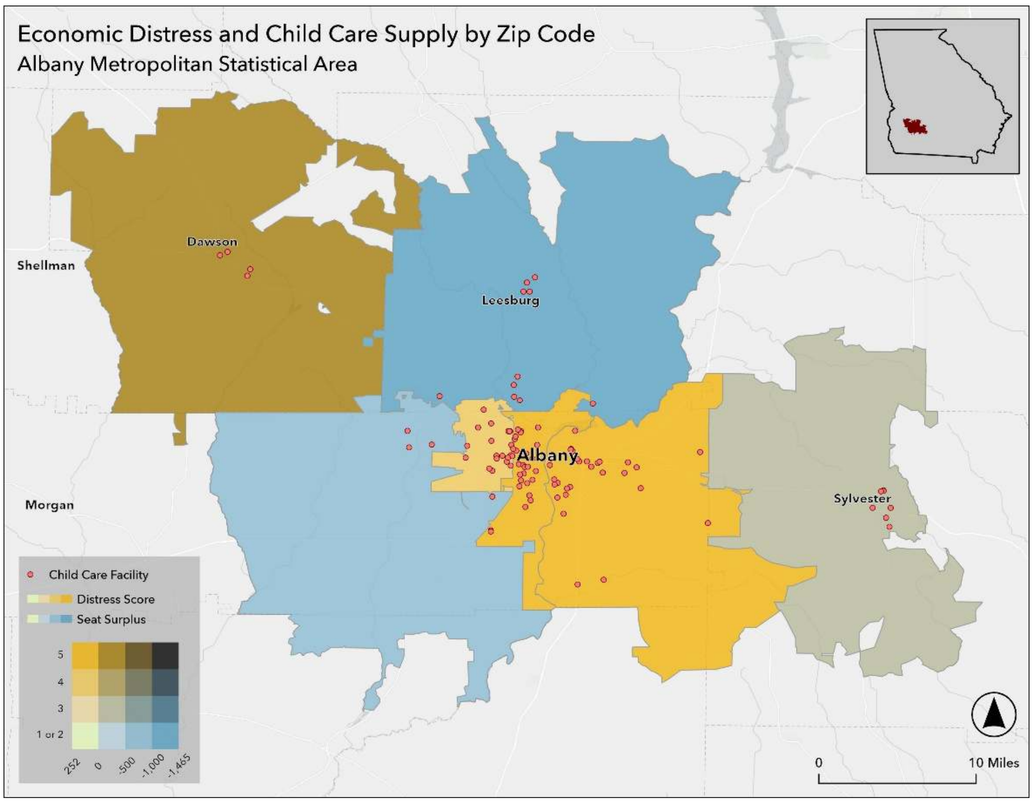
Appendix A. Stakeholder Engagement

Throughout the year of study, LIIF connected with more than 80 stakeholders from across the state of Georgia. This list includes the organizations represented throughout that process.

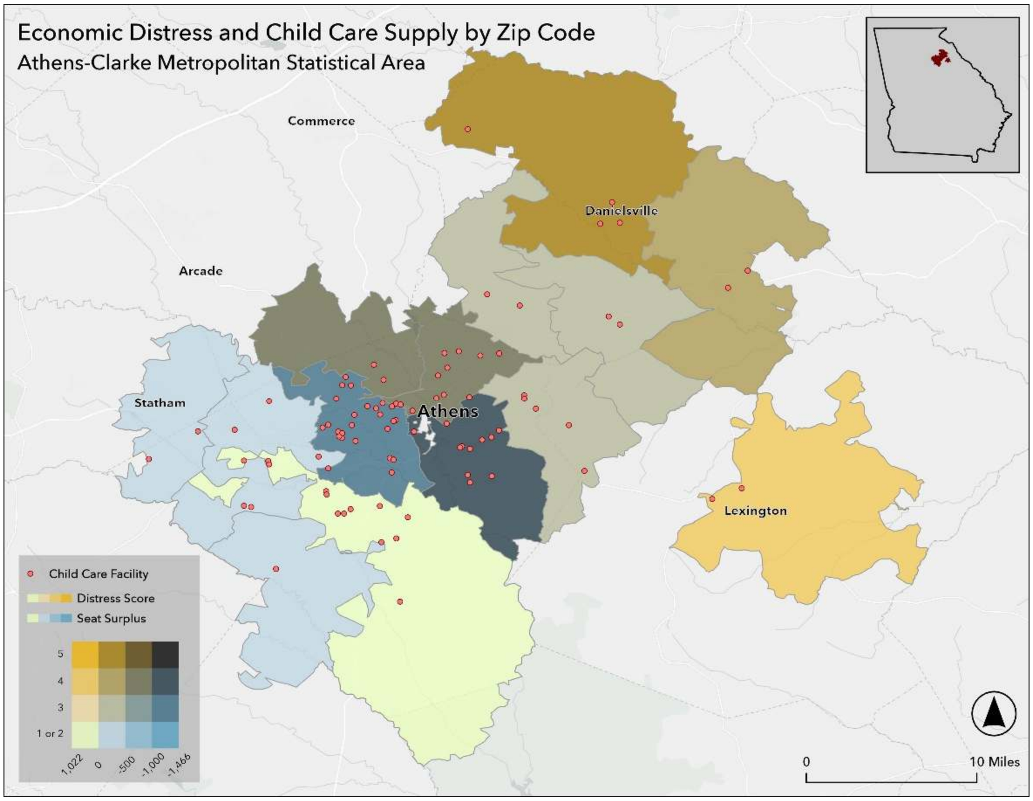
- Athens-Clarke County
- Atlanta Regional Commission
- Bulloch County School District
- Carl Vinson Institute of Government at the University of Georgia
- Children and Youth Advisory Council, Georgia Municipal Association (20+ local elected officials)
- City of Sandy Springs
- Development Authority of Bulloch County
- Early Learning Property Management
- Georgia Chamber of Commerce
- Georgia City Solutions
- Georgia Department of Community Affairs
- Georgia Department of Early Care and Learning
- Georgia Early Education Alliance for Ready Students
- Georgia Initiative for Community Housing
- Georgia Municipal Association
- Georgia Power
- Georgia Southern University
- Governor's Office of Student Achievement
- Greenbriar Children's Center
- Hub Cities Initiative, Georgia Municipal Association (13 mayors and city managers)
- Innovation Day Care
- Kids First Child Care
- Office of U.S. Senator Raphael Warnock
- Ogeechee Technical College
- Macon-Bibb County
- Professional Family Child Care Alliance of Georgia
- Purpose Built Communities
- Southwest Georgia Child Care Resource and Referral Agency
- Quality Care for Children
- Savannah Harbor-Interstate 16 Corridor Joint Development Authority
- United Way of the Coastal Empire
- Voices for Georgia's Children
- West Point Housing Authority
- Yvette's World Child Care

