



The North Texas Child Care Workforce Study

October 2025

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Final Report

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The Prenatal-to-3 Policy Impact Center aims to accelerate states' implementation of evidence-based policies that help all children thrive from the start. We are a nonpartisan research center housed within Vanderbilt University's Peabody College of Education and Human Development.

The Policy Impact Center works to strengthen outcomes for children by supporting the equitable implementation of evidence-based state policies and programs. We offer guidance, actionable research, and tailored analysis to inform policy and real-world program decisions. Our work revolves around four pillars:

- (1) building the evidence base of policies that strengthen young children and families,
- (2) identifying which policies have the strongest evidence of effectiveness,
- (3) monitoring states' progress toward implementing effective policies, and
- (4) supporting states' policy action.

Our team of researchers and policy experts brings deep expertise in public policy, developmental psychology, public health, and social work. We collaborate closely with state agencies, nonprofit organizations, and community leaders nationwide to translate complex data into actionable strategies. Through these partnerships, we aim to inform decision-making and support the implementation of policies that create the conditions necessary for children and families to thrive.

The Policy Impact Center began more than a decade ago in Texas as the Child and Family Research Partnership at The University of Texas at Austin. We remain deeply committed to supporting children and families in the state where our efforts originated.



Child Care Associates (CCA) is one of the largest child development nonprofits in Texas and has served more than half a million young children over the past 57 years. Through child care, Head Start, Early Head Start, PreK and Child Care Scholarships, CCA delivers quality early education programs to children and families with special focus on disadvantaged households. CCA, in partnership with local workforce boards, helps offset the high cost of child care for approximately 16,000 low-income children across North Texas as well as increases the quality of child care across the region. We pair our commitment to accessible early education and care with testing and scaling innovative practices that strengthen the early learning system and drive lasting change.

Building on this commitment to access and innovation, the Center for the Early Educator is a Child Care Associates' workforce development and research partnership with a focus on innovation. The Center for the Early Educator was established to address the critical need in Texas for early educators, specifically for ensuring that the North Texas region has a well-educated and supported early educator workforce essential for children (ages 0-5), for working families, and for industries in the growing economy.

The Center for the Early Educator seeks to support early learning professionals in achieving their full potential while addressing the workforce demands for quality care of young children. Through credential development, career development, community-centered research, and collective capacity-building, the Center for the Early Educator and partners aim to develop pipelines, pathways, and retention strategies needed for today's early educators.

The Center for the Early Educator is dedicated to:

- Convening regional workforce boards, institutes of higher education in the North Texas region, and credentialing non-profit agencies to collaboratively develop and implement solutions that build and strengthen the early educator workforce in the region.
- Engaging in community-driven research and data collection to better understand early educator needs.
- Collaborating with key stakeholders and policymakers to support the early educator workforce.

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Executive Summary

The North Texas Child Care Workforce Study provides a comprehensive picture of North Texas's early care and education (ECE) workforce, including workforce size, child care supply, educator characteristics, and experiences and challenges child care directors face. The findings support the development of data-driven strategies to improve families' access to child care and strengthen the early care and education workforce across the region.

In this report, we detail findings for child care programs across three local Workforce Development Board regions (Workforce Boards): Workforce Solutions Greater Dallas, Workforce Solutions for North Central Texas, and Workforce Solutions for Tarrant County.

Over 27,300 early childhood educators work in North Texas child care programs, with more than 10,300 additional educators needed to maximize child enrollment

- An estimated 27,312 early childhood educators currently work in North Texas's licensed/registered child care centers and homes.
- To fully staff existing child care programs and maximize the number of children served, an additional 10,399 early childhood educators would be required.
- The number of additional educators needed to maximize enrollment to providers' preferred staffing level is largest in Greater Dallas, which would require a 65 percent increase over its current ECE workforce to maximize enrollment and fully staff existing providers.
- Educator workforce estimates only reflect ideal staffing for existing providers and do not include potential new programs that may be required to meet unmet child care demand.

Approximately one-quarter of educators in center- and home-based programs have at least a bachelor's degree; center-based educators typically have 4 years of experience compared to 12 years for home-based educators

- In center-based programs, 24 percent of educators hold at least a bachelor's degree, and most (60%) have 5 years or less experience in the field.
- In home-based programs, 26 percent of educators hold at least a bachelor's degree, and most (54%) have 11 or more years of experience in the field.
- Most center-based educators (82%) and home-based educators (65%) do not currently hold a Child Development Associate (CDA) credential.

- The early education workforce is racially and ethnically diverse and varies widely across Workforce Boards. Among center-based educators, no single racial or ethnic group holds a plurality in Greater Dallas, unlike North Central Texas and Tarrant County, where White educators represent the largest share. In home-based programs, most educators are Black (55%).

The current ECE system is limited in its current capacity, and many child care slots remain unfilled

- An estimated 117,661 children ages birth to 5 are currently enrolled in licensed or registered child care programs across North Texas.
- Programs currently have the actual capacity to serve 167,513 children today if they fill all available slots. In other words, only 70 percent of available child care seats are filled.
- Programs report that, at maximum, they could collectively serve up to 196,321 children if they were fully staffed (i.e., fully-staffed capacity).
- Total licensed capacity for the region is 301,058, indicating that licensed capacity substantially overstates both the current actual capacity of child care and fully-staffed capacity, or the maximum potential supply of child care among current programs.
- If all current child care programs were enrolled to their fully-staffed capacity and including public pre-K, the current ECE system could serve up to 79 percent of children under age 5 in working-parent households.
- Child care supply estimates reflect child care capacity among existing providers only and do not capture unmet need for additional child care programs.

Child care programs struggle financially, at the same time as low wages and few benefits undermine workforce stability

- Most programs across North Texas are operating at a loss (34%) or just breaking even (39%); just 27 percent of directors report their program as currently profitable.
- With current subsidy reimbursement rates similar to or higher than most programs' tuition, most programs accept child care subsidies (70% of centers and 53% of homes) and would be willing to accept more children using subsidies than they currently do.
- Programs resoundingly report that public pre-K hurts their enrollment (71% of centers and 40% of homes).
- Turnover is high among center-based programs, with 70 percent of programs losing at least one-fifth of their staff annually.
- At the median, educators in North Texas earn \$15.00 per hour. Wages remain well below the local living wage for one adult living alone (\$23.86); only 4 percent of educators in North Texas make at least a living wage.

- Racial and ethnic wage gaps are present across the region, with differences across Workforce Boards. In Greater Dallas, center-based educators who identify as Black make less than center-based educators who identify as White or Hispanic, but in Tarrant County, Hispanic center-based educators make more than White center-based educators.
- Access to health, dental, and other benefits remains limited, even for full-time educators, with fewer than one in three educators having access to employer-sponsored health insurance.

The North Texas Child Care Workforce Study presents novel data on the actual size and composition of the early education workforce, and the current supply of child care that the current workforce supports. The study also provides metrics of potential supply among current programs and the number of additional educators needed to expand supply. Current programs also report a sizeable portion of currently vacant slots, underscoring a need for further exploration into child care demand and possible barriers to accessing child care.

Child care directors share clear challenges in financial stability, hiring and retaining a high-quality workforce, and the enrollment challenges caused by the expansion of public pre-K. Conversely, directors generally report that participating in the Texas Rising Star (TRS) program and participating in the Child Care Services program (CCS) are overall positive experiences.

Results from this study provide data to close vital gaps in the understanding of North Texas's child care system and highlight key areas to support child care programs as North Texas comes together to plan, build, and sustain a high-quality early education system.

Chapter 1. Introduction

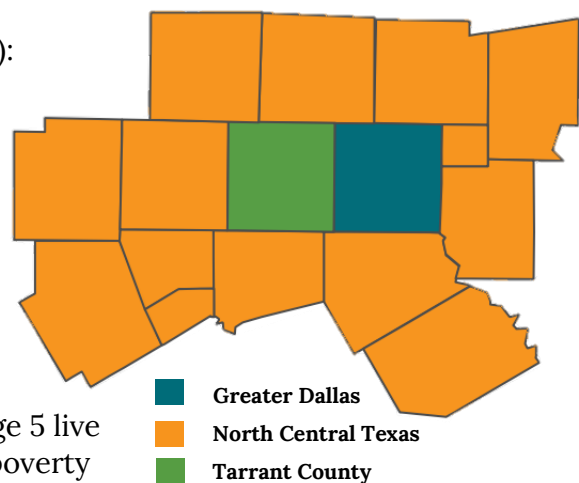
Overview

Child Care Associates (CCA) delivers early childhood development programs and services in North Texas, with a focus on developing high-quality early learning systems that serve the whole family and strengthen the pipeline of talent in early education.¹ CCA is in the process of developing a 10-year strategic plan to grow, develop, and sustain a thriving early care and education (ECE) workforce in North Texas.

The North Texas region includes three Texas Local Workforce Development Boards (Workforce Boards):

Workforce Solutions Greater Dallas, Workforce Solutions for North Central Texas, and Workforce Solutions for Tarrant County. Combined, these Workforce Boards serve a total population of over 8 million residents, including more than 500,000 children under age 5.^{2,3} The region is racially and ethnically diverse, with 29 percent of the population identifying as Hispanic, 16 percent identifying as Black, and 44 percent identifying as White.^{4,5}

Sixteen percent of young children under age 5 live below the poverty line.⁶ Across Workforce Boards, poverty rates range from 8 percent of children under 5 in North Central Texas and 11 percent of children under 5 in Tarrant County, to 21 percent of children under 5 in Greater Dallas.⁷



To inform the development of the strategic plan, CCA contracted with the Prenatal-to-3 Policy Impact Center (Policy Impact Center) at Vanderbilt University to conduct the North Texas Child Care Workforce Study. Spanning three Workforce Boards, the study aims to provide a comprehensive understanding of the current size, composition, and key features of the region's ECE workforce.

A clear understanding of the current workforce provides the foundation for a strategic plan that facilitates CCA and its state, local, and non-profit partners to tailor future policy and program decisions to support a thriving, high-quality ECE workforce and child care industry as the region grows over the next decade.

Background

The Importance of High-Quality Child Care

Child care is an essential resource for children, families, and the economy. Access to high-quality child care, where children experience safe, nurturing, and enriching environments, supports positive brain development and sets the foundation for future success in school and the workforce as adults.⁸

Beyond its direct benefits to children, affordable and accessible high-quality child care strengthens family economic security.⁹ Reliable child care allows parents to enter the workforce and maintain stable employment, increasing family earnings and self-sufficiency. In turn, increased financial stability improves early childhood developmental outcomes and contributes to broader economic growth.¹⁰

Insufficient child care access does not just have implications for families but also employers, state revenue, and the broader Texas economy.¹¹ The US Chamber of Commerce Foundation estimates that worker absenteeism and turnover associated with inconsistent access to child care costs Texas employers \$7.59 billion per year. Further, the US Chamber of Commerce Foundation estimates that lost worker wages because of a lack of access to child care cost the State of Texas an estimated \$1.8 billion in lost direct tax revenue, for a combined total annual economic loss of \$9.39 billion.¹²

The Current Child Care Industry

A Gridlocked System

Despite child care's vital role in supporting children's development and family wellbeing, the industry faces ongoing challenges that impact its sustainability. Nationally, early childhood educators are paid far below a living wage, have limited access to essential benefits such as health insurance and retirement plans, and approximately one-third experience food insecurity.^{13,14}

Unfortunately, the US child care industry operates within a persistent cycle of financial constraint. The already high cost of child care to families makes it difficult for directors to charge families more without risking pricing families out of the market, resulting in many programs operating on thin profit margins.¹⁵ With profit margins often less than 1 percent, directors cannot offer competitive wages and benefits, making hiring and retaining staff difficult.¹⁶

As a result, child care programs often struggle with understaffing, preventing programs from enrolling at full capacity, driving child care shortages, and further limiting a program's revenue.¹⁷ In this way, the child care market is an example of a market failure; the forces of supply and demand cannot remedy these challenges, calling for public investment.

Texas is no exception to these challenges in the child care industry. Across the state, child care directors are grappling with financial hardships that make hiring and retaining early childhood educators difficult.^{18,19} A key factor driving this instability is low wages. In 2021, the median wage for an early childhood educator working at a regulated child care program in Texas was \$12.00 per hour, making ECE jobs uncompetitive in the broader job market and leaving educators struggling to support themselves within the industry.²⁰

Simultaneously, child care remains a substantial financial burden for Texas families. Although the federal government considers child care affordable when it costs no more than 7 percent of household income, in 2023, child care costs were estimated to consume between 12 and 38 percent of household income in Texas for one infant and between 21 and 70 percent of household income for two children.²¹ Texas families cannot afford to pay

more for child care, exemplifying the ongoing cycle of financial constraints in the child care industry.

Within this gridlocked system, the persistent financial constraints in the child care industry directly undermine efforts to raise professional standards through higher educational attainment and credentialing for educators. Policy advocates and researchers have emphasized the importance of advanced credentials and degree attainment as a pathway to improving child care quality.^{22,23} Yet, with razor-thin profit margins, most child care programs cannot offer higher wages to match these qualifications. As a result, college degrees and credentials rarely lead to better compensation, leaving little incentive for current educators to pursue additional education or for highly educated individuals to enter or stay in the child care industry.²⁴

Recent Child Care Policy Changes

Changes in funding and policy further compound workforce challenges. The American Rescue Plan Act (ARPA) provided stabilization funds that supported many child care programs and expanded families' access to care. With the expiration of these funds in 2024, many directors now face financial uncertainty, forcing some to raise tuition, reduce staff, close classrooms, or close their programs entirely.²⁵

Concurrently, shifting national subsidy guidelines require child care directors to adapt to an evolving child care landscape. New federal rules under the Child Care and Development Fund (CCDF) now require states to cap family copayments at 7 percent of income and encourage more timely, consistent payments to child care providers.^{26,27} Although these changes aim to improve access and stability, they also require child care programs to adjust operationally and financially, usually with fewer resources.

Texas also sought to strengthen the quality of child care and the ECE workforce, leading to legislative efforts aimed at long-term improvements to the child care industry. In 2021, the 87th Texas Legislature passed House Bill (H.B.) 619, directing the Texas Workforce Commission (TWC) to develop a strategic plan to improve the quality of the ECE workforce.²⁸ Still, no specific legislative bills have been enacted in Texas that directly address increasing compensation, reducing turnover, or eliminating pay disparities for early childhood educators.²⁹

However, in 2023, Texas passed Senate Bill 1145, along with its accompanying constitutional amendment, Proposition 2, to alleviate financial pressures on child care programs serving families with subsidized child care by allowing local governments to offer tax exemptions.^{30,31} To qualify, programs must participate in the Texas Rising Star (TRS) program and serve a child care population where at least 20 percent of children receive subsidies. The exemption may not be less than 50 percent of the child care program property's appraised value, depending on local jurisdiction decisions. As of late 2024, 14 counties and 11 cities in Texas had adopted the property tax exemption for qualifying child care programs, and only approximately 17 percent of the estimated 15,000 child care centers in Texas met the eligibility requirements.^{32,33}

Texas Workforce Commission

Texas's approach to child care funding creates a lever for industry change at the regional level. In Texas, 28 Workforce Boards, in partnership with the Texas Workforce Commission, are responsible for determining how to strategically invest state and federal funds to provide child care subsidies to eligible families and collaborate with child care directors to strengthen the ECE workforce. Working within the bounds of the resources allocated, Workforce Boards enable targeted strategies that strengthen the ECE workforce in response to local needs.³⁴ Workforce Boards also support child care directors by promoting workforce development through training, mentorship, and quality improvement initiatives.

Gaps in Data at the Workforce Board Level

To design effective and innovative initiatives that improve workforce quality, it is crucial to have a comprehensive understanding of the local landscape, including workforce size, demographic composition, qualifications, and perceptions and experiences of child care directors.³⁵ Currently, no data provide specific information on the total size of the early childhood education workforce, or whether additional educators are needed. Gaps also exist in understanding the background and experiences of early childhood educators, resulting in a limited understanding of who is, or is not, being served by current industry standards.

Additionally, many child care programs operate below their full licensed capacity, which could lead to an overestimation of the actual child care supply available and challenges in estimating the supply of child care across infants, toddlers, and preschool-aged children.³⁶ Existing data sources also do not provide information on the proportion of child care slots designated for families receiving subsidies, making it difficult to evaluate whether child care access is equitable. More comprehensive local-level data is needed to develop effective, data-driven strategies for recruiting and retaining a high-quality ECE workforce and expanding families' access to high-quality child care.

Current Evaluation

To inform the development of a 10-year strategic plan to grow, support, and sustain the ECE workforce across the Dallas-Fort Worth Metroplex, CCA contracted with the Policy Impact Center at Vanderbilt University to conduct the North Texas Child Care Workforce Study. To fill gaps in the data needed to create the strategic plan, the Policy Impact Center surveyed directors of licensed and registered center- and home-based child care programs across three Workforce Boards of interest: Workforce Solutions Greater Dallas, Workforce Solutions for North Central Texas, and Workforce Solutions for Tarrant County.

The North Texas Child Care Director Survey collected individual-level data on the educator workforce from directors of licensed and registered center- and home-based child care programs, including education, experience, and educator wages. The survey also assessed the current child care supply and industry challenges. The Policy Impact Center also collected data on the pre-K workforce from national, publicly available administrative data.

The North Texas Child Care Workforce Study offers baseline data to inform local and regional efforts in strengthening and building the region's ECE workforce over the next 10 years by:

- Providing current estimates of the total number of early childhood educators in North Texas
- Providing current estimates of the total child care supply in the region
- Examining child care providers' challenges and experiences
- Analyzing compensation of the North Texas ECE workforce

The present report details findings from the North Texas Child Care Workforce Study.

Chapter 2. Methodology

Data Sources

The North Texas Child Care Workforce Study relied primarily on four data sources: state child care licensing data, the North Texas Child Care Director Survey, public pre-K program data, and population estimates from the American Community Survey.

Texas Child Care Licensing Data

Texas collects detailed information about all registered, listed, and licensed child care programs within the state.³⁷ We used the Texas Child Care Licensing Data current as of June 7, 2024, for two purposes: 1) we used the full list of programs and their characteristics to develop the population of child care programs eligible to participate in the study; and 2) we used available program characteristics throughout the analysis.

When identifying the population of child care programs eligible for the study, we removed all child-placing agencies, general residential operations, listed family homes, temporarily closed programs, and programs that provided only before and/or after-school care or only school-age care.

In total, 3,108 child care programs remained in the survey-eligible population.

The 2024 North Texas Child Care Director Survey

The Policy Impact Center conducted the North Texas Child Care Director Survey online and by phone between November 2024 and January 2025. We distributed the survey to 3,108 center- and home-based child care programs located across the three North Texas Workforce Boards.

In all, 722 child care programs engaged with the survey (23% response rate), of which 679 were eligible, consented to participate, and responded to at least one survey item.

The North Texas Child Care Director Survey was offered only in English and Spanish, potentially introducing selection bias by limiting participation among directors who speak other languages.

Public Pre-K Program Data

To estimate total public pre-K enrollment and the total number of public pre-K educators, we retrieved United States Common Core of Data (CCD) district- and school-level data from the National Center for Education Statistics (NCES).^{38,39} We used public pre-K enrollment by school and district and the number of Full-Time Equivalent (FTE) public pre-K educators by district when estimating child care supply and the current size of the child care workforce, respectively. To reflect the common classroom structure in which each public pre-K educator works alongside a paraprofessional, we doubled the FTE educator estimates to get the size of the total public pre-K workforce.

American Community Survey Population Characteristics

The US Census Bureau annually conducts the American Community Survey (ACS) to estimate demographic, social, and economic characteristics of the US population. We used 5-year estimates of population counts, employment, poverty, and race/ethnicity from the 2023 ACS for this study.^{40,41,42,43,44,45,46} We aggregated county-level estimates to gain an understanding of the North Texas population and used ZIP code-level population characteristics to improve our predictions of the size of the child care workforce and child care supply.

