Greater Dubuque Child Care Analysis
Introduction

In January 2022, Levi Architecture was tasked with surveying businesses on behalf of the Greater Dubuque Development Corporation and Dubuque Initiatives to assess recruitment and retention barriers related to child care. The child care crisis continues to gain attention, especially during the pandemic. Businesses continue to see employment as the most significant barrier to growth and financial stability. Our team was able to interview 30 businesses in a wide variety of industries, scales and perspectives throughout the greater Dubuque area. Goals for the business surveys include gathering information and interest in specific child care services that may help alleviate employment barriers.

Complimenting the business survey, our team (in collaboration with Child Care Resource & Referral) also surveyed the existing provider industry in the greater Dubuque area. Over 40 child care centers and over 60 child development home were surveyed with 19 interviews conducted. Our goal with provider engagement was to open dialogue with the local providers, understand their barriers to expansion and gather interest in potential partnerships.

The next step is to prioritize the barriers for both businesses and providers. These prioritized barriers will be the targets for a series of collaborative discussions with all stakeholders to generate practical solutions that address broad initiatives and specific, targeted opportunities.
In early 2022, the Levi Architecture team interviewed 30 businesses within Dubuque county. The interviews were intended to discuss employee child care barriers and gather feedback to determine needs and possible solutions.

Participating Employers

<table>
<thead>
<tr>
<th>Industry</th>
<th>Average Number of Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retail/Service</td>
<td>37% (11 employers)</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>63% (19 employers)</td>
</tr>
</tbody>
</table>

Average Number of Employees

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 100</td>
<td>48%</td>
<td>15 employers</td>
</tr>
<tr>
<td>100-400</td>
<td>2%</td>
<td>1 employer</td>
</tr>
<tr>
<td>400+</td>
<td>44%</td>
<td>13 employers</td>
</tr>
</tbody>
</table>

Greater Dubuque Development Corp.
## Business 1st shift Start Times

Number of business and employees by start time

<table>
<thead>
<tr>
<th>Time</th>
<th>Number of Business</th>
<th>Number of Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>3:00 AM</td>
<td>2</td>
<td>235 employees</td>
</tr>
<tr>
<td>4:00 AM</td>
<td>2</td>
<td>250</td>
</tr>
<tr>
<td>5:00 AM</td>
<td>3</td>
<td>250</td>
</tr>
<tr>
<td>6:00 AM</td>
<td>21</td>
<td>9324</td>
</tr>
<tr>
<td>7:00 AM</td>
<td>3</td>
<td>765</td>
</tr>
<tr>
<td>8:00 AM</td>
<td>6</td>
<td>1298</td>
</tr>
<tr>
<td>9:00 AM</td>
<td>1</td>
<td>422</td>
</tr>
</tbody>
</table>

### Percentages of business by shifts

<table>
<thead>
<tr>
<th>Shift Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Shift</td>
<td>21%</td>
</tr>
<tr>
<td>24/7</td>
<td>52%</td>
</tr>
<tr>
<td>1st &amp; 2nd Shift</td>
<td>27%</td>
</tr>
</tbody>
</table>

6 employers | 16 employers | 8 employers
Number of Workers by Start Time

- 6:00 AM: 73.5%
- 7:00 AM: 9.3%
- 8:00 AM: 9.5%
- 9:00 AM: 1.4%
- 3:00 AM: 3.6%
- 4:00 AM: 2.7%
Common Barriers Relating to Child Care

Numbers represent amount of respondents for each barrier.

- **Overall Availability**: 26
- **Sick Care**: 15
- **Infant Care**: 13
- **Transportation**: 9
- **2nd/3rd Shift Availability**: 12
- **Affordability**: 18
- **Drop-In Care**: 11
- **Loss of Provider**: 10
- **Language Barriers**: 3
Company Initiatives in Place

- Daycare FSAs
- Split/Part-time Shifts
- Work at Home
- Flexible Work Schedule

Number of Businesses
Companies Interested in Learning More about Childcare Support

100%
Yes

Companies Interested in Partnering with Childcare Services

93%
Yes

7%
Potentially

[Logos: LEVI Architecture, Greater Dubuque Development Corp.]
We learned of a surprising breadth of strategies businesses are implementing to support employees and the recognition of the role family dynamics play in the employment market. Clearly, flexibility of the work environment is the number one strategy utilized by businesses to retain and attract employees. This flexibility includes altering first-shift start times, part-time shifts, split shifts and work from home option where possible. Businesses are being creative, unique and specific with initiatives to suit their particular challenges and available resources.