Appendix B. Economic Distress and Child Care Supply Maps

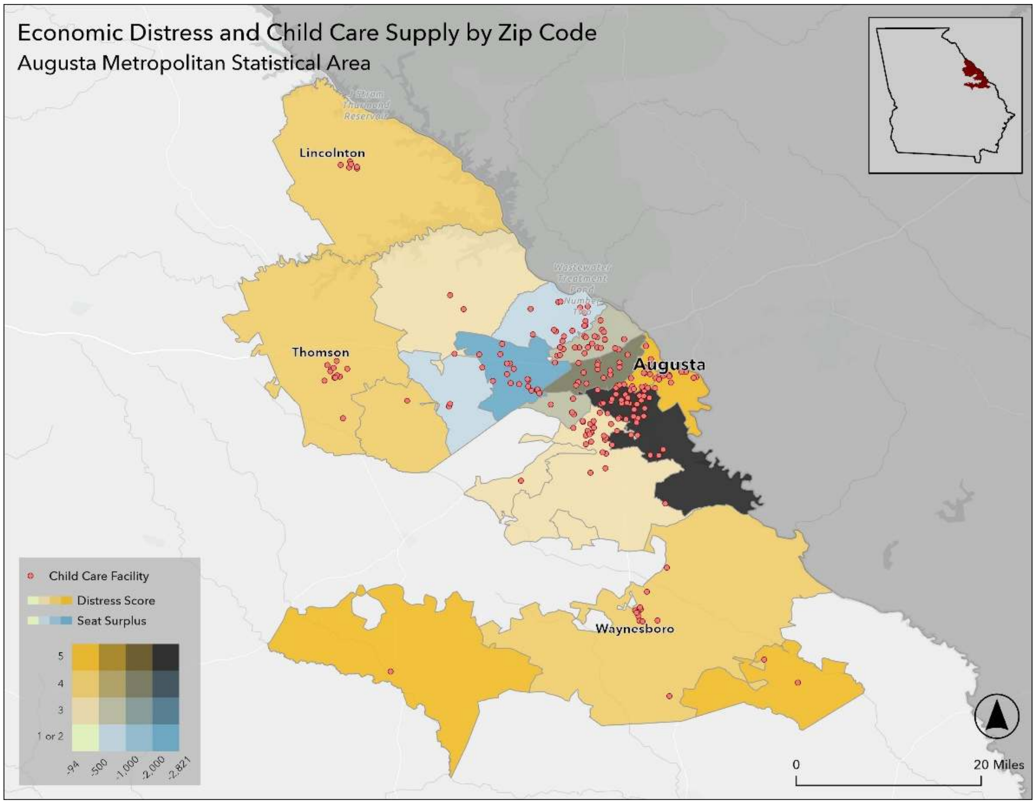
As noted in the text of the report, economic distress designations and child care supply deficits are aligned on a bivariate scale with sixteen possible outcomes for comparing zip code outcomes on the two distinct metrics. Zip codes highlighted in dark gold have sufficient child care supply but show signs of economic distress. Those in blue lack child care supply but are economically vibrant. Brown and dark blue zip codes both lack child care supply and are economically distressed. Designations for individual zip codes are only starting points for longer-term assessment and policymaking but can be helpful in connecting the dots across sectors and determining how to prioritize certain areas for intervention or forge local partnerships.