Key Terms

Child Care Supply

Throughout the report, we refer to three key measures of child care capacity to reflect different aspects of supply:

- **Current Enrollment:** this measure refers to the number of children a provider reported as enrolled at the time of the survey.
- **Actual Capacity:** this measure refers to the number of children a provider could serve immediately, given current staffing levels and resources. Differences between current enrollment and actual capacity reflect the number of open (or vacant) slots in a program.
- **Fully-Staffed Capacity:** this measure reflects the maximum number of children a provider would ideally serve if the program were fully staffed, sufficiently funded, and had sufficient operational resources. Added up across all providers, fully-staffed capacity reflects the maximum number of children that existing programs could serve at one time. This estimate is based on providers' self-reported preferred staffing levels.

Estimates for fully-staffed capacity are limited to existing providers. The study does not measure the need for new providers or account for the unmet demand for child care.

Child Age Groups

Throughout the report, we divide age groups into the following categories: infants (birth through 17 months), toddlers (18 months through 35 months), preschoolers (3 years through 4 years), and school age (children enrolled in before- and after-school care). These age categories align with the Texas Workforce Commission's definitions used for the Texas Rising Star quality rating system.⁴⁷

Early Childhood Educators

In this report, educators refer to individuals who work directly with children in early care and education (ECE) settings, including teachers, assistant teachers, aids, and staff providing care and instruction. In home-based programs, both owner-educators and their staff are included in the definition of educators, unless otherwise specified. Center-based

directors are not considered educators for the purposes of our analyses (e.g., size of educator workforce or educator wages).

Samples and Analytic Approach

Because of variation in survey item response rates and the goal of each research objective, each objective in the study required different samples and analytic approaches. For each sample described in the following sections, we began with the full sample of eligible surveys (N=679) and excluded respondents who did not provide the values necessary for the analysis or who provided values that indicated a likely error in data entry, such as unreasonably high values. We describe any additional exclusion criteria where relevant.

Estimates of Early Educator Workforce Size and Characteristics

Early Care and Education (ECE) Workforce Sample

To estimate the size and composition of the early educator workforce in North Texas, including the current number of educators, the number of educators needed if programs were fully staffed, and the difference between the two, we relied on the ECE Workforce Sample. This sample included two subsamples generated from the surveyed sample's staffing reports:

- Current Educator Subsample: 598 programs (center-based programs n=428, home-based programs n=170) with usable values for the current number of employed educators.
- Fully Staffed Subsample: 461 programs (center-based programs n=298, home-based programs n=163) with usable values for the number of educators they would employ if fully staffed, meaning enough educators to fully enroll the maximum number of children they would ever choose to serve.

Analytic Approach

Workforce Counts

We used the survey sample staffing reports (i.e., from the Current Educator Subsample and Fully Staffed Subsample) to generate estimates of the size of the full workforce (i.e., all 3,108, including programs without a valid survey response). To estimate the number of current educators and the number of educators needed in a fully staffed workforce, we first conducted regression analyses to detect provider characteristics from the state licensing data and ZIP code-level population characteristics that significantly predicted total staffing levels reported in the subsamples.

We then used these models to estimate the number of current educators and the number of educators in a fully staffed workforce for all programs in the population to maximize the number of children they could enroll (i.e., reach fully-staffed capacity). Next, we subtracted the number of current educators from the number of educators if fully staffed to estimate the number of additional educators needed for current providers to be fully staffed.

To estimate the total count of current educators, the total count of educators needed if fully staffed, and the total number of educators needed to bridge the difference, we summed each of these counts across the North Texas region and for each Workforce Board.

Additionally, we provided the estimated number of public pre-K educators from the 2023-2024 Public Pre-K Program Data to comprehensively document the size of the ECE workforce in North Texas.

Workforce Characteristics

In the survey, directors reported the demographic characteristics of the educators employed at their program and their own characteristics. We used data from programs in the Current Educator Subsample to estimate the current composition of the ECE workforce across all programs. Specifically, we used educator-level data reported by directors at programs that provided valid responses.

After removing Head Start programs and any records missing necessary information, our analytic sample included 2,772 educators across 395 programs. We used this sample to estimate workforce characteristics for the full population of early childhood educators across North Texas.

Because the survey sample was not fully representative of the population of North Texas child care providers, we estimated workforce characteristics by stratifying the sample by program type and subsidy acceptance where possible. We applied stratified percentages to the remaining 2,713 programs (non-respondents), representing approximately 24,500 educators, to estimate characteristics at the population level.

For example, we began by focusing on one subgroup: center-based programs that accept subsidies. Within this group, we used survey responses to calculate the percentage of educators with different education levels. We then applied those percentages to the full population of educators in subsidy-accepting center-based programs, including programs that did not respond to the survey. We repeated this process for center-based programs that do not accept subsidies. After completing the estimates for each subgroup, we combined them to produce overall estimates of educator education levels across all North Texas center-based educators.

Workforce characteristics presented in this report are estimates intended to provide a summary-level picture of the make-up of the workforce. These data should not be used to assume the exact number of educators with specific characteristics or credentials.

Estimates of North Texas's Child Care Supply

Child Care Supply Sample

To estimate the current child care supply and the potential child care supply in North Texas, including current enrollment, actual capacity, and fully-staffed capacity, we relied on the Child Care Supply Sample, which included three subsamples:

- Current Enrollment Subsample: 640 programs (center-based programs n=460, home-based programs n=180) with usable values for their current enrolled children.
- Actual Capacity Subsample: 636 programs (center-based programs n=460, home-based programs n=176) with usable values for their current open slots.
- Fully-Staffed Capacity Subsample: 450 programs (center-based programs n=298, home-based programs n=152) with usable values for how many children they would care for at a given time if fully enrolled and fully staffed.

State licensing data include total licensed capacity for all programs in the population. Although our estimates focus on the current and full enrollment of children under 5 years of age, total licensed capacity is not broken out by age group and therefore overestimates early childhood capacity for any programs that provide care for school-age children.

Analytic Approach

To estimate current enrollment, actual capacity, and fully-staffed capacity in the child care program population based on valid survey responses, we used a similar approach to estimating workforce size. First, we used regression models to detect whether provider characteristics from the state licensing data and ZIP code-level population characteristics significantly predicted total enrollment and capacity values reported by the samples. Next, we used these models to estimate total current enrollment, open slots, and fully-staffed capacity values for all programs in the population that did not respond to the survey or provide usable data.

To ensure data quality, we limited estimated values to a reasonable range by replacing values above a certain threshold with the maximum allowable value (i.e., capped a value). Specifically, we capped current enrollment and actual capacity to no more than 2.5 times the program's licensed capacity, which resulted in the adjustment of three current enrollment values and eight actual capacity values.

For fully-staffed capacity, we applied a narrower threshold, capping values at no more than 1.2 times the program's licensed capacity, which resulted in the adjustment of 107 values. Our knowledge of child care programs informed these data quality decisions. Because some programs may offer part-day care or have children who attend alternating schedules (e.g., Monday, Wednesday, Friday or Tuesday, Thursday), a program's current enrollment or actual capacity may appropriately exceed its licensed capacity and still operate within regulatory standards.

In comparison, fully-staffed capacity was calculated from a survey section asking directors how many children they would serve at a specific time of day. As a result, fully-staffed capacity estimates could not reasonably exceed licensing capacity.

To estimate current enrollment, actual capacity, and fully-staffed capacity for North Texas and by Workforce Board, we summed the estimates for total count of children currently enrolled (current enrollment), the total count of current enrollment and open slots (actual

capacity), and the number children who could be served if programs were fully staffed and fully enrolled (fully-staffed capacity).

We used a stratification approach similar to the one used to estimate workforce demographic characteristics to calculate current enrollment, actual capacity, and fully-staffed capacity by age group. Specifically, we stratified our sample by both subsidy acceptance (i.e., subsidy-accepting/non-subsidy accepting) and program type (i.e., center-based/home-based).

Within each stratum (e.g., a center-based program that accepts subsidies), we calculated the percentage of enrolled children, the percentage of open slots, and the percentage of children programs would serve, belonging to each age group. These percentages were then applied to the full population to generate regional estimates by age group.

We use these estimates in multiple analyses throughout the report to examine different aspects of child care capacity. Where relevant, we assess differences between measures (e.g., current enrollment vs. actual capacity) to better understand gaps in supply. Additional details are provided in each relevant chapter.

Additionally, we provided the reported number of children enrolled in public pre-K from the 2023-2024 Public Pre-K Program Data and the total estimated number of children under 5 years enrolled in formal child care, including public pre-K.

Program Characteristics and Director Experiences

The survey included numerous questions to gather information about the experiences of directors in North Texas. To better understand directors' experiences, challenges, and opportunities for support, we descriptively examined directors' responses.

The North Texas Survey Sample includes 558 child care programs that responded to a substantial portion of the survey (center-based programs n=395, home-based programs n=163).

Some survey questions applied only to certain types of providers (e.g., centers only, programs that reported accepting subsidies, etc.), and not all directors responded to every survey item; therefore, sample size varies by survey item. Program Characteristics and Director Experience results represent observed data from the sample and may not be representative of the population.

Educator Wages Across North Texas

Educator Wage Sample

We used the Educator Wage Sample to examine variation in current educator wages in North Texas. Initial exclusion criteria included Head Start programs, programs participating in CCA's Prime Early Learning Pilot Wage Program, and respondents or programs missing key values necessary for analysis.

After applying these criteria, the sample contained only 38 home-based educators (i.e., educators who are not the owner-educator, but work at home-based programs). Because

this subgroup was too small to include alongside center-based educators, we excluded home-based educators from the predictive wage analysis. The final analytic sample included 2,238 center-based educators across 216 programs. Wages for home-based educators and home-based owner-educator wages are reported descriptively.

Wage Data

Directors provided educator wage data as either an annual salary or an hourly wage. We adjusted annual salaries to an hourly wage, assuming educators with annual salaries worked 40 hours a week and 52 weeks a year. We considered wages below the federal minimum wage of \$7.25 per hour or above \$100 per hour unusable and excluded these educators from the Educator Wage Sample.

Analytic Approach

We used multivariate linear regression to assess how educators' hourly wages vary by program and educator characteristics, holding other factors constant. For example, we used regression analyses to compare the average hourly wages between educators of different races/ethnicities as if the only difference between them were their race/ethnicity.

Preliminary analyses suggested that wage patterns differed meaningfully across the three Workforce Boards. To better capture these regional differences, we conducted separate regression models for each Workforce Board (Greater Dallas, North Central Texas, and Tarrant County), and compared results across the three areas.

The regression models included the following educator predictors: race/ethnicity (White, Black, Hispanic, Other^a), classroom role (lead, assistant, or floater/rotating assistant), highest level of education (high school diploma, equivalent, or less; some college, no degree; CDA; associate's degree; or bachelor's degree or above), and years of child care experience (less than 1 year, 1-5 years, 6-10 years, 11-20 years, or over 20 years). The regression models also included the following program predictors: number of current educators employed at the program and subsidy acceptance (yes or no).

The wage analysis results represent observed data from the sample and are not representative of the population.

Sample Representativeness

To inform our analysis for each research objective, we assessed the representativeness of the North Texas Survey Sample. We compared program-level characteristics from Texas's licensing data for programs in the survey sample to those of all programs in the North Texas population of child care providers. The survey achieved strong participation across

^a The Other race/ethnicity category included staff from groups which were too small to analyze on their own: Asian (n=134), Native American or Alaska Native (n=5), Native Hawaiian or "Other" Pacific Islander (n=12), Arab or Middle Eastern (n=73), and Multiple Races (n=9).

North Texas, and the resulting sample is largely representative of the population of child care providers in the region

Where we found significant differences, they indicated areas where the survey sample overrepresented or underrepresented certain types of programs. Specifically, we found that the survey underrepresented home-based programs and overrepresented center-based programs, which resulted in an overrepresentation of programs that accept subsidies and programs with a licensed capacity of 51-100 children. The proportion of directors who responded to the survey was comparable to the proportion of providers across Workforce Boards and age groups served.

These differences between our survey sample and the full population were considered or adjusted for in our analysis; however, child care programs and directors may differ on other, unmeasured characteristics. Table 1 contains a subset of these comparisons between the North Texas Survey Sample (described above) and the full program population (i.e., all survey-eligible North Texas programs).

Table 1: Comparison of Survey Sample to North Texas's Child Care Program Population

Variable	Category	Full Program Population (%)	North Texas Survey Sample (%)
Sample Size		3,108	558
Program Type	Home-Based	1,126 (36%)	163 (29%)**
	Center-Based	1,982 (64%)	395 (71%)**
Workforce Board	Greater Dallas	939 (30%)	158 (28%)
	North Central Texas	1,331 (43%)	239 (43%)
	Tarrant County	838 (27%)	161 (29%)
Accepts Subsidies	Yes	1,496 (48%)	363 (65%)***
Licensed Capacity	13-50	222 (7%)	37 (7%)
	51-100	502 (16%)	135 (24%)*
	101-150	445 (14%)	95 (17%)
	151-200	355 (11%)	63 (11%)
	201+	456 (15%)	65 (12%)
Ages Served	Infants	2,623 (84%)	486 (87%)
	Toddlers	3,037 (98%)	548 (98%)
	Preschoolers	3,090 (99%)	556 (100%)
	School Age	2,905 (93%)	529 (95%)

Source: 2024 North Texas Director Survey. The Prenatal-to-3 Policy Impact Center, 2025. Texas Health and Human Services Commission, 2024.. Note: * $p < 0.05$, ** $p < 0.01$, *** $p < 0.001$. Characteristics tested but not shown: county, days of operation, drop-in care, night care, accreditation.

Chapter 3. North Texas Early Childhood Educator Workforce Size & Characteristics

This chapter provides a detailed examination of the current size and composition of the early care and education workforce in North Texas. Specifically, we provide three key estimates across the region's three Workforce Boards: 1) the current number of educators; 2) the number of educators needed if existing programs were fully staffed; and 3) the difference between the two. All estimates reflect the full population of 3,108 licensed child care centers, licensed child care homes, and registered child care homes operating in the North Texas region. Estimates are based on the Early Care and Education (ECE) Workforce Sample described in Chapter 2. A full set of findings for this chapter, including confidence intervals, is available in Appendix A.

Approximately 27,312 early childhood educators currently work in North Texas

The current North Texas ECE workforce includes approximately 27,312 early childhood educators across 3,108 child care programs. Of these, 25,608 educators work in North Texas's 1,982 licensed child care centers. Among center-based educators, an estimated 59 percent (15,216 educators) hold a lead teacher role, and 41 percent (10,392 educators) hold an assistant teacher or floater role.

The remaining 1,704 early childhood educators work in home-based child care programs, comprising approximately 6 percent of the region's ECE workforce. In North Texas, 1,126 owners-educators operate home-based child care programs. Approximately 49 percent of home-based owner-educators employ one to five additional part- or full-time staff, totaling an estimated 578 home-based educators who support their programs. The first column of Table 2 shows the current North Texas Workforce count estimates (see Table 4 for workforce count estimates by Workforce Board).

Table 2: North Texas Workforce Count Estimates

Program Type	Current Educators	Total Educators if Fully Staffed	Additional Educators Needed to Maximize Capacity
North Texas Region	27,312	37,651	10,339
Centers: All Educators	25,608	35,128	9,520
Centers: Lead	15,216	--	--
Centers: Assistant/Floater	10,392	--	--
Homes: All Educators	1,704	2,523	819
Homes: Educators	578	1,397	819
Homes: Owner-Educators	1,126	1,126	0

Source: The Prenatal-to-3 Policy Impact Center, 2025. Notes: We estimated workforce counts using the Current Educator Subsample and the Fully Staffed Subsample data. Results were extrapolated to represent the estimated full population of approximately 27,312 educators across program types. Fully-staffed totals reflect providers' preferred staffing and enrollment levels.

In addition to the licensed and registered child care home- and center-based programs that make up the region's ECE workforce, we estimate that 6,826 public pre-K teachers and public pre-K paraprofessionals currently work in North Texas. Public pre-K teachers and paraprofessionals account for approximately 20 percent of the region's current ECE workforce (see Table 3).

Table 3: 2023–2024 Public Pre-K Educator Count by Workforce Board

Workforce Board	Current Educators
North Texas Region	6,826
Greater Dallas	3,004
North Central Texas	1,966
Tarrant County	1,856

Source: US Department of Education, NCES, CCD, 2024. Note: Public pre-K teacher counts are based on full-time equivalents (FTEs), which may represent multiple individuals. To account for paraprofessionals, we doubled the reported FTEs, assuming one additional staff member typically supports each educator.

Current North Texas providers require an estimated 10,339 additional early childhood educators to be fully staffed and fully enrolled

According to our estimates, if North Texas center- and home-based programs were fully staffed and fully enrolled, based on self-reported ideal enrollment and staffing levels, current child care programs would need a total of approximately 37,651 early childhood educators (see the second column of Table 2). The region currently employs an estimated 27,312 early childhood educators. Therefore, existing programs would need an additional 10,339 early childhood educators, or a 38 percent increase in the ECE workforce, to maximize capacity (see the third column of Table 2).^b

The estimated number of additional early childhood educators needed to maximize program capacity varies by program type. If North Texas's center-based programs were fully staffed and fully enrolled, center-based programs would need a total of approximately 35,128 early childhood educators. Center-based programs currently employ an estimated 25,608 early childhood educators. As such, estimated full enrollment in center-based programs would necessitate an additional 9,520 educators, or a 37 percent increase in the region's center-based ECE workforce.

If home-based programs in the region were fully staffed and fully enrolled, home-based programs would need an additional 819 early childhood educators to maximize capacity, representing a 142 percent increase over the region's current number of non-owner-educators working in home-based settings (see Table 2 for full workforce estimates by program type).

^b In this scenario, "maximum capacity" refers to the number of children a provider would ideally choose to serve, based on responses to our survey. This value reflects the provider's preferred or ideal enrollment level and may differ from their licensed capacity and is more staff-intensive than the current child-to-staff ratio.

Greater Dallas has the largest educator gap, with 4,736 additional educators needed for current providers to be fully staffed and fully enrolled

The overall number and percentage of additional early childhood educators needed vary across the three Workforce Boards, with Greater Dallas needing the most additional educators to be fully staffed compared to North Central Texas and Tarrant County (see the third column of Table 4).

If fully staffed and fully enrolled, the Greater Dallas Workforce Board's current child care programs would need approximately 12,113 early childhood educators. Currently, Greater Dallas employs an estimated 7,377 early childhood educators. Maximizing enrollment for Greater Dallas programs would suggest an additional 4,736 educators, a 65 percent increase over the current ECE workforce. Estimates of the total and additional number of educators needed if programs were fully staffed and operating at maximum capacity reflect overall staffing needs and are not broken out by teacher role, based on the structure of the survey.