Three businesses shared their model of existing, on-site child care service for employees. All three businesses expressed the incredible value their child care services provide to employees and their company culture. Several others were exploring on-site care or a direct partnership with an existing local provider. The overall need of availability was expressed from employers. 26 employers (86%) reported a barrier of overall availability of child care, and 13 employers (43%) expressed the need for infant care.

All businesses see the need to support their employees and families, and thus are interested in hearing more about solutions or initiatives that will come from this study. Almost all those entities surveyed were excited to explore some form of solution with the Greater Dubuque Development and child care providers that increases the overall capacity and address the other areas of greatest need, ie "gap care" (sick care, drop-in care, infant capacity, earlier start times).
In the fall of 2021 the Levi Architecture team began interviews with child care centers. In phase 1, we interviewed five child care center directors. In early 2022 we followed up with a survey to all 42 child care centers with a survey and then additional interviews with 10 center directors.

**Child Care Feasibility**

18 child care centers reporting

- **4,182**: total children in the Dubuque area
- **2,220**: children reached through our surveys

**Center Capacity**

Average capacity: 123.33

11 of 18 centers track wait list by age group. Infant and School Age were the areas of largest need per interviews.

**Waitlist**

Average waitlist is 25 children
Child Care Feasibility

Do you offer drop in care?

- Yes
- No
- Only if we have staff to meet ratio

Do you offer sick care?

100%

Extended hours

- Yes: 18.2%
- No: 63.0%
Child Care Feasibility

Are you planning to expand your child care center?

Partnership

Are you interested in potential partnerships within the Greater Dubuque area with businesses?

18 responses

- **Yes**: 14 (77.8%)
- **No**: 2 (11.1%)
- **Not sure**: 1 (5.6%)
- **I'm interested in more information**: 1 (5.6%)
In early 2022 the Levi Architecture team began interviews with Child Development Homes. We surveyed 62 Child Development homes, 20 responded. We followed up with two zoom interviews. We will continue to utilize our partnership with Child Care Resource & Referral to engage our Child Development Homes.

Who we heard from

![Graph showing number of children represented and respondents total for different categories]

- Category A: 0 children represented, 0 respondents
- Category B: 100 children represented, 0 respondents
- Category C1: 50 children represented, 0 respondents
- Category C2: 25 children represented, 0 respondents
Days of the week care is provided

Which days of the week do you provide care?
19 responses

- Monday: 11 (57.9%)
- Tuesday: 9 (47.4%)
- Wednesday: 8 (42.1%)
- Thursday: 8 (42.1%)
- Friday: 15 (78.9%)
- Saturday: 2 (10.5%)
- Sunday: 1 (5.3%)

Do you provide drop in care?

- Yes: 60.0%
- No: 40.0%
Child Care Provider Summary

We were encouraged by the quality of care available in the greater Dubuque area. Providers are well-informed of the challenges of the families they service and have a willing attitude to support those families. The entire child care industry in the area is struggling with workforce. We feel this is the area of greatest need that the Greater Dubuque Development and Dubuque Initiatives is uniquely positioned to support.

Many providers have explored or were excited to explore expansion of their total capacity and/or service type. Specifically, we discussed the increase in capacity for infant care, earlier start times, drop-in care and sick care. Providers are open to expansion ideas but are lacking a financial model that allow for such expansions. Several providers expressed their immediate readiness to partner with the Greater Dubuque Development and/or individual businesses.
Report Summary

Our team is motivated by the elevated attention child care is getting through Greater Dubuque Development, Dubuque Initiatives and the Dubuque business community. Businesses are exploring ways to support their employees. Local providers being a strong group of collaborative professionals appear to be prime partners for the business community. There are clear opportunities for both groups to match resources and challenges with Greater Dubuque Development and Dubuque Initiative being the bridge.

Next steps should include a small group of interested business representatives and providers to lay out prioritized challenges and opportunities to be the basis of solutions exploration. Both broadly and narrowly focused solutions should be explored. An example solution shared with those interviewed included a new facility which multiple businesses could support specifically designed to address location, "gap care", cost and hours of operation. This idea was well received by businesses and providers.

Levi Architecture is grateful for the opportunity to provide the Greater Dubuque Development, Dubuque Initiatives, the Dubuque business community and the child care community with these survey results. We look forward to continuing our work by generating pro forma(s) for specific solution(s) to ensure their financial sustainability.