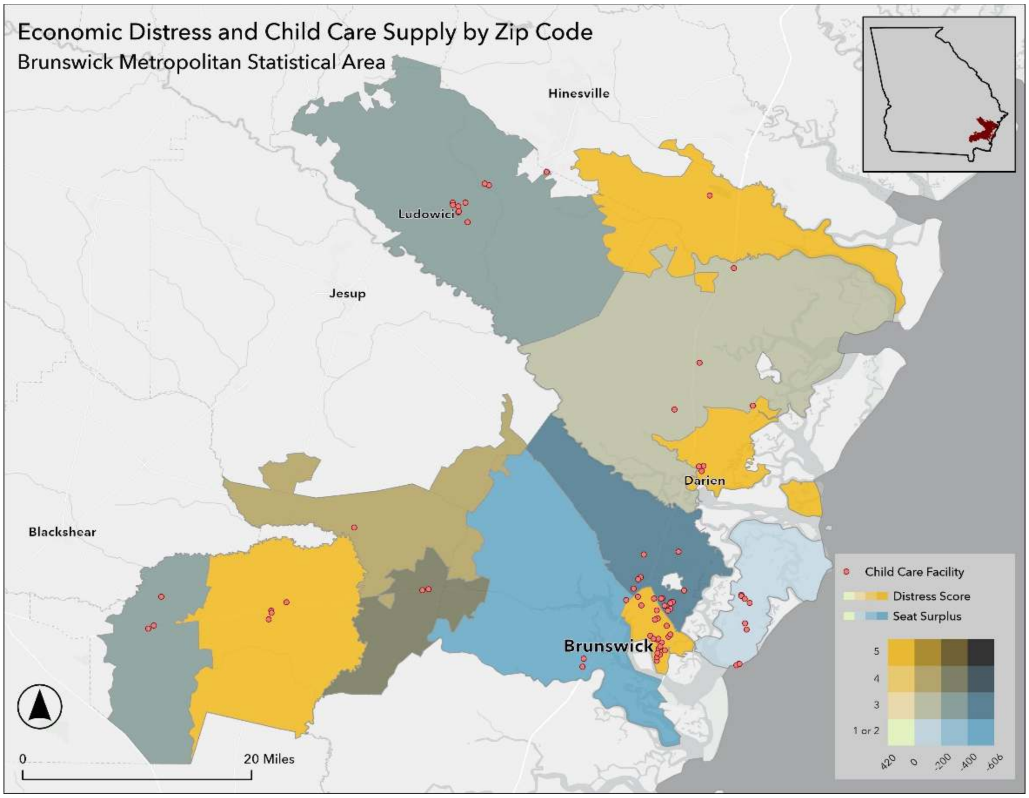
The Albany Metropolitan Statistical Area shows zip codes highlighted in dark gold have sufficient child care supply but show signs of economic distress. Notably the majority of the child care in this MSA is concentrated in an economically distressed zone but one with a higher population density.



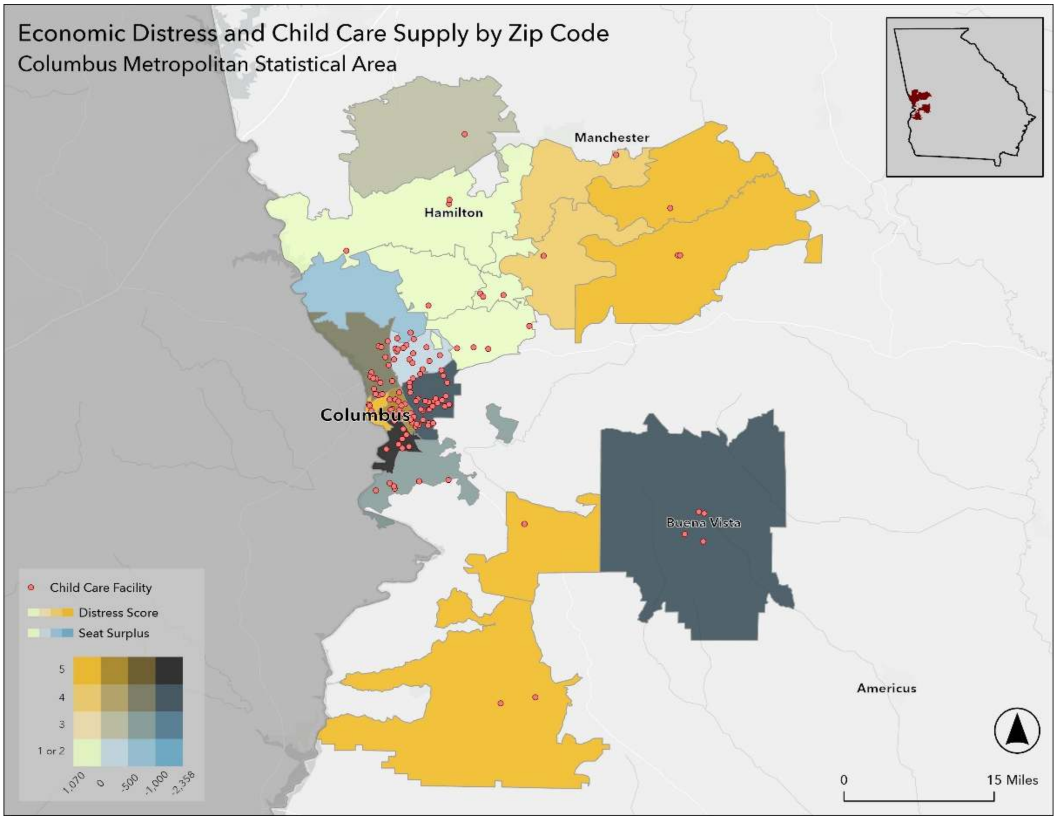
While there is some supply of child care in economically vibrant zip codes (light blue), the Athens-Clarke Metropolitan Statistical Area shows many child care facilities located within the economic distress score (dark brown and yellow). The highest concentration of child care supply are highlighted in dark blue zip codes which both lack child care supply and are economically distressed.