Table 4: North Texas Workforce Count Estimates, by Workforce Board

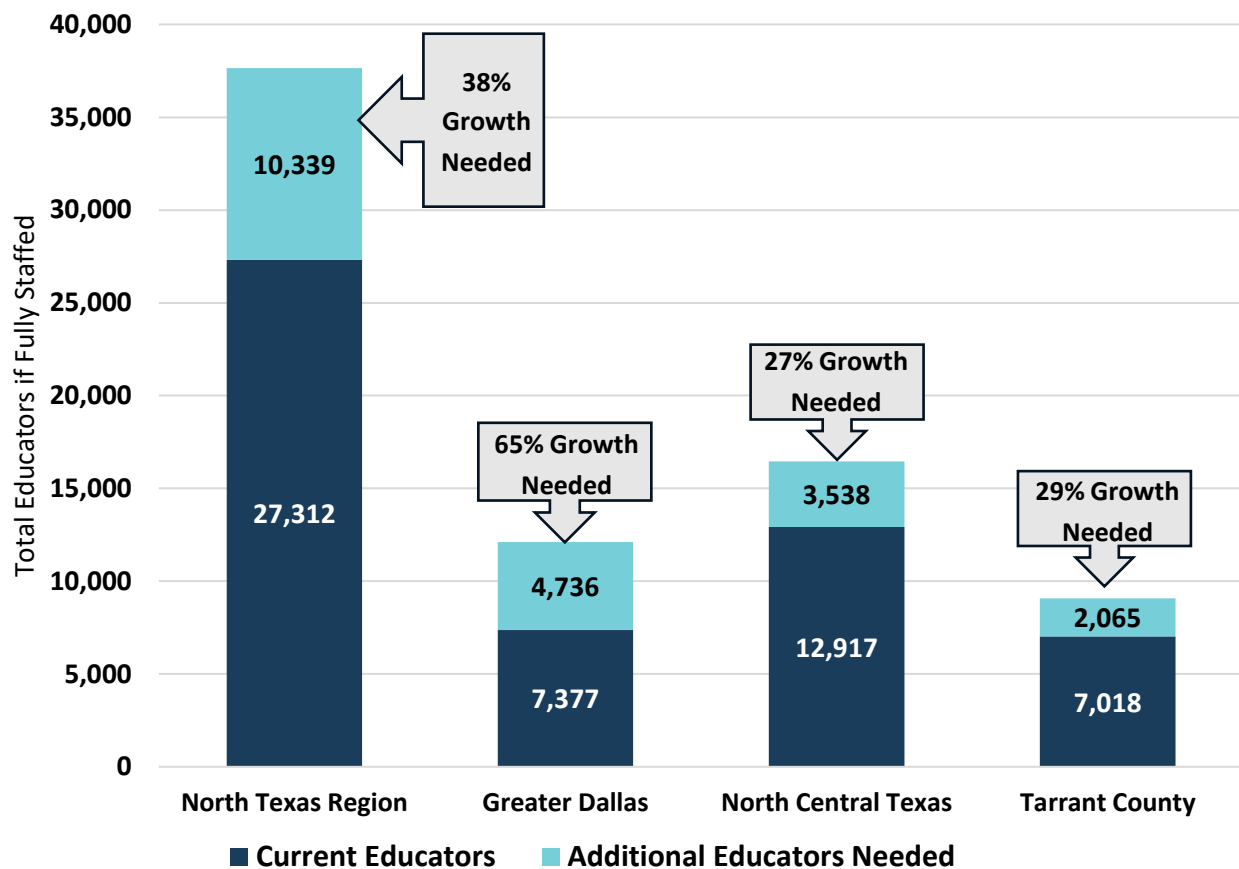
Program Type	Current Educators	Total Educators if Fully Staffed	Additional Educators Needed to Maximize Capacity
Greater Dallas	7,377	12,113	4,736
Centers: All Educators	6,982	11,358	4,376
Centers: Lead	4,165	--	--
Centers: Assistant/Floater	2,817	--	--
Home: All Educators	395	755	360
Homes: Educators	84	444	360
Homes: Owner-Educators	311	311	0
North Central Texas	12,917	16,455	3,538
Centers: All Educators	12,203	15,442	3,239
Centers: Lead	7,176	--	--
Centers: Assistant/Floater	5,027	--	--
Homes: All Educators	714	1,013	299
Homes: Educators	237	536	299
Homes: Owner-Educators	477	477	0
Tarrant County	7,018	9,083	2,065
Centers: All Educators	6,423	8,328	1,905
Centers: Lead	3,875	--	--
Centers: Assistant/Floater	2,548	--	--
Home: All Educators	595	755	160
Homes: Educators	257	417	160
Homes: Owner-Educators	338	338	0

Source: The Prenatal-to-3 Policy Impact Center, 2025. Notes: We estimated workforce counts using the Current Educator Subsample and the Fully Staffed Subsample data. Results were extrapolated to represent the estimated full population of approximately 27,312 educators across program types. Fully-staffed totals reflect providers' preferred staffing and enrollment levels.

If fully staffed and fully enrolled, the North Central Texas Workforce Board's current child care programs would need approximately 16,455 early childhood educators. Currently, North Central Texas employs an estimated 12,917 early childhood educators. To reach maximum enrollment, North Central Texas's ECE workforce would need to grow by 3,538 educators, representing a 27 percent increase over current staffing levels.

In Tarrant County, fully enrolling existing programs would require a 29 percent increase in the ECE workforce. We estimate that an additional 2,065 educators would be needed to supplement the current workforce estimate of 7,018 educators if Tarrant County were fully staffed at 9,083 early childhood educators.

Figure 1 shows current and additional educator estimates for the North Texas region and each Workforce Board to illustrate the estimated scale of workforce growth providers require to maximize capacity at current programs.

Figure 1: Workforce Growth Needed to Fully Staff Existing Child Care Programs

Source: The Prenatal-to-3 Policy Impact Center, 2025. Notes: We estimated workforce counts using the Current Educator Subsample and the Fully Staffed Subsample data. Results were extrapolated to represent the estimated full population of approximately 27,312 educators across program types. Fully-staffed totals reflect providers' preferred staffing and enrollment levels.

Estimates of a fully staffed workforce reflect only the (ideal) additional educators needed for current programs to maximize their (self-described) capacity. This study does not assess whether the existing supply of providers is sufficient to meet regional demand for child care. As a result, these estimates do not account for additional educators who may be needed to support new programs or educators needed to expand access in locations with unmet demand for child care. The true size of the workforce needed to meet demand across North Texas may be substantially larger.

The racial and ethnic makeup of center-based early childhood educators varies widely by Workforce Board and program type

In Greater Dallas, educators are most evenly distributed across racial and ethnic groups. A little over one-third (35%) of Greater Dallas educators are Hispanic, one-third (33%) are Black, and the remaining educators are White (17%) or of another racial and ethnic background (15%).

In both North Central Texas and Tarrant County, the largest share of educators are White, comprising 54 percent of educators in North Central Texas and 41 percent in Tarrant County, followed by Hispanic and Black educators. Table 5 provides a full description of the race and ethnicity of the ECE workforce by Workforce Board.

Due to small sample sizes, we did not examine variation in race and ethnicity by Workforce Board for home-based programs. However, most home-based educators identify as Black (55%), highlighting differences in the racial and ethnic composition of the workforce between center-based and home-based programs.

Table 5: Racial and Ethnic Composition of the ECE Workforce, by Program Type and Workforce Board

		North Texas Region	Greater Dallas	North Central Texas	Tarrant County
Center-Based Educators	White	41%	17%	54%	41%
	Black	22%	33%	13%	26%
	Hispanic	26%	35%	20%	27%
	Other	12%	15%	12%	7%
Home-Based Educators	White	24%	--	--	--
	Black	55%	--	--	--
	Hispanic	17%	--	--	--
	Other	4%	--	--	--

Source: The Prenatal-to-3 Policy Impact Center, 2025. Notes: We estimated workforce demographic characteristics using data from 2,772 sampled educators across 395 child care programs. Results were extrapolated to represent the estimated full population of approximately 27,312 educators across program types.

Educational attainment and credentialing among center-based early childhood educators are similar across Workforce Boards, with most holding no degree beyond high school and not holding a CDA credential

Estimates of educational attainment and credentialing among center-based early childhood educators across the three Workforce Boards closely match region-wide patterns for center-based educators in North Texas. Across the region, we estimate that more than two-thirds (69%) of center-based educators hold no degree beyond a

high school diploma, whereas approximately 24 percent hold a bachelor's degree or higher. These estimates align closely with previous regional estimates from the 2022 Texas Child Care Workforce Strategic Plan, which reported that 20 percent of center-based educators hold a bachelor's degree or higher.⁴⁸

Estimates of bachelor's degree attainment vary significantly across Workforce Boards. Tarrant County has the lowest estimated share of educators with a bachelor's degree or higher (18%), followed by Greater Dallas (22%) and North Central Texas (28%).

Due to small sample sizes, we did not examine variation in educational attainment and credentialing by Workforce Board for home-based programs. For North Texas, regionally, more than half (59%) of home-based educators hold no degree beyond a high school diploma, whereas 26 percent hold a bachelor's degree or higher.

See Table 6 for detailed estimates on formal education across child care program types and Workforce Boards.

Table 6: Educational Attainment of the ECE Workforce, by Program Type and Workforce Board

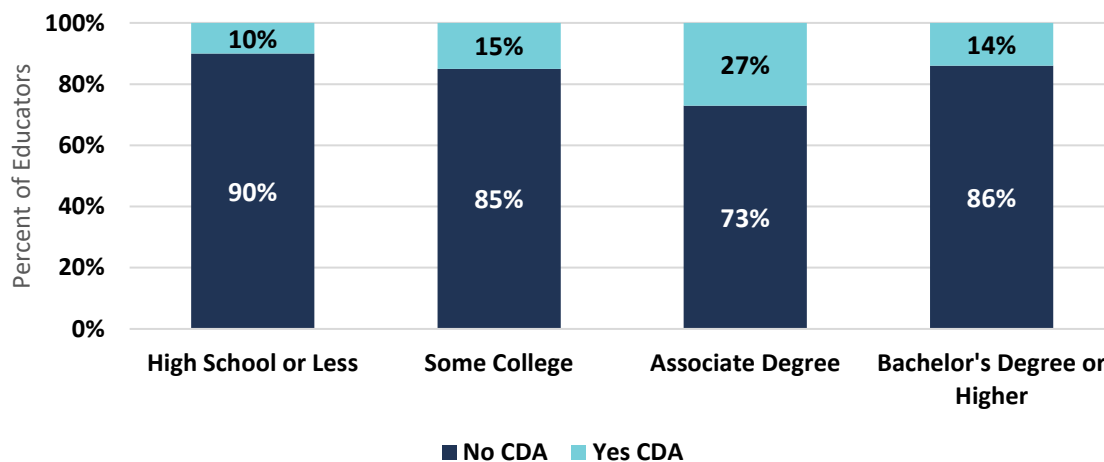
		North Texas Region	Greater Dallas	North Central Texas	Tarrant County
Center-Based Educators	Education				
	High School or Equivalent	51%	52%	51%	52%
	Some College	18%	20%	15%	22%
	Associate Degree	7%	7%	6%	9%
	Bachelor's Degree or Higher	24%	22%	28%	18%
	CDA Attainment				
	Yes	11%	16%	8%	12%
	No	82%	75%	86%	82%
	Currently Attaining	7%	10%	6%	5%
Home-Based Educators	Education				
	High School or Less	28%	--	--	--
	Some College	31%	--	--	--
	Associate Degree	16%	--	--	--
	Bachelor's Degree or Higher	26%	--	--	--
	CDA Attainment				
	Yes	25%	--	--	--
	No	65%	--	--	--
	Currently Attaining	10%	--	--	--

Source: The Prenatal-to-3 Policy Impact Center, 2025. Notes: We estimated workforce demographics using data from 2,772 sampled educators across 395 child care programs. Results were extrapolated to represent the estimated full population of approximately 27,312 educators across program types.

Few educators currently hold or are pursuing a Child Development Associate (CDA) credential, with estimates at 18 percent for center-based educators and 35 percent for home-based owner-educators and home-based educators.

Most educators do not hold a CDA credential, regardless of their level of education. Only 1 in 10 educators without a college degree holds a CDA credential (11%). Associate degree holders comprise the largest share of CDA-credentialed educators (27%), and 14 percent of educators with a bachelor's degree or higher also hold a CDA credential (see Figure 2).

Figure 2: CDA Credential Attainment by Education Level for Educators

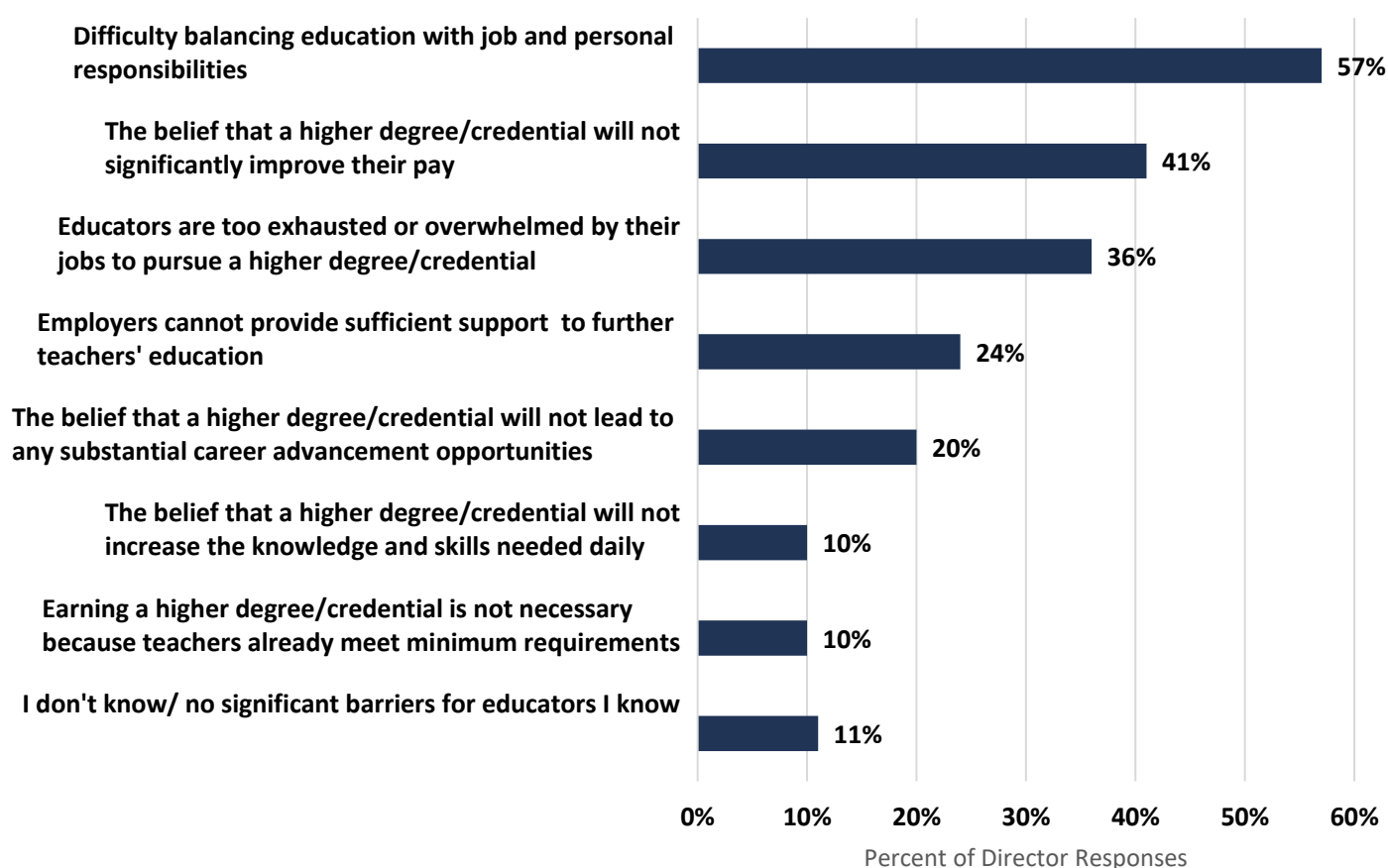


Source: The Prenatal-to-3 Policy Impact Center, 2025. Notes: We estimated CDA credentialing among educators with different levels of education from 2,607 sampled educators. Results were not extrapolated to the full population.

Program directors reflected on what they believe holds educators back from pursuing additional education or credentials. Directors most often cite two perceived key barriers to attaining an additional degree or credential: the belief that educators will have difficulties balancing the pursuit of more education with their current job and personal responsibilities (57%), and the belief that earning a credential or degree would not significantly improve their pay (41%).

See Figure 3 for a comprehensive description of the structural and motivational barriers that directors believe influence workforce development efforts.

Figure 3: What Barriers Directors Believe Prevent Early Childhood Educators from Pursuing a Higher Degree or Credential Besides Cost



Source: 2024 North Texas Director Survey. The Prenatal-to-3 Policy Impact Center, 2025. Notes: n=391 center-based programs and n=158 home-based programs. Not shown are "Other" responses.

Early childhood educators in centers have similar experience levels across Workforce Boards. At the median, home-based educators have 12 years of experience, and center-based educators have 4 years

Estimates of experience levels among center-based early childhood educators across the three Workforce Boards closely match region-wide patterns for center-based educators in North Texas. At the median, center-based educators in North Texas have 4 years of experience in the ECE workforce. In North Texas, approximately 60 percent of educators have 5 years or less of experience in the field of ECE, and 22 percent have 10 years or more in the ECE workforce.

Because of small sample sizes, we did not examine the variation in experience levels by Workforce Board for home-based programs; however, at the median, home-based educators have 12 years of experience in the ECE workforce. In North Texas, we estimate that 54 percent of home-based owner-educators and home-based educators have 10 or more years of experience in early childhood, and just 23 percent have fewer than 5 years of experience.

See Table 7 for detailed estimates of years of experience across child care program types and Workforce Boards.

Table 7: Years of Experience of the ECE Workforce, by Program Type and Workforce Board

		North Texas Region	Greater Dallas	North Central Texas	Tarrant County
Center-Based Educators	0-5 Years	60%	58%	61%	59%
	6-10 Years	18%	18%	19%	18%
	11-20 Years	15%	16%	14%	16%
	21+ Years	7%	8%	6%	8%
Home-Based Educators	0-5 Years	23%	--	--	--
	6-10 Years	23%	--	--	--
	11-20 Years	23%	--	--	--
	21+ Years	31%	--	--	--

Source: 2024 North Texas Director Survey. The Prenatal-to-3 Policy Impact Center, 2025. Notes: We estimated workforce demographics using data from 2,772 sampled educators across 395 child care programs. Results were extrapolated to represent the estimated full population of approximately 27,312 educators across program types.

Conclusion

The North Texas ECE workforce includes an estimated 27,312 educators across licensed child care centers, licensed child care homes, and registered child care homes. Fully staffing existing programs to maximize capacity, based on providers' ideal enrollment and staffing levels, would require approximately 10,339 additional educators, with the most growth needed in Greater Dallas. Although education level and years of experience among educators are relatively consistent across Workforce Boards, home-based educators tend to have more years of experience than center-based educators. The racial and ethnic composition of the workforce not only varies by program type, but also by Workforce Board. Regional estimates obscure important local variation.

These baseline estimates of the size, composition, and staffing needs of the ECE workforce are essential for designing a strategic plan to strengthen, expand, and sustain a thriving, high-quality early care and education workforce as North Texas grows.

Chapter 4. Child Care Supply Across North Texas

This chapter examines current enrollment, open slots, and fully-staffed capacity across regulated child care in North Texas. Specifically, we provide the following estimates about child care supply for children ages birth to 5 years old: 1) the number of children enrolled in child care and served by public pre-K (current enrollment); 2) the number of current open child care slots (i.e., the additional children programs could enroll “today”); 3) the current actual capacity of child care programs (i.e., current enrollment plus open slots); and 4) fully-staffed capacity (i.e., the maximum number of children that current programs could serve if they were fully staffed and resourced).

All estimates reflect the full population of 3,108 licensed child care centers, licensed child care homes, and registered child care homes operating in the North Texas region, with estimates based on the Child Care Supply Sample described in Chapter 2.

An estimated 117,661 children ages birth to 5 years old are currently enrolled in child care programs across North Texas

North Texas is home to 514,627 children under the age of 5 years old. According to our estimates, 117,661 children in the birth to 5 age range are currently served in the 3,108 center- and home-based child care programs across North Texas (see Table 8). The vast majority (94%) of these children are enrolled in centers, with the remaining (6%) served by child care homes.

Table 8: North Texas Child Care Supply Estimate, Ages Birth to 5

	Current Enrollment	Current Open Slots	Actual Capacity (Enrollment + Slots)	Percent of Current Enrollment Subsidized
North Texas Region	117,661	49,852	167,513	21%
Center-Based	110,419	44,582	155,001	
Home-Based	7,242	5,270	12,512	
Greater Dallas	32,245	12,807	45,052	41%
Center-Based	30,690	11,306	41,996	
Home-Based	1,555	1,501	3,056	
North Central Texas	56,661	23,677	80,338	11%
Center-Based	53,417	21,497	74,914	
Home-Based	3,244	2,180	5,424	
Tarrant County	28,755	13,368	42,123	19%
Center-Based	26,312	11,779	38,091	
Home-Based	2,443	1,589	4,032	

Source: The Prenatal-to-3 Policy Impact Center, 2025. Notes: We estimated child care supply using the Current Enrollment Subsample and the Actual Capacity Subsample. Results were extrapolated to represent the estimated full population of children served across North Texas’s 3,108 programs.

Twenty-one percent of slots are filled by children who use subsidies, including 11% of the slots in North Central Texas, 19% in Tarrant County, and 41% in Greater Dallas (see Table 8).

Current enrollment varies widely by age, with infants occupying the fewest slots (20,407 slots), followed by toddlers (41,443 slots) and then preschoolers (55,811 slots) (see Appendix B for age group enrollment breakouts).

In addition to the approximately 118,000 children served by center- and home-based programs, 68,587 children are enrolled in public pre-K. Public pre-K children account for approximately 37 percent of the region's children currently enrolled in formal child care (see Table 9).

Table 9: 2023-2024 Public Pre-K Child Count by Workforce Board

Workforce Board	Current Enrollment
North Texas Region	68,587
Greater Dallas	28,332
North Central Texas	21,488
Tarrant County	18,767

Source: US Department of Education, NCES, CCD, 2024.

Considering regulated child care and public pre-K, in total, 186,248 children aged birth to 5 years old are currently served by the North Texas ECE system. North Texas is home to 514,627 children ages birth to 5, meaning that approximately 36 percent of children in this age range are enrolled in formal child care or public pre-K.

Among the more than half a million children ages birth to 5 living in the region, an estimated 65 percent, or approximately 334,509 children, come from households in which all parents in the household are working. We do not know the extent to which the 186,248 children currently served by the ECE system in North Texas have all parents in the workforce (and surely, some percent do not). For illustrative purposes, however, assuming all children served by ECE in North Texas had all parents working, formal child care and public pre-K would currently be serving 56 percent of children ages birth to 5 with all parents in the workforce.

North Texas Fast Facts

Of children birth to 5 enrolled in regulated child care:

- 94% use center-based care
- 21% use subsidies
- 17% are infants

Child care programs currently have capacity to serve 167,513 children ages birth to 5 years old, with 70 percent of capacity currently in use

We estimate that North Texas has the capacity to serve 167,513 children birth to 5 years old, or approximately 33 percent of the total population of children birth to 5, through regulated center- and home-based child care programs today if every available slot were filled (i.e., actual capacity). With 49,852 open slots for children birth to 5 years old, child care providers across the region overall report serving approximately 70 percent of their current actual capacity (see the second column of Table 8 for the number of current open slots by Workforce Board and care type). Open slots represent child care seats that a provider is willing to fill immediately; therefore, these results indicate that 30 percent of all regulated child care seats across North Texas are currently vacant.

The percentage of open slots out of current actual capacity varies across age groups and Workforce Boards. At the low end, 26 percent of toddler slots are open in Greater Dallas, and at the high end, 32 percent of preschool slots are open in Tarrant County (see Appendix B for age group breakouts).

These findings suggest that overall, the region has substantial capacity that is not currently being used. However, this research does not fully address how open slots are distributed across the region or consider how families' needs and preferences align with the specific slots that are open.

Looking more closely at infant slots, which are typically considered to be the most limited, among relevant survey respondents (n=393), 66 percent of directors reported at least one open infant slot on the survey. The remaining 34 percent of providers have no open slots for infants. Among the 260 child care providers that reported at least one open infant slot, most providers have between one and eight open infant slots, with a median of five open infant slots. These trends are not meaningfully different across the Workforce Boards.

Slots may remain open because they are not in a neighborhood or area where additional care is needed, the program may not be open when families need child care, or families in the area where the provider is located may not be able to afford the tuition prices at the provider. Understanding that each provider only has a few open slots at a given time underscores this point; openings may not be in the right place at the right time to meet families' needs. It is also possible that a lack of child care access in this region stems more from an inability for families to afford the child care slots that are available.

Additional research is needed to better understand these contributing factors. Seemingly, the availability of open slots suggests that supply is not a primary challenge for child care. However, research consistently demonstrates families' difficulty accessing care and the negative impacts of child care challenges on workforce participation and career advancement.⁴⁹ These discrepancies underscore the need to better understand potential differences between open slots and families' ability to

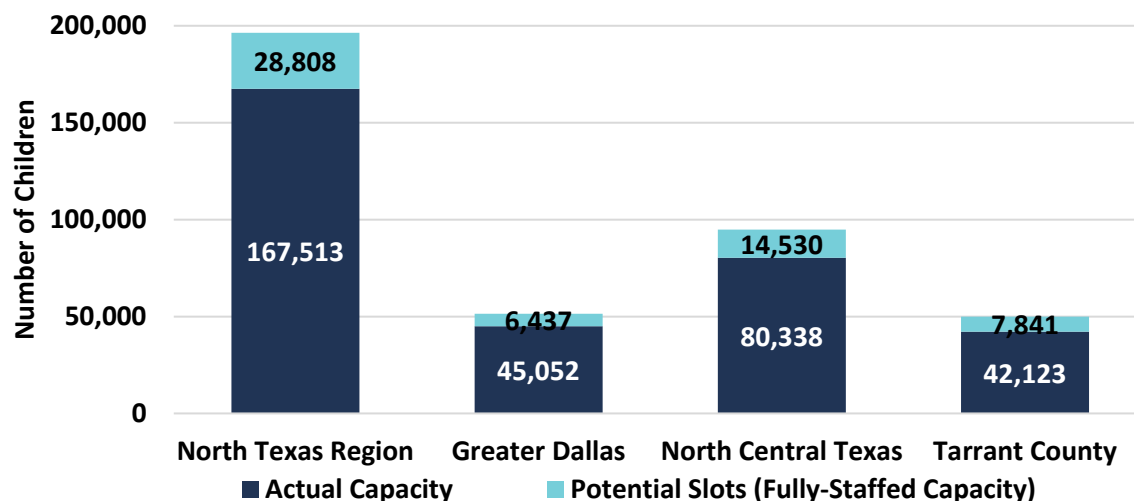
access these slots, as well as to better understand the overall unmet demand for child care in North Texas.

If fully staffed, child care programs could serve 196,321 children, approximately 29,000 more than the current workforce can accommodate

We estimate that, if North Texas child care programs were fully staffed and fully enrolled, based on self-reported ideal enrollment and staffing levels, current programs could serve approximately 196,321 children ages birth to 5 years old (i.e., fully-staffed capacity). Specifically, providers report the potential to serve approximately 29,000 additional children, 17 percent more than the current actual capacity, if today's programs had sufficient staff (10,339 additional educators) and resources (see Figure 4). Maximizing enrollment at these reported levels is more staff-intensive than today's current actual capacity, where programs serve 167,513 children with 27,312 educators (see Table 2).^c

The number of additional children in the birth to 5 age range that each Workforce Board could serve if fully staffed varies widely, from 6,437 more children in Greater Dallas to 14,530 additional children in North Central Texas. However, as a percentage of children currently able to be served, the number of potential new slots appears to vary less, ranging from 14 percent more slots in Greater Dallas to 19 percent more slots in Tarrant County.

Figure 4: Estimated Fully-Staffed Capacity: Summing Actual Capacity and Additional Potential Slots, Ages Birth to 5



Source: The Prenatal-to-3 Policy Impact Center, 2025. Notes: We estimated child care supply using the Actual Capacity and Fully-Staffed Capacity Subsamples. Results were extrapolated to represent the estimated full population of children served across North Texas's 3,108 programs. Fully-staffed totals reflect providers' preferred staffing and enrollment levels.

^c At today's current actual capacity ratio (~6.1 children per educator), serving 28,808 additional children would require approximately 4,723 additional educators, compared to 10,339 at provider-reported fully-staffed levels.

Among center-based programs specifically, we assess how potential slots vary across age groups. Overall, across Workforce Boards and age groups, if programs maximized enrollment and were fully staffed, center-based programs could serve 18 percent more children than their current actual capacity. The proportion of additional slots varies by Workforce Board and age groups:

- In Greater Dallas, providers would offer 9 percent more infant slots, 30 percent more toddler slots, and 6 percent more preschool slots.
- In North Central Texas, providers would offer 13 percent more infant slots, 20 percent more toddler slots, and 21 percent more preschool slots.
- In Tarrant County, providers would offer 23 percent more infant slots, 24 percent more toddler slots, and 19 percent more preschool slots.

See Appendix B for child care supply by age group and Workforce Board.

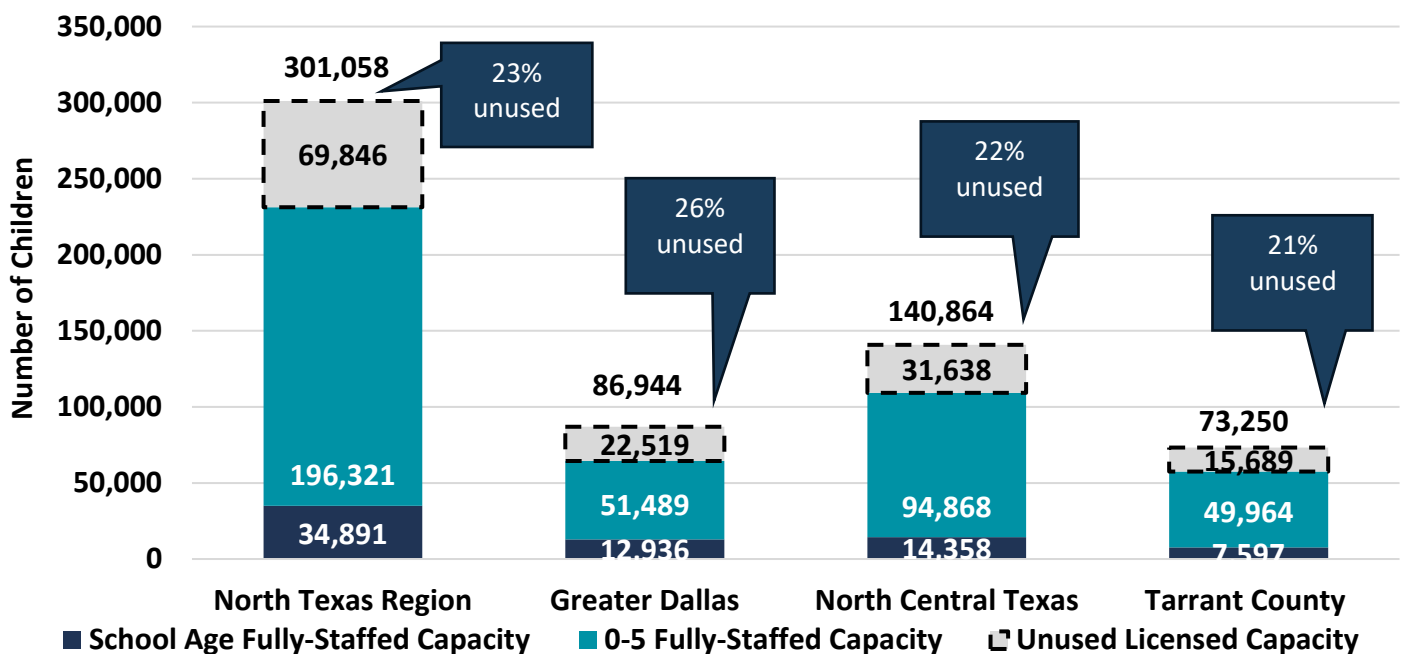
Even if fully staffed, current providers would only offer enough slots to represent 77 percent of total licensed capacity

If providers were fully staffed and maximized their capacity to serve children, directors report that, generally, their programs' fully-staffed capacity is considerably less than their licensed capacity. Fully-staffed capacity as a percentage of licensed capacity ranges from 74 percent in Greater Dallas to 79 percent in Tarrant County (see Appendix B). Current enrollment represents only 48 percent of licensed capacity across the region, with similar rates across Workforce Boards.

Figure 5 displays fully-staffed capacity alongside licensed capacity; because licensed capacity is not subdivided by age groups, we show the fully-staffed capacity for ages birth to 5 as well as the fully-staffed capacity directors reported for school-age children (e.g., before- and after-school care). Regulated child care in North Texas is licensed to serve 301,058 children. Current providers, even if fully staffed, could only serve approximately 231,255 children of all ages, or 77 percent of the total licensed capacity. In other words, approximately one-quarter of licensed capacity would remain unused. Across Workforce Boards, a sizeable portion of total licensed capacity would not be used by providers even when fully staffed.

Directors' reports of fully-staffed capacity include considerations of how they would choose to allocate space across age groups, class size preferences, and educator-to-child ratio decisions. Programs may choose to serve fewer children than they are licensed to for a number of reasons, including choosing to have smaller class sizes or educator-to-child ratios than the minimum state requirements.

Figure 5: Fully-Staffed Capacity and Total Licensed Capacity, All Ages



Source: The Prenatal-to-3 Policy Impact Center, 2025. Texas Health and Human Services Commission, 2024.

Fully-staffed totals reflect providers' preferred staffing and enrollment levels.

The North Texas early childhood education system could serve a maximum of 79 percent of children ages birth to 5 years who live in households where all parents are in the workforce

Even when combining all currently available child care slots in center- and home-based programs with public pre-K enrollment (i.e., actual capacity plus public pre-K), approximately 71 percent of the region's children under age 5 with all available parents in the workforce could be served (see the fourth column in Table 10). If fully staffed, a maximum of 79 percent of children with all available parents in the workforce could be served by current child care providers and public pre-K (see the fifth column in Table 10).

Table 10: Potential of ECE System to Serve All Children Birth to Age 5 with Working Parents

	Children with All Parents Working	Actual Capacity + Pre-K	Fully-Staffed Capacity + Pre-K	Percent ECE Could Serve Today	Percent ECE Could Serve if Fully Staffed
North Texas Region	334,509	236,100	264,908	71%	79%
Greater Dallas	112,439	73,384	79,821	65%	71%
North Central Texas	129,612	101,826	116,356	79%	90%
Tarrant County	92,445	60,890	68,731	66%	74%

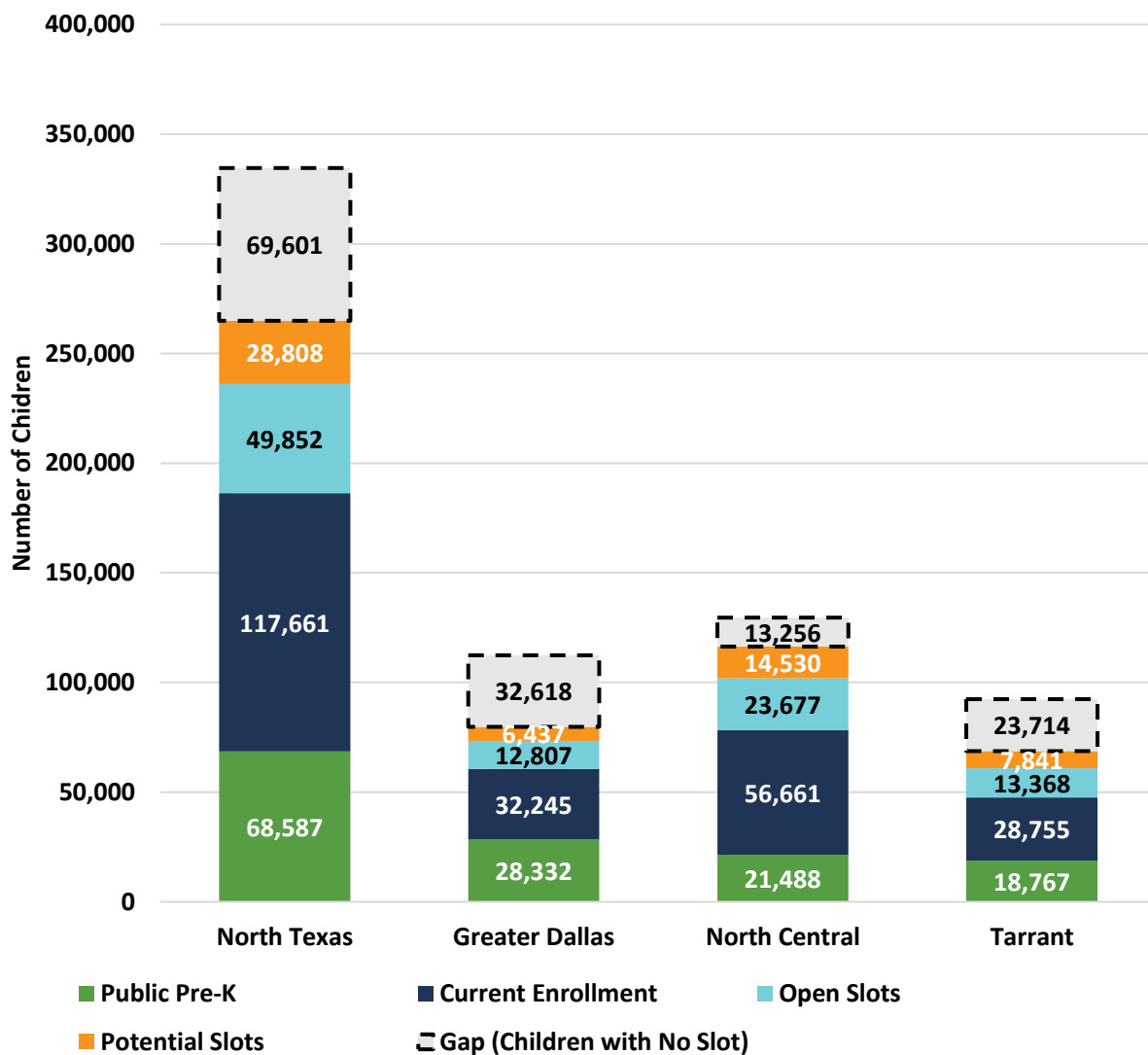
Source: The Prenatal-to-3 Policy Impact Center, 2025. US Department of Education, NCES, CCD, 2024.

The ECE system's capacity to serve children in working households differs considerably across Workforce Boards. If providers were fully staffed, the maximum percentage of children under age 5 with all parents in the workforce that the current early childhood education system could potentially serve ranges across Workforce Boards:

- Greater Dallas has the lowest estimated coverage, with approximately 71 percent of children under 5 in working-parent households potentially served if fully staffed.
- North Central Texas has the highest estimated coverage, with up to 90 percent of children under 5 in working-parent households potentially served if fully staffed.
- In Tarrant County, the current early childhood education system could serve approximately 74 percent of children under 5 with all available parents in the workforce if fully staffed.

See Figure 6 for more details on how the current ECE capacity compares to the population of children birth to 5 years old with all available parents in the workforce.

Figure 6: ECE Capacity Compared to the Population of Children with All Available Parents in the Workforce, Birth to 5 Years Old



Source: The Prenatal-to-3 Policy Impact Center, 2025. US Department of Education, NCES, CCD, 2024. Fully-staffed totals reflect providers' preferred staffing and enrollment levels.