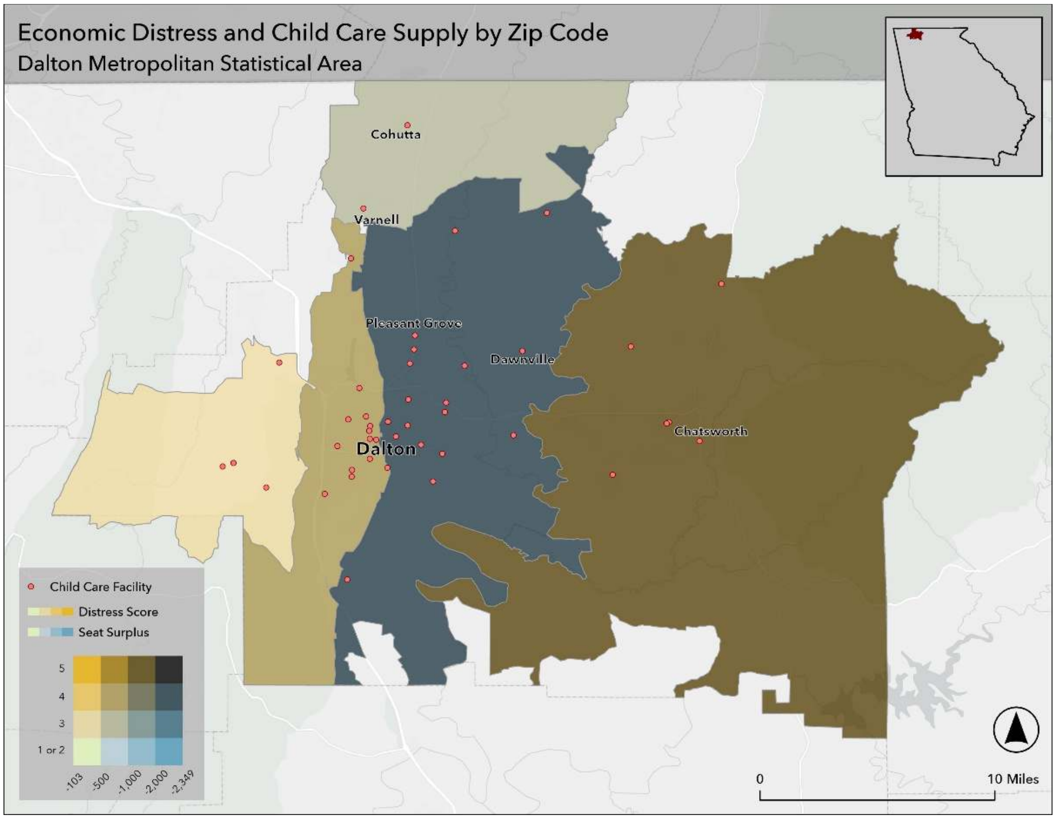
The Augusta Metropolitan Statistical Area displays a large number of zip codes showing sign of economic distress, highlighted in dark gold, yellow, and brown, with large concentrations of child care supply. Those in light blue offer some child care supply and are economically vibrant.