Measuring the actual demand for formal child care is outside the scope of this study. Comparing ECE capacity to children with all available parents in the workforce is a useful benchmark to understand possible demand, but actual demand will vary. Some children whose parents are working will be in the care of other family members or close friends, or families may use a nanny or other informal child care that they prefer or that better meets their needs (i.e., for parents who work non-traditional hours). Conversely, some children who have one parent who is not in the workforce may still attend child care and/or public pre-K.

Conclusion

Across North Texas, 3,108 child care programs currently serve 117,661 children under the age of 5 years old. Combining current enrollment and open slots, programs report that they could serve up to 167,513 children ages birth to 5 at their current staffing levels, indicating that approximately 30 percent of their current actual capacity consists of open slots. If programs were fully staffed to serve the maximum number of children they would ever want to serve (their fully-staffed capacity), programs could serve up to 196,321 children ages birth to 5.

Furthermore, these child care supply results indicate that programs, even if fully staffed, would only offer enough child care slots (including school-age children) to represent 77 percent of their licensed capacity, demonstrating that both under current and fully staffed conditions, licensed capacity substantially overstates available child care supply.

Combining child care programs' current actual capacity with public pre-K enrollment, the North Texas ECE system can currently serve up to 236,100 children ages birth to 5, which represents up to 71 percent of all children birth to 5 in North Texas with all parents in the workforce. If child care programs were fully staffed, the region could serve up to 79 percent of children in the region with all parents in the workforce.

Understanding demand for child care, including the extent to which demand is currently met or unmet across North Texas, is outside the scope of the study. However, these results identify areas for further research to understand the extent to which North Texas has unmet demand for child care and identify barriers to accessing the slots that are currently open at existing child care programs.

Chapter 5. Program Characteristics and Director Experiences

Throughout the North Texas Director Survey, child care directors shared their experiences running child care programs in North Texas. The following chapter shares key findings from the North Texas Survey Sample (n=558) described in Chapter 2, highlighting directors' experiences and challenges, and identifying opportunities to increase support for the child care industry.

Most North Texas child care programs are independently owned; operate full day, Monday through Friday; and accept subsidies

The North Texas Survey Sample includes a range of child care program ownership structures and affiliations. Among center-based programs, 69 percent are independently owned, 8 percent are part of a national chain, and 7 percent are part of a local chain.^d Almost all home-based (98%) programs are independently owned.

Most programs in the sample operate full day, Monday through Friday, including 92 percent of center-based programs and 92 percent of home-based programs. Subsidy acceptance varies by program type, with 70 percent of center-based programs and 53 percent of home-based programs in the sample accepting child care subsidies.

Based on licensing data, the providers we reached are similar in size and Workforce Board distribution to the full provider population. For many provider characteristics, though, we cannot say whether these results are representative of all child care programs in North Texas or just our survey sample; relevant data are often not available at the population level.

Center-based programs and programs that accept subsidies were more likely to respond to our survey. As a result, findings may underrepresent home-based programs and non-subsidy accepting programs (see page 19 for more details).

Infants are the least-served age group and the most expensive for private-paying North Texas families, though tuition rates vary by the share of subsidized children enrolled

For families that need high-quality child care, accessibility and affordability are two major factors. Generally, child care programs in the region serve all age groups under 5 years of age, with the vast majority providing care for infants, toddlers, and preschoolers.

However, among children under age 5, infants are the least-served age group; 14 percent of center-based and 17 percent of home-based programs do not offer infant

^d Directors could select multiple ownership structures and affiliations, and therefore percentages may sum to more than 100%. Some center-based programs report additional affiliations: 17% are affiliated with a church or religious organization, 3% with a corporation, business, or hospital, 3% with a public primary or secondary school, 2% operate a state-funded pre-K classroom, and 2% are affiliated with a Head Start or Early Head Start program.

care. Because infant classrooms also require lower child-to-adult ratios and smaller class sizes, families in North Texas may have a harder time accessing infant care than care for older children.

Tuition rates reported in the North Texas Director Survey follow similar patterns to rates across Texas and nationally, with higher tuition costs for infant care compared to older age groups. In North Texas, the median monthly full-time tuition rate for infants for a private-paying family is \$1,076 for center-based programs and \$945 for home-based programs.

Center- and home-based programs charge the highest tuition rates for infant care, with costs gradually decreasing for older age groups (see Table 11). Tuition rates reported in the North Texas Director Survey were not systematically higher or lower than those of the 2024 Texas Market Rate Survey, based on a comparison of median rates to the 50th percentile of the state survey.⁵⁰

Table 11: Percent of Programs Serving Each Age and Median Monthly Tuition

	Percent of Programs Serving Age Group			Median Tuition for Age Group		
	Infants	Toddlers	Preschoolers	Infants	Toddlers	Preschoolers
Center-Based Programs	86%	97%	99%	\$1,076	\$958	\$900
Home-Based Programs	83%	94%	93%	\$945	\$836	\$800

Source: 2024 North Texas Director Survey. The Prenatal-to-3 Policy Impact Center, 2025. Note: n's range from 259-280 for center-based programs and 93-107 for home-based programs.

We identify statistically significant differences in the prevalence of serving infants among programs that accept subsidies compared to programs that do not. Infant care is more prevalent among subsidy-accepting programs, with 90 percent of subsidy-accepting programs serving infants compared to 76 percent of programs that do not accept subsidies. The prevalence of providing care for infants is similar across all three Workforce Boards.

Tuition rates are also significantly different across the three Workforce Boards. Median monthly tuition rates for infants are highest in Tarrant County programs (\$1,098), followed by North Central Texas (\$1,000) and Greater Dallas (\$980). The median tuition rate for infants in Tarrant County programs is significantly higher than both Greater Dallas and North Central Texas.

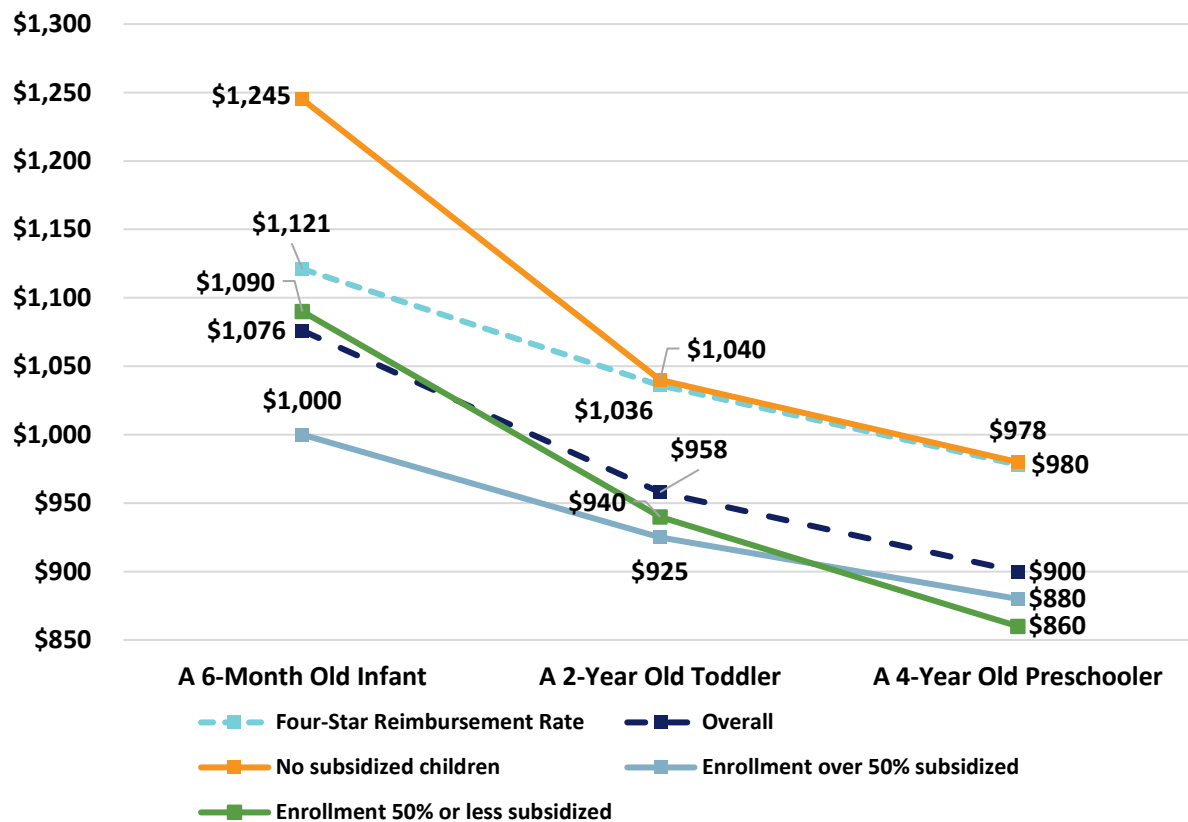
Tuition rates are lowest in programs where most children receive subsidies and higher in programs with lower rates of or no subsidy enrollment

Median tuition rates (for private-paying families) are highest in center-based programs that do not accept subsidies, and the median tuition rate for private-paying families decreases as the share of subsidized children enrolled in a program increases. Programs

that serve more children using subsidies tend to charge lower tuition rates for private-paying families. Gaps in tuition rates between programs by subsidy acceptance vary the most for infants, and the gap closes for older age groups (see Figure 7).

In center-based programs, on average across all ages, 42 percent of currently enrolled children use subsidies, and in home-based programs, 35 percent of currently enrolled children use subsidies. For infants, the median private-pay tuition is \$245 lower per month in programs where most children use subsidies compared to tuition in programs that do not accept subsidies, and \$90 lower compared to programs where fewer than half of the currently enrolled children use subsidies. Toddler and preschool private-pay tuition follows a similar pattern, though the differences are smaller.

Figure 7: Median Center Tuition Rate for Private-Paying Families, by Subsidy Status



Source: 2024 North Texas Director Survey. The Prenatal-to-3 Policy Impact Center, 2025. Texas Workforce Commission. (2024). Note: n's range from 61-280 across program and age categories. Reimbursement rates reflect daily rates for Four-Star certified Texas Rising Star (TRS) programs, full-time care, averaged across the Workforce Boards and multiplied by the typical number of working days in a month to calculate monthly estimates from daily rates.

As a result of subsidy reimbursement rate increases over the past few years, median subsidy reimbursement rates for a Four-Star certified program in North Texas (with rates averaged across Workforce Boards) are higher than median private-pay tuition

rates for most providers, except, typically, for programs that do not accept subsidies.⁵¹ When programs' private-pay tuition rates are lower than their subsidy reimbursement rate, they are reimbursed at the lower private-pay rate for their subsidy slots as well. Aligning subsidy rates with typical tuition prices likely reduces disincentives for participation in the subsidy system.

Importantly, this comparison uses median tuition rates. Federal guidance recommends setting subsidy reimbursement rates at the 75th percentile of market tuition rates, so that families with low incomes can afford access to approximately three-fourths of available child care programs.⁵² Texas has aligned its subsidy reimbursement rates with this federal standard, evidence of which can be seen in Figure 7, where Four-Star certified reimbursement rates are typically higher than median private-pay tuition rates.⁵³ However, these findings may understate gaps for families seeking higher-cost care.

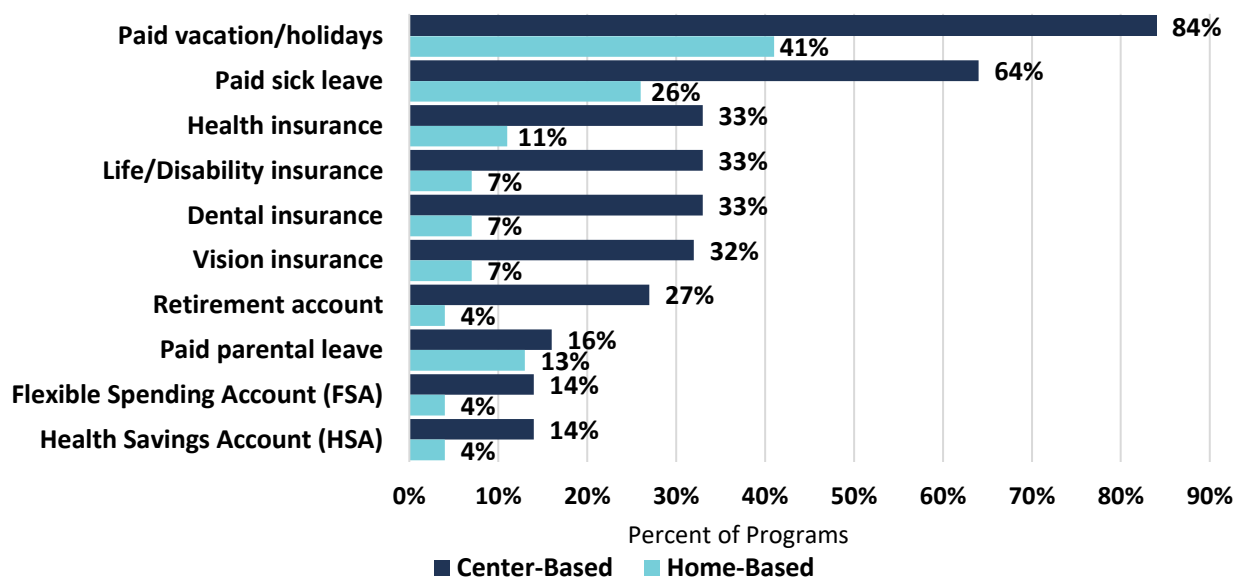
In this study of child care programs across North Texas, we do not expect the actual cost of providing child care to vary considerably across the region. Therefore, programs that charge the lowest private-pay tuition may face the greatest financial hardship and/or the narrowest profit margins. Because the prices charged by providers are constrained by what the families they serve can afford, price variation across programs likely indicates variation in income levels of families served in different programs' local area or neighborhood.

Most programs do not offer benefits such as health insurance

Access to benefits such as health, vision, dental, or life and disability insurance remains limited for full-time early childhood educators. Only one-third (33%) of center-based programs offer insurance benefits to full-time educators, and 11 percent of home-based programs offer health insurance benefits to full-time educators. Similarly, 27 percent of center-based programs and 4 percent of home-based programs offer educators access to a retirement account.

Early childhood educators often have access to paid leave benefits, such as paid vacation, holidays, and paid sick leave, although gaps remain. Most (84%) center-based programs provide paid vacation or holiday days to their full-time employees, and 64 percent offer paid sick leave. Among home-based programs, access to paid leave is more limited. Fewer than half (41%) offer paid vacation or holidays, and 26 percent offer paid sick leave. Figure 8 shows additional benefits that programs offer to full-time teaching staff.

Figure 8: Percent of Programs That Offer Benefits for Full-Time Educators

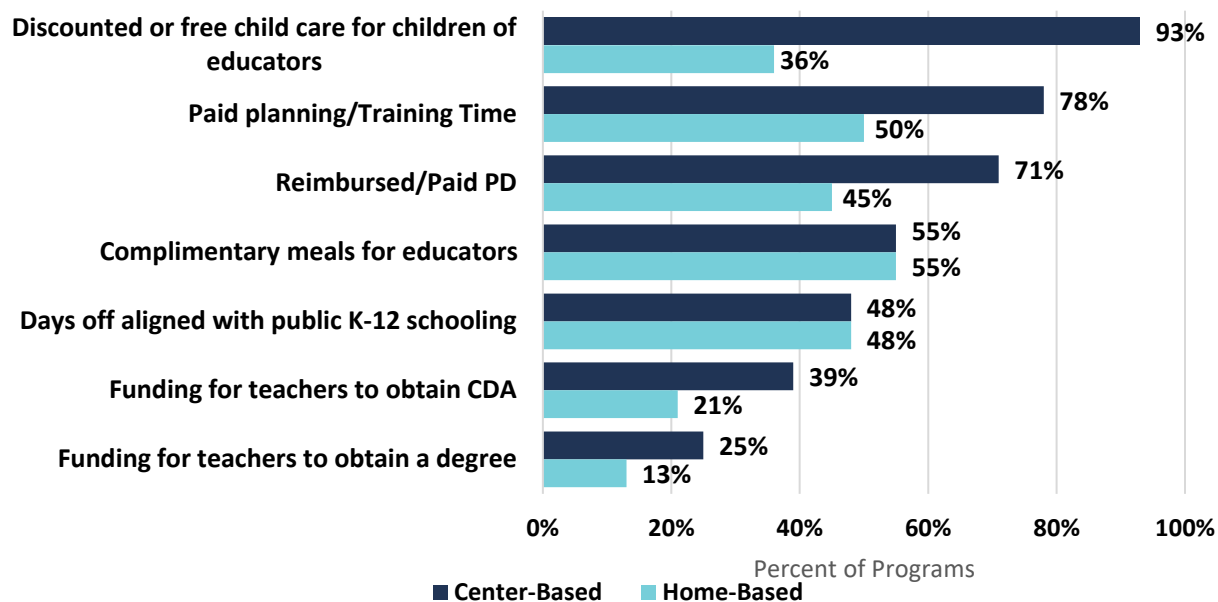


Source: 2024 North Texas Director Survey. The Prenatal-to-3 Policy Impact Center, 2025. Note: The sample is limited to programs with staff; n=363 center-based programs and n=67 home-based programs.

Compared to traditional employer-sponsored benefits (e.g., health insurance, retirement plan), child care programs more commonly offer educator-centered supports such as discounted or free child care for educators with young children, paid planning or training time, professional development reimbursement, and complimentary meals.

Among center-based programs, almost all (93%) offer free or reduced child care for the children of educators, 78 percent provide paid planning time, and 71 percent cover the cost of professional development. In home-based programs, educator-centered supports are offered less frequently. Just 36 percent of home-based programs offer free or reduced child care for the children of educators, just half (50%) provide paid planning or training time, and fewer than half (45%) cover the cost of professional development. Figure 9 details the percentage of programs offering these educator-centered supports.

Figure 9: Percent of Programs That Offer Educator-Centered Supports for Full-Time Educators

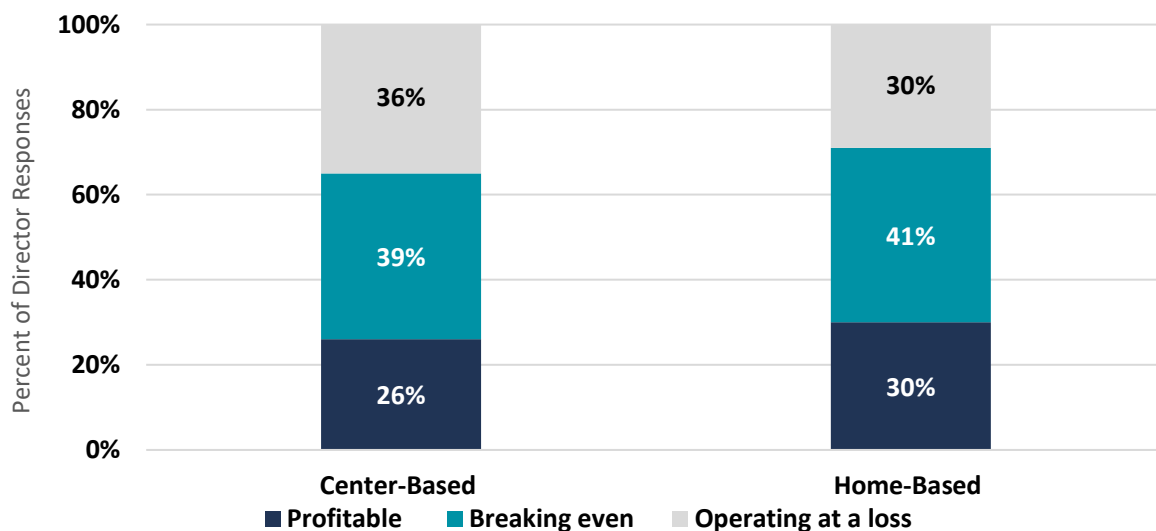


Source: 2024 North Texas Director Survey. The Prenatal-to-3 Policy Impact Center, 2025. Note: The sample is limited to programs with staff; n=369 center-based directors and n=67 home-based directors.