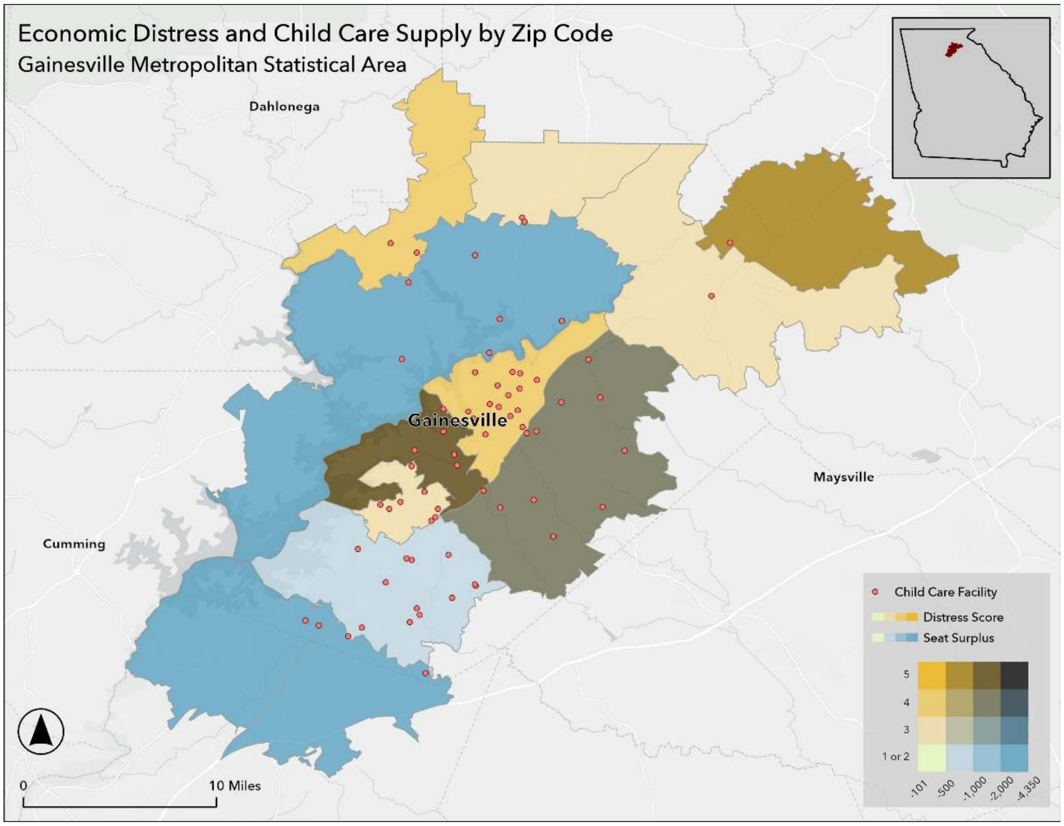
The Brunswick Metropolitan Statistical Area shows zip codes highlighted in dark gold and brown which offer some child care supply but show signs of economic distress. Those in blue offer less child care supply but are economically vibrant. Brown and dark blue zip codes both lack child care supply and are economically distressed.



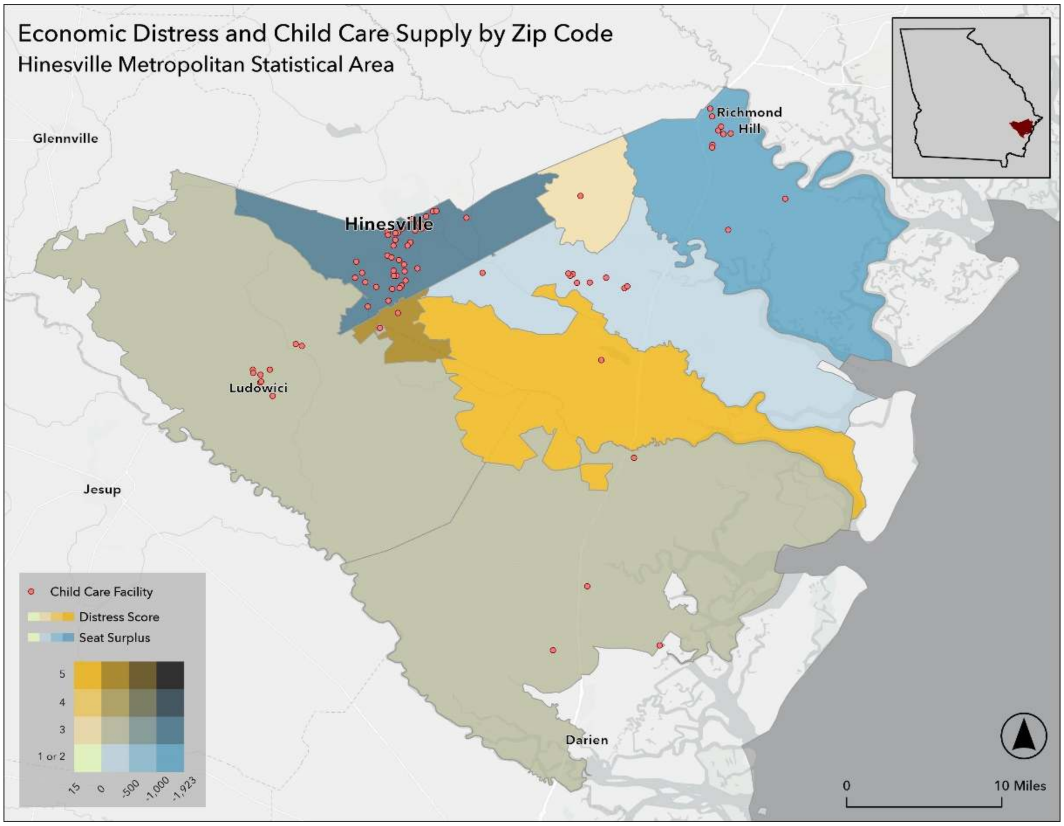
The Columbus Metropolitan Statistical Area has a high concentration of child care facilities across zip codes in economic distress (dark gold, dark brown, dark blue) with some supply in economically vibrate zip codes (light blue).