Child care programs face serious financial challenges, with one-third of directors currently operating at a loss

In North Texas, approximately one in four (26%) center-based directors describe their program as profitable, whereas the remaining 74 percent of directors report either just breaking even (39%) or operating at a loss (36%). As shown in Figure 10, home-based directors report similar results.

Figure 10: Child Care Programs' Current Financial Situation



Source: 2024 North Texas Director Survey. The Prenatal-to-3 Policy Impact Center, 2025. Notes: n=352 center-based programs and n=145 home-based programs. Percentages may not sum to 100% due to rounding.

Programs where most enrolled children use subsidies and, therefore, where private-pay tuition rates tend to be lowest, face particular financial challenges. Among programs with high subsidy enrollment (more than half of children), 41 percent operate at a loss, compared to 28 percent of programs that do not accept subsidies. This difference is statistically significant.

Programs' financial situations vary across Workforce Boards. In Greater Dallas, 40 percent of programs report operating at a loss, compared to 34 percent of programs in North Central Texas and 28 percent of programs in Tarrant County. Child care programs in Greater Dallas are significantly more likely to report operating at a loss than programs in Tarrant County.

More than half of directors report they will likely raise tuition in the next 6 to 12 months

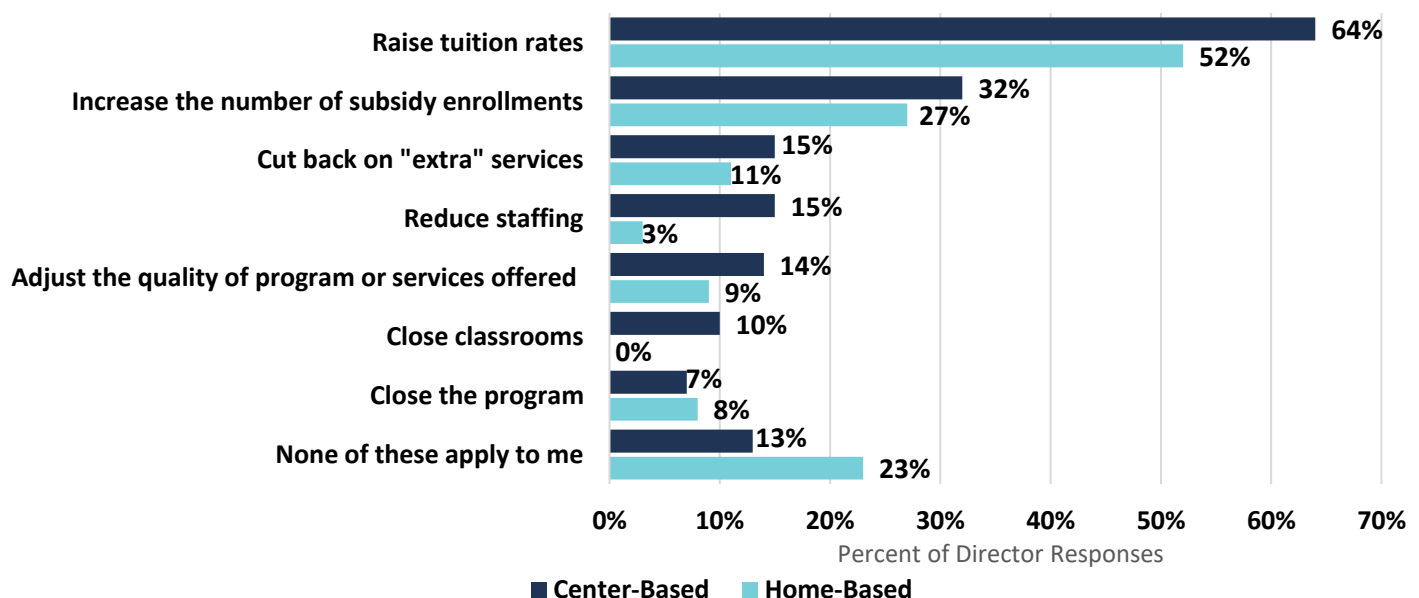
Across the region, 74 percent of child care programs are not currently profitable. Given their program's current financial and operational conditions, 64 percent of center-based directors and 52 percent of home-based directors plan on raising tuition rates in

the next 6 to 12 months. With the median reported annual tuition cost across the region already ranging from \$9,600 to \$12,912 per year for families, further tuition increases will likely exacerbate the financial burden of child care for North Texas families. Concurrently, with only 70 percent of available child care seats currently filled (Table 8), raising tuition may be challenging for programs given ongoing enrollment constraints.

To address the financial and operational conditions of their programs, many directors plan to make additional program adjustments, including enrolling more children who use subsidies and reducing “extra” services. Thirty-two percent of center-based directors and 27 percent of home-based directors plan to increase the number of children enrolled who use subsidies. Additionally, 11 to 15 percent of program directors expect to reduce or eliminate services such as vendors or special classes. Notably, 7 percent of center-based and 8 percent of home-based child care programs anticipate closing entirely, and 10 percent of center-based programs anticipate closing individual classrooms because of financial strain.

These financial realities also shape staffing decisions. Though fully staffing the existing child care programs in North Texas would require an additional 10,339 early childhood educators (see Table 2), 15 percent of center-based directors report plans to reduce staffing over the next 6 to 12 months, highlighting the persistent financial and operational challenges directors face. See Figure 11 for the full results.

Figure 11: Given Current Financial and Operational Considerations, in the Next 6 Months to 1 Year, is Your Program Likely to...



Source: 2024 North Texas Director Survey. The Prenatal-to-3 Policy Impact Center, 2025. Note: n=392 center-based programs and n=162 home-based programs. Not shown are “moving to a new location” and “reduce subsidy enrollments.”

Directors generally report that serving children using subsidies is working well for them, though areas for improvement remain

Subsidies are a key policy lever for providing financial assistance to make child care more accessible and affordable for families with low incomes that are working, enrolled in education programs, or participating in training programs. Subsidies can also serve as a lever for providers to support the financial sustainability of their child care programs.

Most child care programs that accept subsidies are willing to enroll more children who use subsidies

Across North Texas, most programs are willing to serve additional children receiving subsidies in each age group. Programs' willingness to accept more children who use subsidies is highest for toddlers and preschoolers, followed by infants and school-age children across program types (see Table 12).

Because subsidy reimbursement rates are similar to or exceed median private-pay tuition rates for most age groups at subsidy-accepting child care centers, and most providers are willing to take more subsidy enrollments, programs' willingness to accept subsidies does not appear to be a major barrier to subsidy use across the region.

Table 12: Percent of Programs Willing to Accept More Children Using Subsidies by Program Type

	Infants	Toddlers	Preschoolers	School Age
Center-Based Programs	87%	93%	94%	85%
Home-Based Programs	77%	89%	85%	69%

Source: 2024 North Texas Director Survey. The Prenatal-to-3 Policy Impact Center, 2025. Note: The sample is limited to programs that accept subsidies; n=245 center-based programs and n=64 home-based programs.

Although the vast majority of programs are willing to accept additional children using subsidies across age groups, access to child care subsidies, which are limited by available funding, remains limited for families. As of late 2024, approximately 95,000 children in Texas remain on the waitlist for subsidies, with an estimated 38 percent of those children residing in North Texas.⁵⁴ Additional families may be eligible for subsidies and interested in them, but not actively on the waitlist, and therefore, unmet demand may be even higher.

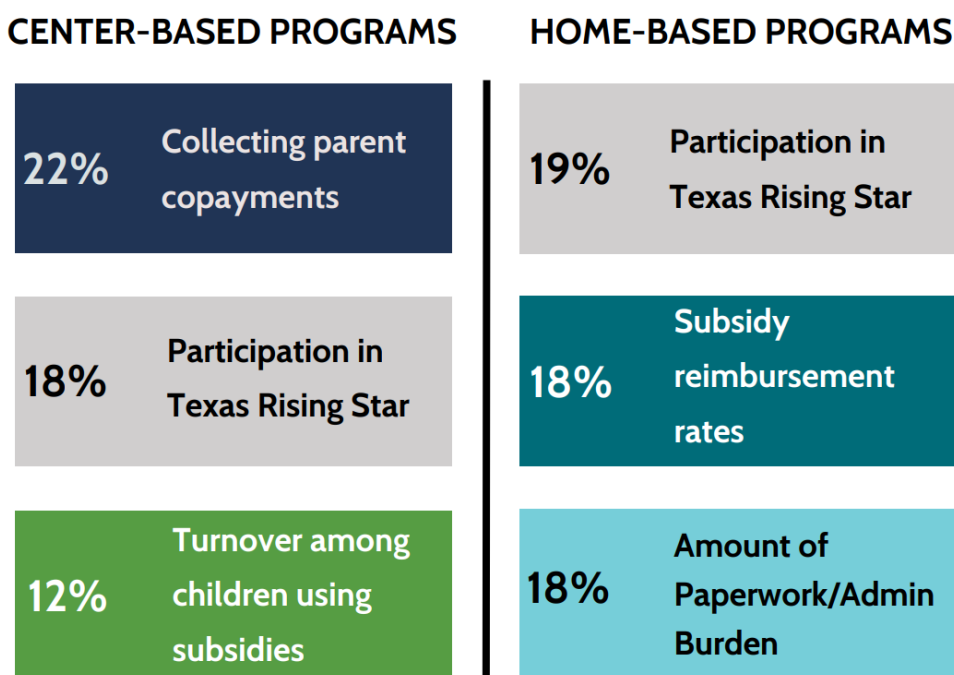
Overall, directors are fairly satisfied with the subsidy system, though key challenges remain and differ between center- and home-based programs

Overall, center- and home-based directors are fairly satisfied with the subsidy system, with relatively few directors identifying major challenges to participating in the state subsidy program, Child Care Services (CCS). The top challenges identified as “major” by directors differ between center- and home-based programs.

Specifically, the top three major challenges for center-based programs include: collecting copayments from families (reported by 22% of center-based directors), the requirement to participate in Texas Rising Star (TRS; 18%), and turnover among children using subsidies (12%).

For home-based programs, the top major challenges include: participation in Texas Rising Star (TRS; 19%), the subsidy reimbursement rate (18%), and the amount of paperwork/administrative burden needed to participate in the Child Care Services program (18%; see Figure 12).

Figure 12: Top Three Factors That Pose “A Major Challenge” to Child Care Services Program Participation



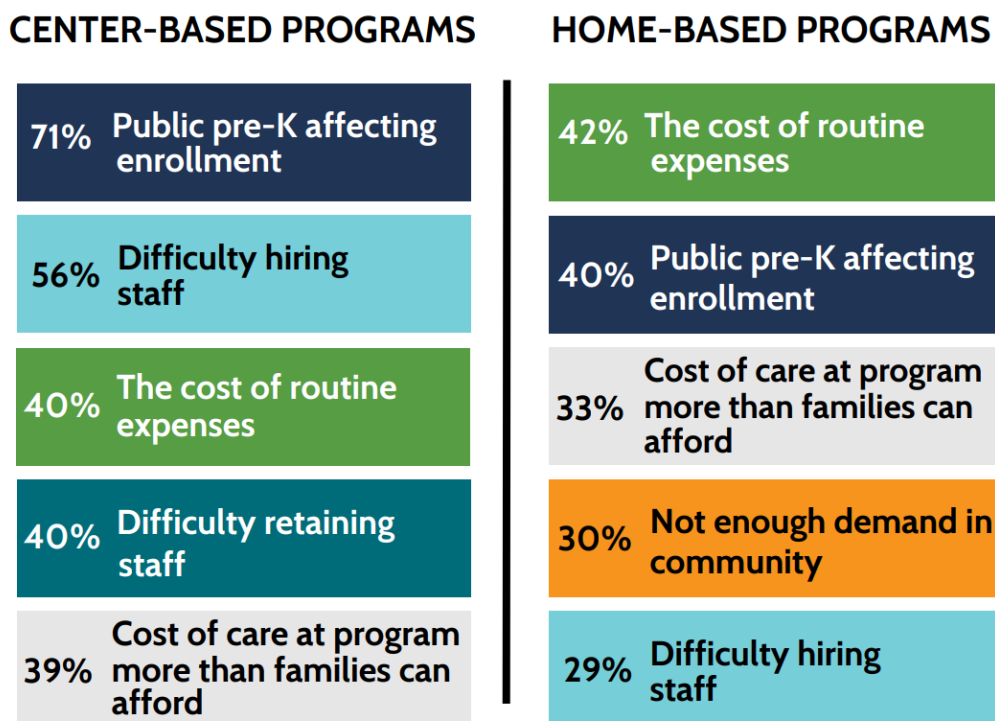
Source: 2024 North Texas Director Survey. The Prenatal-to-3 Policy Impact Center, 2025. Note: n=288 center-based programs and n=90 home-based programs.

Most programs report challenges to maximizing enrollment, citing public pre-K as a key obstacle

Just 6 percent of center-based directors and one in four home-based directors report that they can enroll enough children to reach their self-described full enrollment, without major challenges. The remaining directors face substantial barriers.

In particular, 71 percent of center-based directors and 40 percent of home-based directors cite public pre-K as a key barrier to maximizing enrollment (see Figure 13).

Figure 13: Top Five Program Challenges to Reaching Full Enrollment



Source: 2024 North Texas Director Survey. The Prenatal-to-3 Policy Impact Center, 2025. Note: n=373 center-based programs and n=123 home-based programs.

Directors note that public pre-K affects their ability to fully enroll preschool-aged children, a group that typically generates the most revenue and helps offset the higher costs of serving younger children. Because most programs already operate on razor-thin margins, even slight shifts in enrollment can jeopardize a program's financial stability.

Beyond public pre-K, directors report similar barriers to maximizing enrollment, with minor differences by program type

Beyond public pre-K, center- and home-based child care programs identify similar challenges that limit their ability to serve the maximum number of children their programs

could support. Challenges to hiring staff, the cost of routine expenses, and families' ability to afford care are among the top-most selected challenges for both program types.

A top-five challenge to maximizing enrollment reported only by center-based programs is difficulty retaining staff (40%), whereas a top-five challenge reported only by home-based programs is limited demand for their services in their communities (30%).

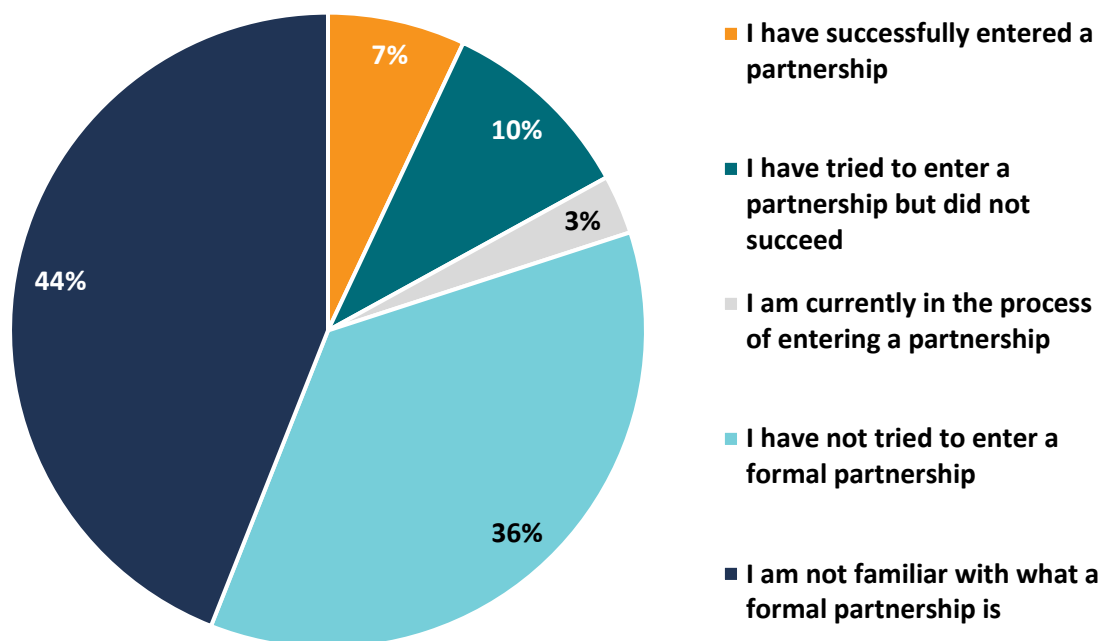
See Figure 13 for the list of the top-five challenges reported by program type, including the percentage of directors who selected each as a barrier to maximizing enrollment.

Most center-based directors are not aware of public pre-K partnership opportunities

TWC and the Texas Education Agency (TEA)'s pre-K partnerships allow school districts to partner with child care programs to offer public pre-K to 3- and 4-year-olds in a community-based setting.⁵⁵ Though goals for introducing public pre-K partnerships included mitigating the financial impact of public pre-K expansion on independently owned child care programs, 81 percent of center-based directors across North Texas report very limited interaction with or knowledge of these partnership opportunities.

Almost half (44%) of center-based directors have no familiarity with formal public pre-K partnerships, and in addition, more than one in three directors (36%) have never tried to enter a formal public pre-K partnership (see Figure 14).

Figure 14: Center Director Experiences with Formal Public Pre-K Partnerships

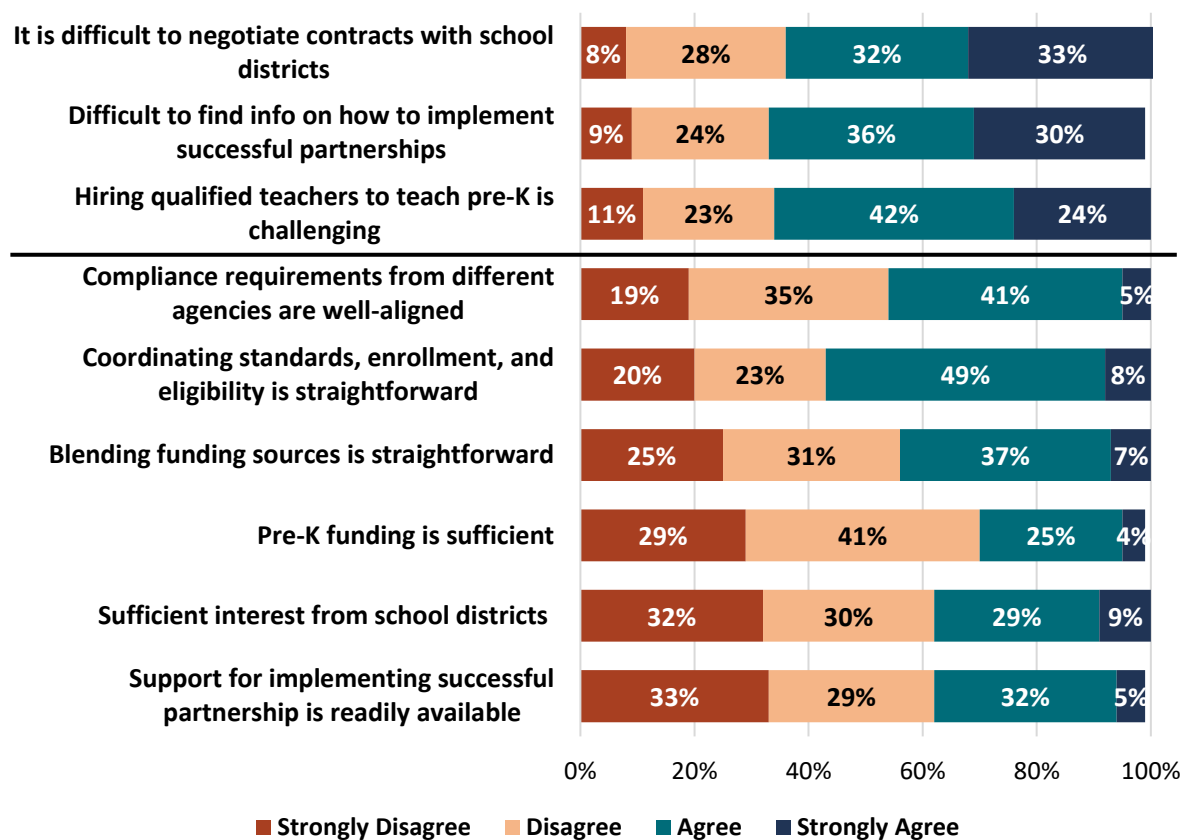


Source: 2024 North Texas Director Survey. The Prenatal-to-3 Policy Impact Center, 2025. Note: The sample is limited to center-based programs (n=395).