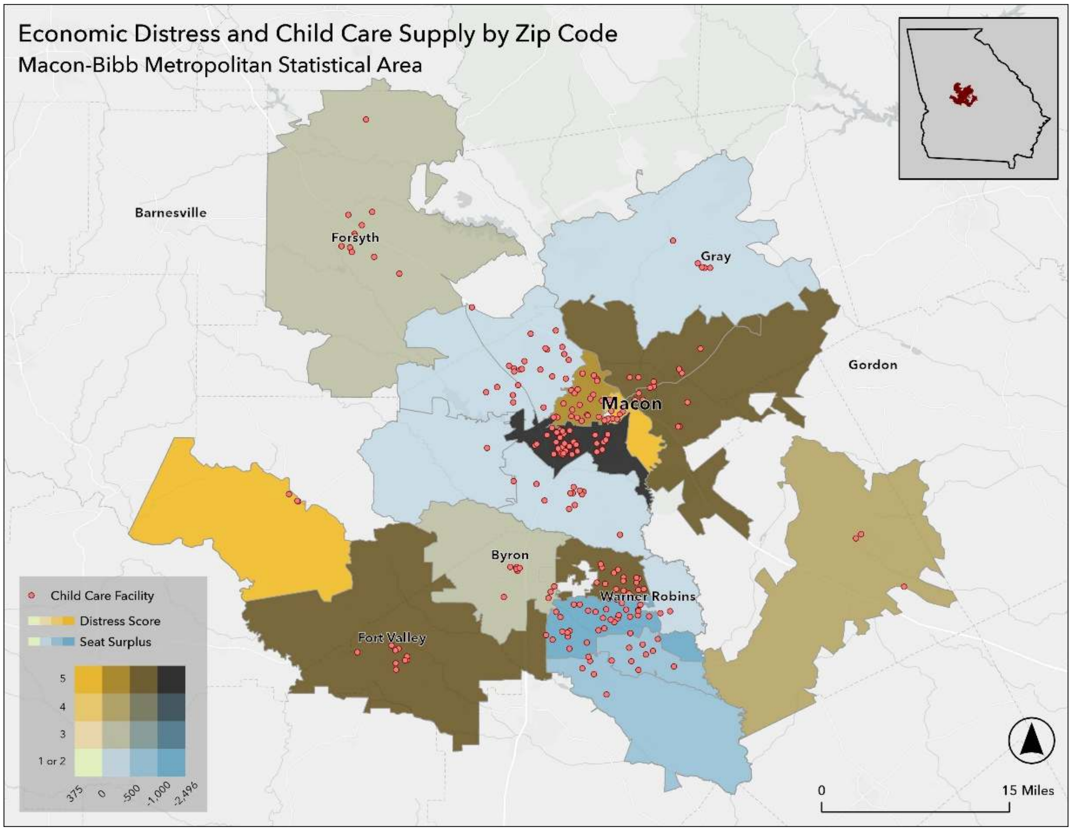
Most zip codes in the Dalton Metropolitan Statistical Area reflect child care supply in areas of high economic distress, noted in shades of brown and dark blue.



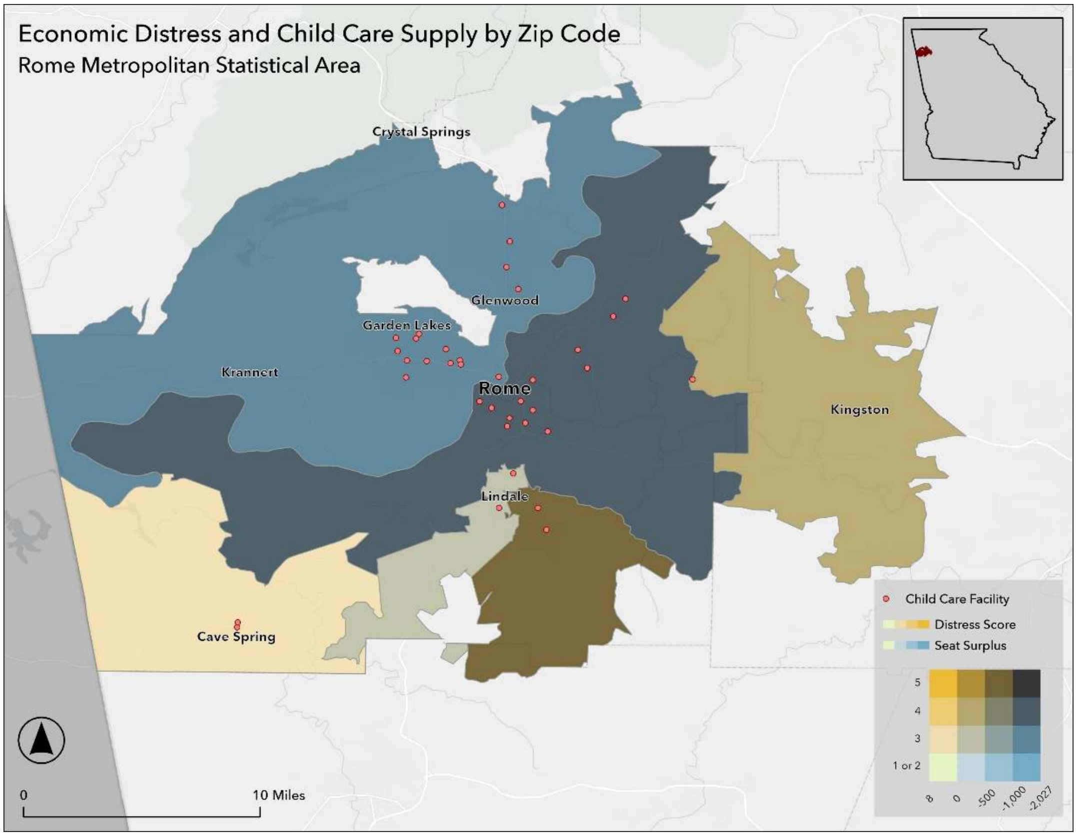
While the Gainesville Metropolitan Statistical Area shows some child care facilities in zip codes of economic distress (shades of yellow and brown) there are also child care facilities located in zip codes of economic vibrancy (blue).



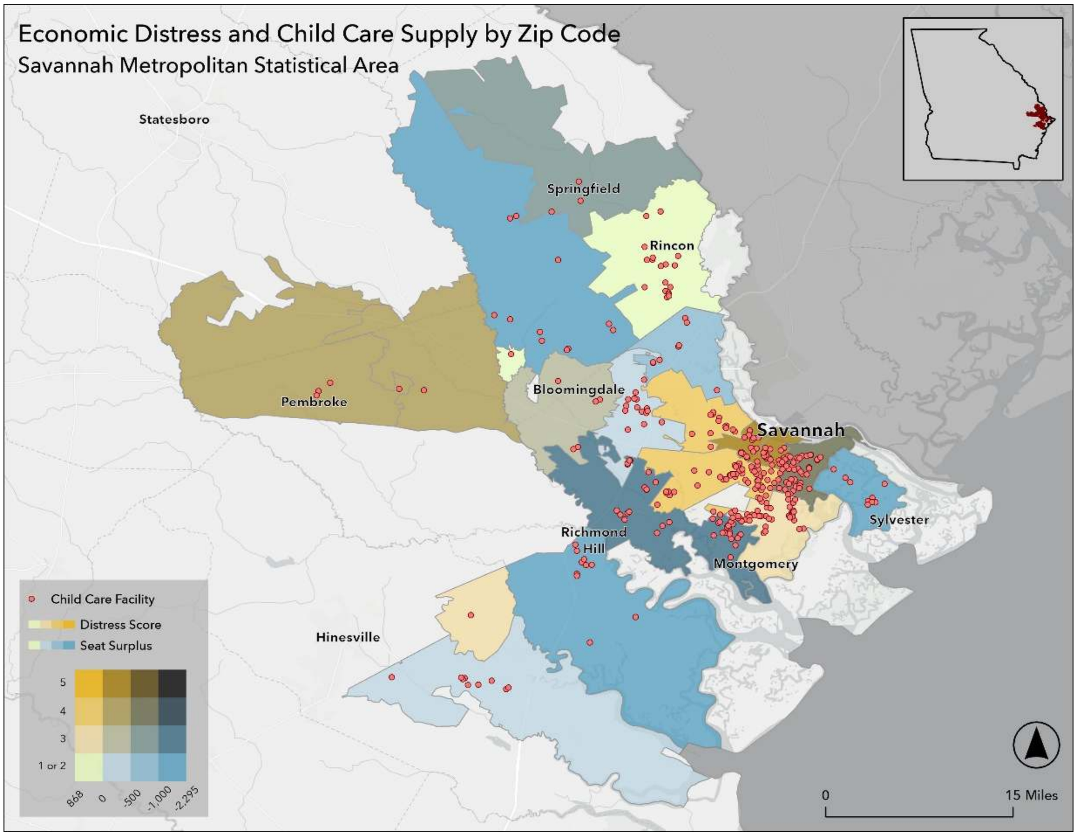
The majority of the Hinesville Metropolitan Statistical Area child care facility supply are located in zip codes in economic distress (dark blue) with some located in areas in zip codes of economic vibrancy (light blue).