Directors with pre-K partnership experience note challenges such as a lack of school district interest and inadequate funding

Among the 20 percent of center-based directors who have tried to enter a public pre-K partnership, successfully and unsuccessfully, or are currently in the process, approximately one in three (33%) directors strongly disagree that support for implementing successful partnerships is readily available, and a similar share strongly disagree that there is sufficient interest from school districts (32%). In addition, 33 percent of directors strongly agree that it is difficult to negotiate contracts with school districts (see Figure 15).

Figure 15: Center-Based Directors' Experience with Public Pre-K Partnerships



Source: 2024 North Texas Director Survey. The Prenatal-to-3 Policy Impact Center, 2025 Note: The sample is limited to center-based programs that have tried to enter or are currently in a formal public pre-K partnership (n=75). Percentages may not sum to 100% due to rounding.

Together, these findings suggest that many directors face barriers to forming formal pre-K partnerships, particularly related to support, district engagement, and contract processes.

Programs struggle to hire and retain a stable, high-quality workforce, driven by low, uncompetitive wages and limited benefits

A stable, well-compensated ECE workforce is essential to maintaining high-quality care. Without enough staff, child care programs cannot fully enroll children, maximize access, or provide continuity of care. Low wages and limited benefits not only affect staff retention but also undermine the long-term sustainability of the child care system.

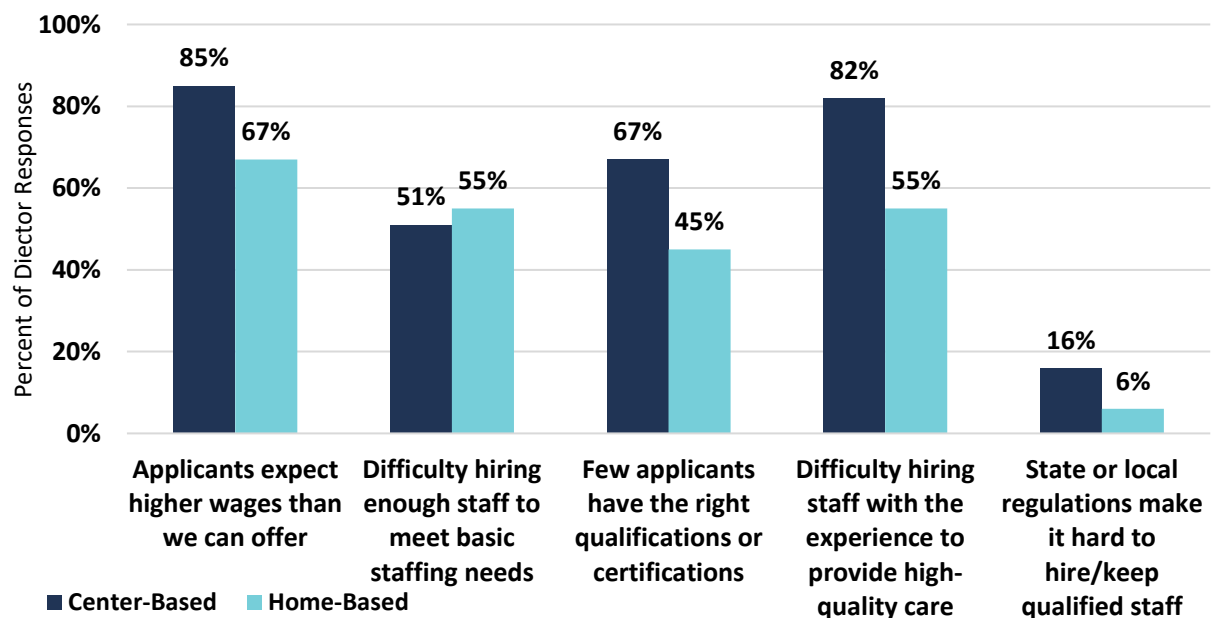
Applicants expect higher wages than directors can offer, leading to difficulty hiring experienced staff or even meeting basic staffing needs

Forty-four percent of directors in the North Texas Survey Sample report hiring difficulties. Among programs with hiring difficulties, 85 percent of center-based directors and 67 percent of home-based directors report that applicants expect higher wages than their programs can offer.

Approximately half of the center- and home-based directors who face hiring challenges struggle to hire enough staff to meet their basic staffing needs. The challenge is even greater when it comes to finding qualified candidates; 67 percent of center directors and 45 percent of home-based directors report a lack of applicants with the necessary qualifications and certifications.

Furthermore, when seeking experienced staff capable of providing high-quality care, the challenge intensifies, with 82 percent of center directors and 55 percent of home-based directors struggling to find suitable candidates (see Figure 16).

Figure 16: Hiring Challenges Reported by Directors Struggling to Recruit Staff

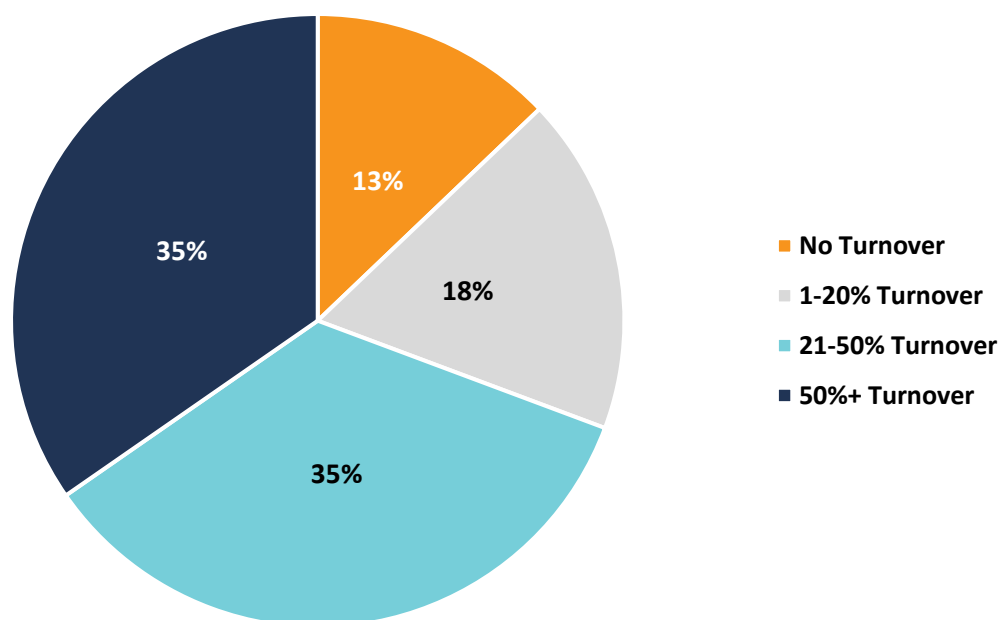


Source: 2024 North Texas Director Survey. The Prenatal-to-3 Policy Impact Center, 2025. Note: The sample is limited to programs that reported difficulties hiring staff (n=235); n=202 center-based programs and n=33 home-based programs. Not shown are “Other” responses.

The majority of center-based programs grapple with high turnover, with 70 percent losing at least one-fifth of their staff each year

High turnover of educators is a central issue across center-based programs, with an average annual turnover rate of 52 percent, indicating substantial staffing instability in child care programs. Using a 20 percent annual turnover rate as a benchmark for high turnover is consistent with practices in ECE workforce research.^{56,57,58} Based on this benchmark, 70 percent of child care programs experienced high turnover in the past year (see Figure 17). Turnover rates are similar across Workforce Boards.

Figure 17: Annual Early Childhood Educator Turnover Rates at Child Care Centers



Source: 2024 North Director Survey. The Prenatal-to-3 Policy Impact Center, 2025. Note: The sample is limited to center-based programs (n=388).

Some level of turnover can be healthy, allowing child care programs to replace underperforming staff; however, high turnover at this scale can disrupt classroom consistency, impact program quality, and place additional strain on directors' efforts to maintain a stable workforce. These findings underscore the need for targeted strategies to retain early childhood educators.

More than half of directors report that increasing pay and offering more benefits would reduce turnover at child care programs

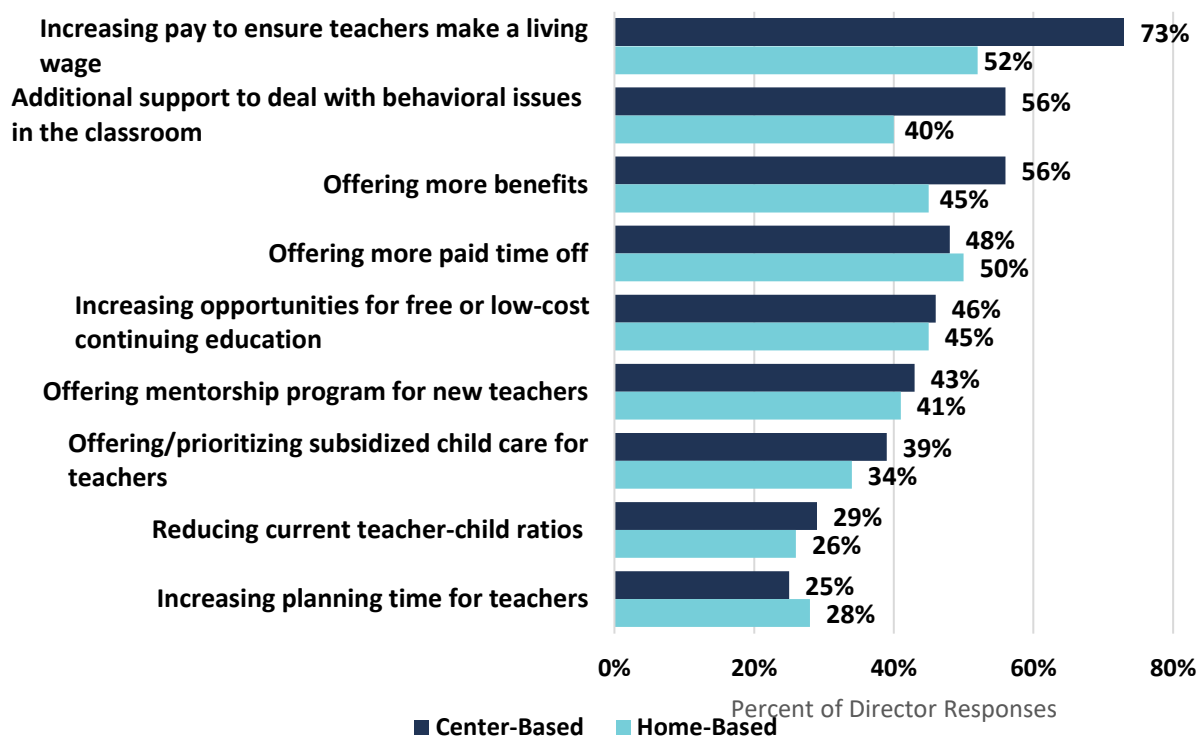
Low wages and limited access to benefits continue to present barriers for directors seeking to attract and retain early childhood educators. In addition to challenges with

recruitment, many directors report that retaining experienced staff remains difficult. Of the 94 percent of directors who reported turnover as a challenge to their program, most indicate that increasing pay to ensure teachers make a living wage would help reduce turnover “a lot,” including 73 percent of center-based directors and 52 percent of home-based directors.

Directors also emphasize the role of providing additional benefits in reducing turnover. Among directors who reported turnover challenges, 56 percent of center-based directors say that offering more benefits and 48 percent say that providing more paid time off would reduce turnover “a lot.” Directors from home-based programs report similar priorities.

In addition to increasing wages and offering benefits, directors note several other strategies that could help reduce turnover. Among directors who reported turnover challenges, 56 percent of center-based directors and 40 percent of home-based directors say that providing additional classroom behavioral supports would reduce turnover “a lot.” Approximately 45 percent of directors from both program types cite increasing opportunities for low-cost continuing education, and approximately 40 percent identify offering mentorship programs for new teachers as actions that would meaningfully support educator retention (Figure 18 for full results).

Figure 18: Factors That Would Help “A Lot” to Reduce Turnover at Child Care Program



Source: 2024 North Texas Director Survey. The Prenatal-to-3 Policy Impact Center, 2025. Note: The sample is limited to programs with staff and those that reported turnover challenges; n=372 center-based programs and n=58 home-based programs.

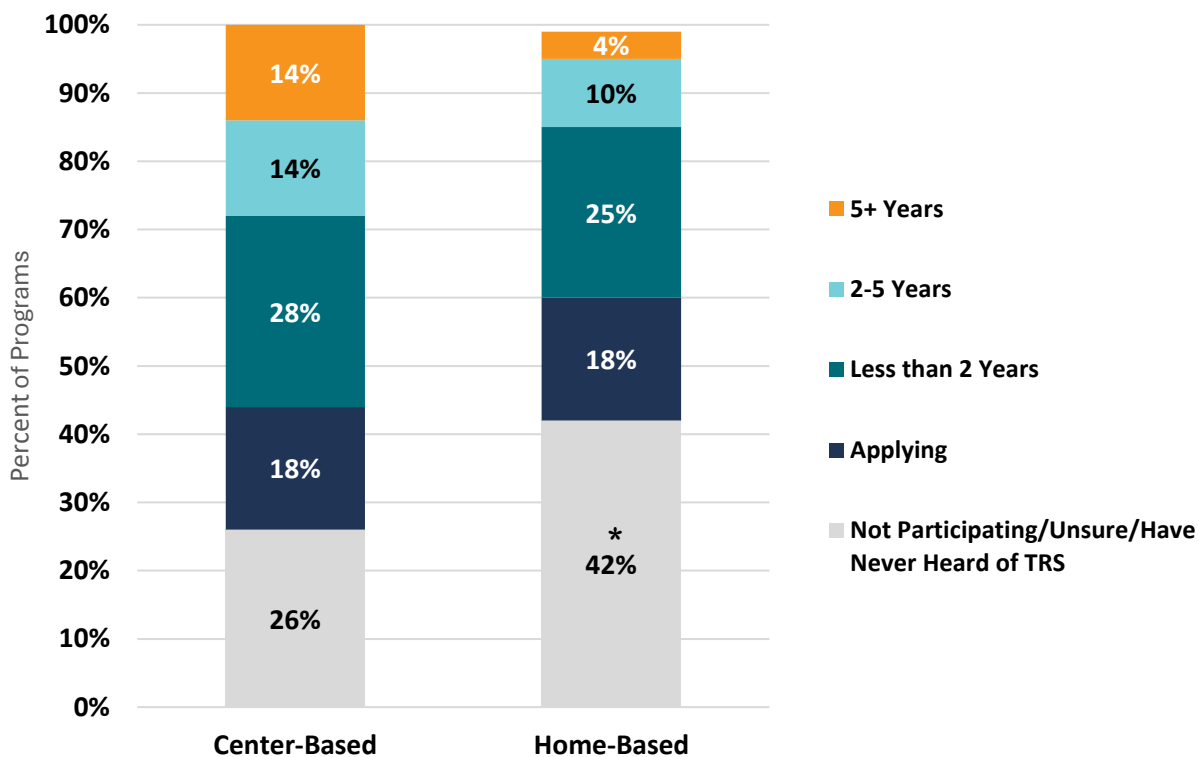
Seventy-four percent of center-based programs and 58 percent of home-based programs participate in or are currently applying to TRS

Texas Rising Star (TRS), the state's Quality Rating and Improvement System (QRIS), aims to enhance the quality of ECE programs. As of October 2022, all programs receiving subsidies through the CCS program are required to participate in TRS and must achieve a 2-star rating or higher within 24 months of joining.

Among center-based programs, 74 percent participate in TRS, either with a current rating (56%) or in the process of applying (18%). In comparison, 58 percent of home-based programs participate, with only 39 percent currently rated and 18 percent in the process of applying. This difference in TRS participation rates between centers and homes is statistically significant.

Most programs are new to TRS, with only 28 percent of center-based programs and 14 percent of home-based programs participating in TRS for at least 2 years (see Figure 19).

Figure 19: Length of Time Programs Have Participated in Texas Rising Star (TRS)



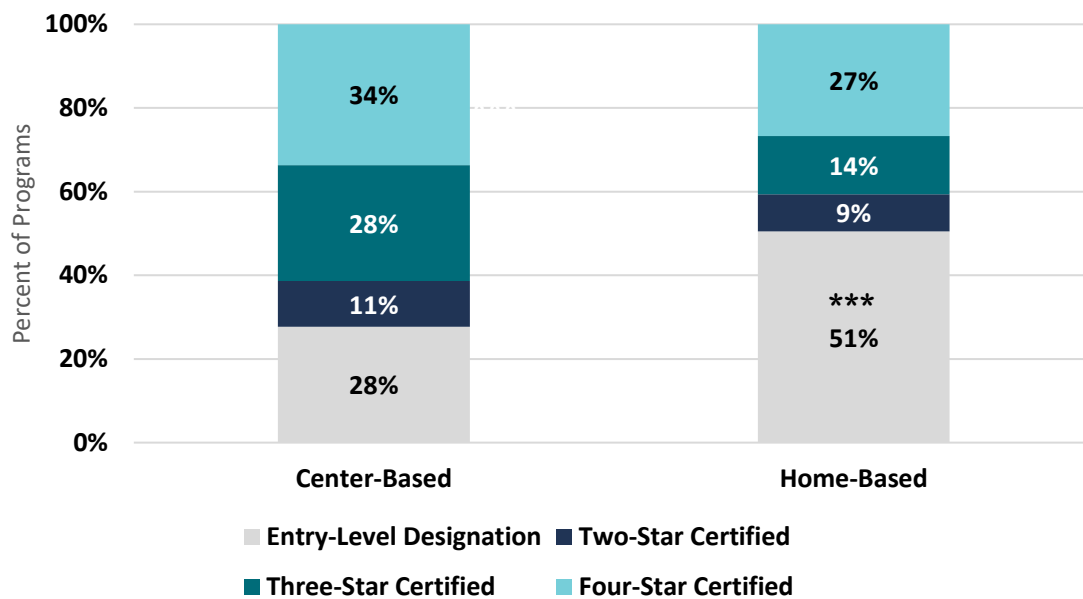
Source: 2024 North Texas Director Survey. The Prenatal-to-3 Policy Impact Center, 2025. Note: n=395 center-based programs and n=163 home-based programs. Percentages may not sum to 100% due to rounding.

* $p < 0.05$, ** $p < 0.01$, *** $p < 0.001$.

One-third of TRS-rated programs hold a Four-Star certification, but most home-based programs remain entry-level

In the North Texas Survey Sample, center-based and home-based child care programs that participate in TRS are similarly likely to hold a Four-Star TRS certification. Among TRS-participating programs, 34 percent of center-based programs and 27 percent of home-based programs hold a Four-Star certification, a difference that is not statistically significant. In contrast, home-based programs are more likely to hold an entry-level designation (51%) compared to center-based programs (28%; see Figure 20).

Figure 20: Current Texas Rising Star Rating by Program Type



Source: 2024 North Texas Director Survey. The Prenatal-to-3 Policy Impact Center, 2025. Note: The sample is limited to programs that participate in TRS ($n=386$); $n=293$ center-based programs and $n=93$ home-based programs. * $p < 0.05$, ** $p < 0.01$, *** $p < 0.001$.