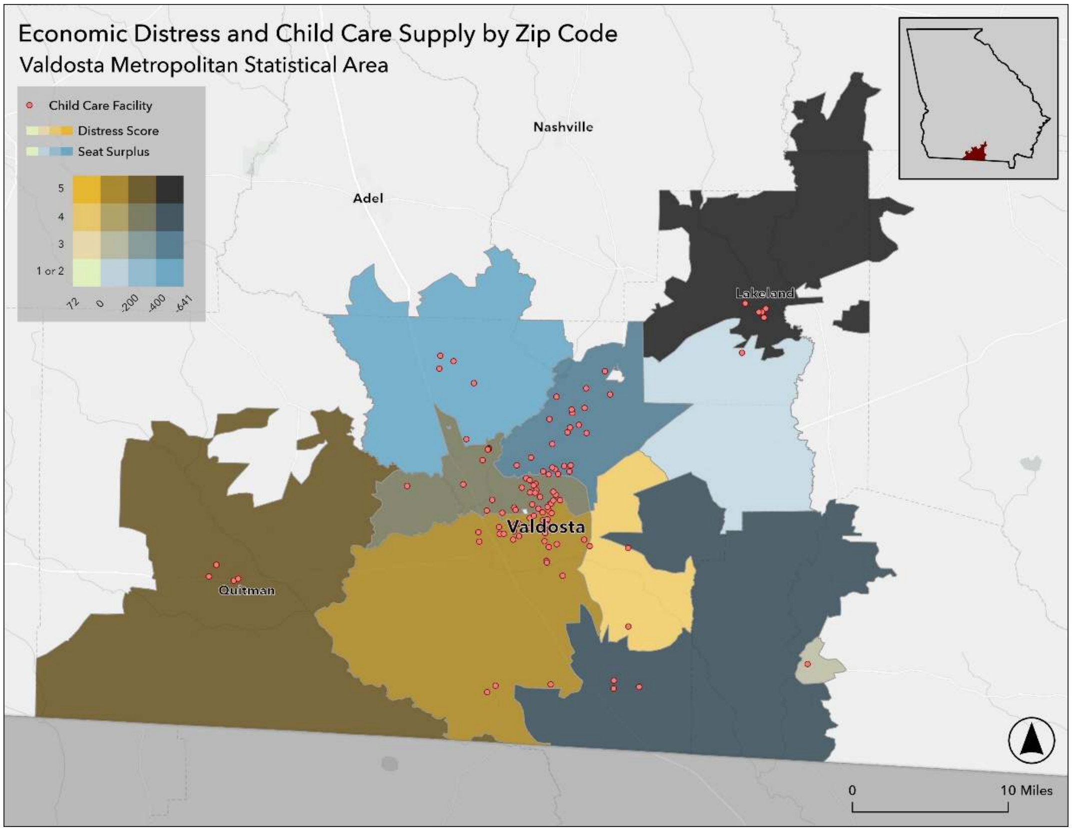
There is a high concentration of child care supply in the Macon-Bibb Metropolitan Statistical Area. Many are seen in zip codes of economic distress (dark gold and dark brown), and some are seen in zip codes of economic vibrancy (light blue).



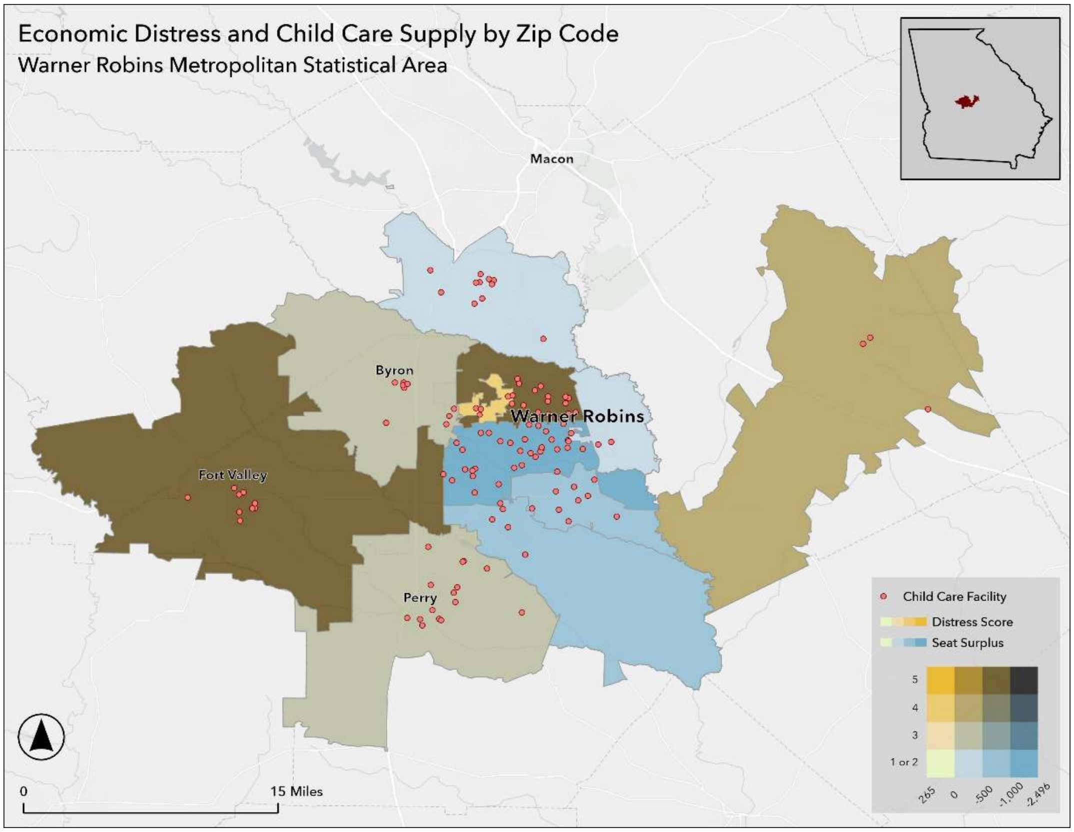
Higher levels of economic distress are seen in the Rome Metropolitan Statistical Area with supply of child care seen concentrated in the center of the map.



The Savannah Metropolitan Statistical Area shows high concentrations of child care in the more densely populated urban areas and across economic distress categories. While the areas poised for economic growth show a lack of adequate supply.



Valdosts MSA shows a significant lack of child care outside of the more urban core and in both economically distressed and economically vibrant neighborhoods but inadequate supply in much of the region.



Metropolitan Statistical Area