TRS ratings differ significantly by Workforce Board. In Greater Dallas, 43 percent of TRS-rated programs are Four-Star certified, compared to 20 percent in North Central Texas and 34 percent in Tarrant County. Programs in Greater Dallas and Tarrant County are significantly more likely to be Four-Star certified than programs in North Central Texas.

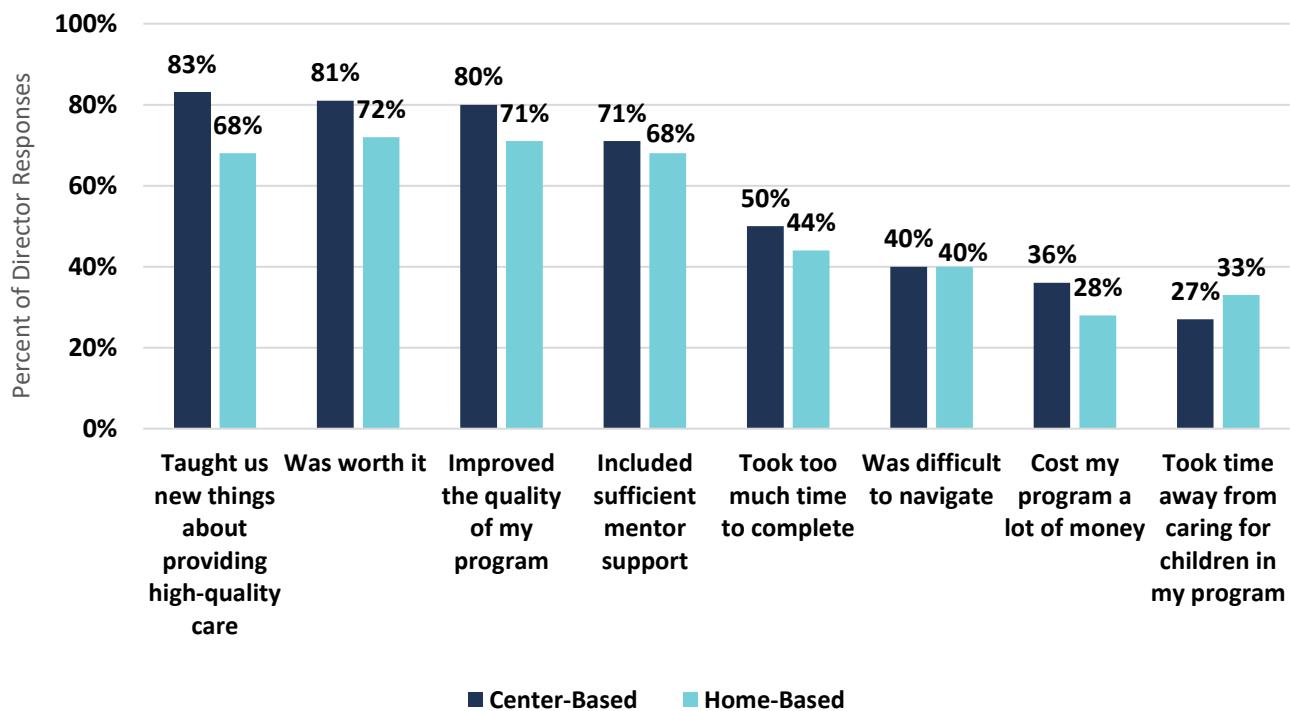
Most directors view the TRS application process as a positive and valuable experience

Most new providers to TRS or those currently in the application process report that joining the program has been a positive experience. Seventy percent of directors received sufficient mentor support during the application process, 78 percent learned something new about providing high-quality care, 78 percent felt the application process improved the quality of their program, and 79 percent of directors believe the process of becoming TRS-certified was worth the effort.

Even with generally positive experiences, providers still encounter challenges in participating in TRS. Among new TRS participants, 50 percent of center-based directors and 44 percent of home-based directors say that the application process takes too much time. Forty percent of both center-based and home-based directors find the application process difficult to navigate.

Additionally, 36 percent of center-based directors and 28 percent of home-based directors report that meeting TRS standards costs their program a lot of money. Approximately one-third (33%) of home-based directors and one-fourth (27%) of center-based directors also say that the process takes time away from caring for children. See Figure 21 for full results.

Figure 21: What Do Directors Find “True” about the Texas Rising Star Application Process



Source: 2024 North Texas Director Survey. The Prenatal-to-3 Policy Impact Center, 2025 Note: The sample is limited to programs that recently applied for TRS; n=178 center-based programs and n=68 home-based programs.

Overall, participation in the TRS program supports quality improvement. Most directors describe the TRS application process as positive, particularly in terms of mentorship, learning, and program development, though providers still encounter challenges with the application process, including time, cost, and complexity.

Directors show interest in advancing their education, highlighting barriers and supports relevant to the broader ECE workforce

Only an estimated 18 percent of center-based early childhood educators across North Texas hold a CDA credential or are working toward one, and 24 percent hold a bachelor's degree or higher (see Table 6). Although this study does not include direct survey responses from early childhood educators, directors often begin their careers in the classroom and can provide valuable insight into potential pathways for or barriers to educator advancement.⁵⁹

Many directors without a degree or credentials express interest in further education, though most are not currently enrolled

Among surveyed directors, 42 percent hold or are working toward a CDA credential, and 39 percent hold a bachelor's degree or higher, most often in child development or a related field (62%).

Among directors with less than a bachelor's degree, most (88%) are not currently enrolled in a college or university, including 86 percent of center-based directors and 91 percent of home-based directors.

Still, more than half (58%) of center-based directors with less than a bachelor's degree are interested in earning a degree. Interest in earning a bachelor's degree among home-based directors is somewhat lower, at 39 percent.

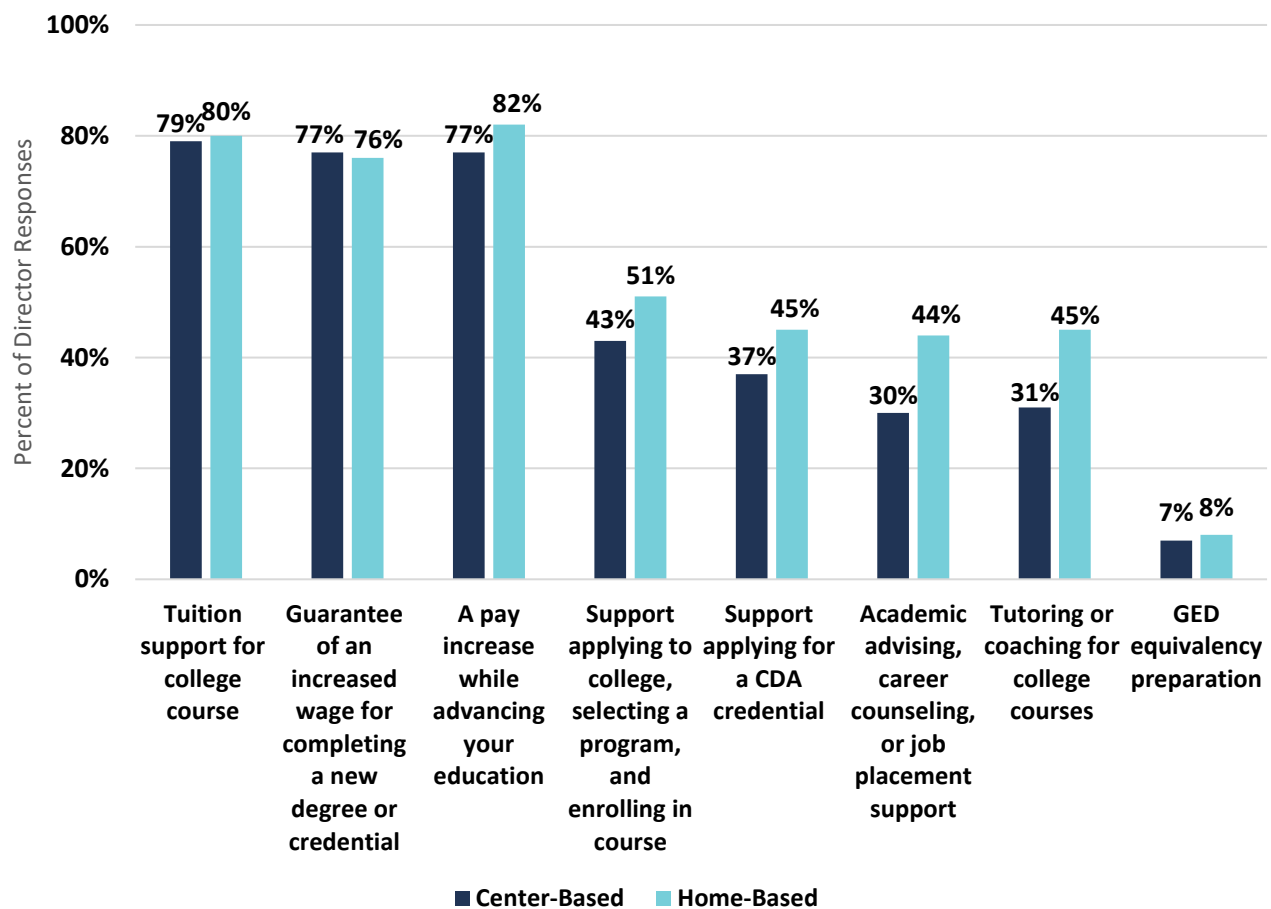
Among directors without a CDA credential or a degree (bachelor's degree or higher), 55 percent want to earn a CDA credential.

Directors identify tuition support and wage increases as key incentives for pursuing additional credentials, highlighting supports that may benefit the broader ECE workforce

Among directors who do not hold a CDA credential or degree but express interest in continuing their education, most rate financial incentives as very helpful for making progress. For center-based directors, 77 percent rate a pay increase while continuing their education as very helpful, 77 percent rate a guaranteed wage increase for completing a degree or credential as very helpful, and 79 percent rate tuition support for college classes as very helpful.

As shown in Figure 22, home-based directors report similar top supports.

Figure 22: What Supports Would Directors Find “Very Helpful” for Advancing Their Education



Source: 2024 North Texas Director Survey. The Prenatal-to-3 Policy Impact Center, 2025 Note: The sample is limited to directors who do not hold a CDA or degree but express interest in continuing their education; n=131 center-based programs and n=65 home-based programs.

Overall, most directors without a degree or credential express interest in advancing their education but remain unenrolled, often citing financial incentives as key to making progress. Supports such as tuition assistance and wage increases are especially motivating.

Director experiences may help to inform efforts to build the workforce pipeline and raise qualification levels by illustrating the barriers and supports that shape progress toward higher credentials.

Conclusion

Findings from the North Texas Survey Sample highlight ongoing challenges facing programs and educators in the early care and education industry. Many child care programs continue to operate with slim or negative margins, and particularly among programs offering child care subsidies, financial sustainability remains precarious. Although subsidy reimbursement rates have improved and most programs are willing to serve more families using subsidies, other pressures—including enrollment losses to public pre-K, high staff turnover, and limited access to benefits for educators—continue to strain the workforce. Addressing financial stability, strengthening supports for educators, improving alignment between early childhood systems, and rewarding higher credentials with higher wages will be critical to building a more sustainable ECE workforce in North Texas.

Chapter 6: Educator Wages Across North Texas

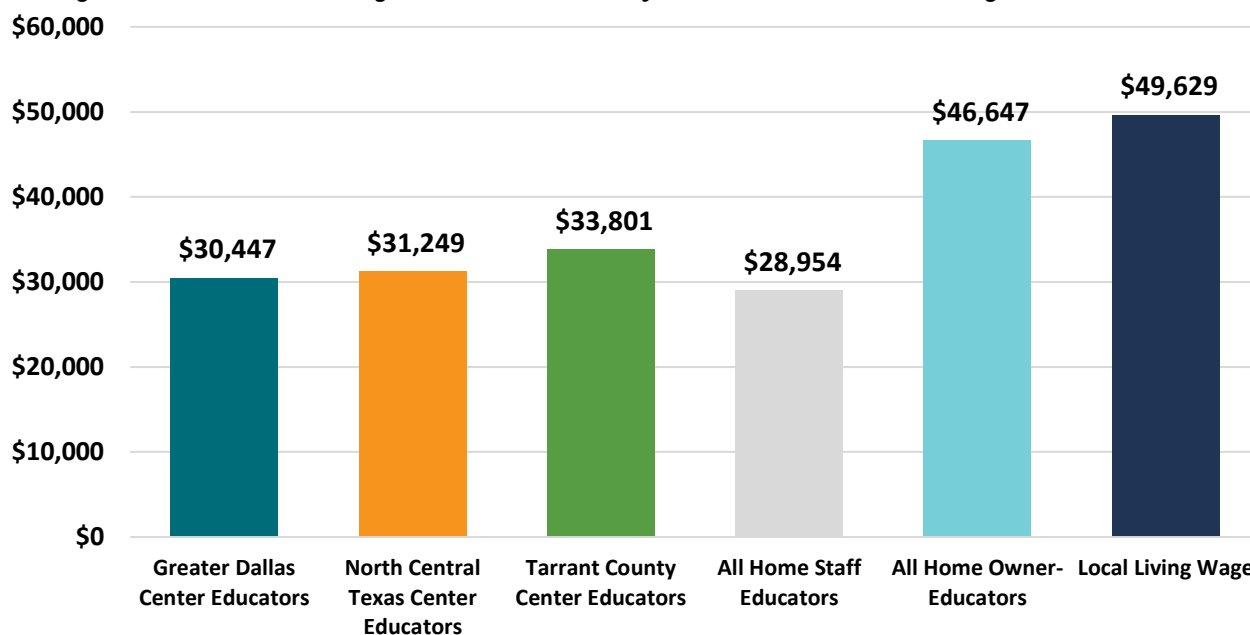
Across North Texas, early care and education (ECE) workforce wages remain far below the living wage standard, even for a single adult living alone, and wages have not risen substantially over the past few years. In the following chapter, we use the Educator Wage Sample described in Chapter 2 to describe the ECE wage landscape across North Texas among regulated child care programs, including typical early childhood educator wages in the region. We also describe the various educator and program factors that affect wages at center-based programs, with a focus on identifying whether there are disparities in educator wages based on race and ethnicity.

Only 4 percent of all early childhood educators in North Texas receive a living wage; the average center educator earns \$31,702 annually

Across the North Texas region, wages for early childhood educators remain far below the region's local living wage, or the minimum annual wage needed to support a single adult living alone. The local living wage for the Dallas-Fort Worth-Arlington metropolitan area is \$23.86 per hour, or \$49,629 per year.⁶⁰

Figure 23 shows the average educator wage among center-based educators in each Workforce Board, home-based educators, and home-based owner-educators, compared to the regional living wage threshold.

Figure 23: Annual Average North Texas Early Childhood Educator Wages



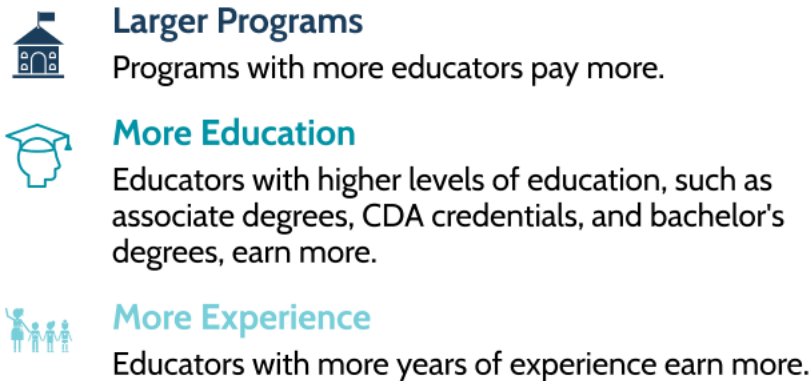
Source: 2024 North Texas Director Survey. The Prenatal-to-3 Policy Impact Center, 2025. Notes: n=339 programs and n=2,398 educators.

Considering all center-based educators, home-based educators, and home-based owner-educators, only 4 percent of educators in North Texas earn at least a living wage annually.^e The average center educator wage (\$15.24 hourly or \$31,702 annually) falls \$8.62 per hour below the living wage threshold. Educators supporting children with solely their income face a much steeper gap between their wages and a living wage.

Working at a larger child care center is associated with better pay

Several program factors are associated with educator pay. Typically, educators at larger programs (i.e., programs with more educators) earn more than educators at smaller programs (see Figure 24).

Figure 24: Factors Associated with Higher Educator Pay



Source: 2024 North Texas Director Survey. The Prenatal-to-3 Policy Impact Center, 2025. Notes: n=216 programs and n=2,238 educators. See Appendix C for full regression models.

Higher levels of education and more experience are associated with modest pay increases at child care centers

In center-based programs, educators with higher levels of education and more years of experience, on average, earn more than those with lower levels of education and fewer years of experience. Educators with a CDA credential, associate degree, or bachelor's degree tend to receive higher pay than educators with only a high school diploma or equivalent.

In each Workforce Board, center-based educators with a bachelor's degree earn more than educators with a high school diploma. Specifically, center-based educators with a bachelor's degree can expect to earn between \$1.18 and \$1.88 more per hour (or between \$2,454 and \$3,910 more per year) than educators with a high school diploma.

^e Head Start programs were excluded from the early childhood educator wages analyses.

Similarly, educators with more years of experience earn more than educators who are new to the field, but gains are also small for each year of experience. For example, even after more than 20 years in the field, educators earn less than \$3.00 per hour (or less than \$6,240 annually) more than educators just starting out. Assistant teachers and floaters also earn less than lead teachers, by between \$0.69 and \$1.16 per hour (or \$1,435 and \$2,413 annually), depending on the Workforce Board.

To illustrate how educators' wages increase with education and experience, Table 13 presents predicted hourly wages for all center-based educators across the North Texas region as a whole, by education level (holding years of experience constant), and years of experience (holding education level constant). Considering the time and resource costs associated with obtaining higher education, the observed wage gains with more education are quite small. Gains from each additional year in the field are modest, and even after two decades of experience, predicted wages remain well below the regional living wage threshold.

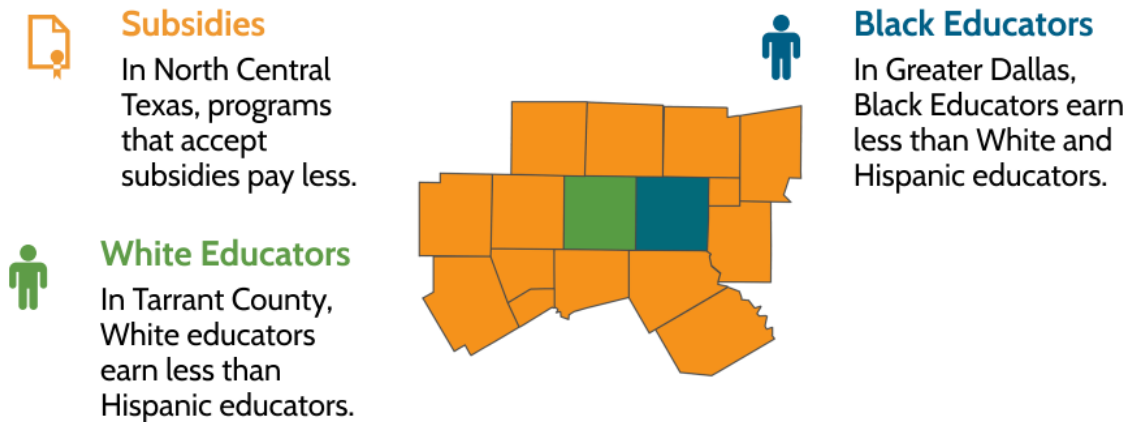
Table 13: Predicted Hourly Wage by Education and Experience

1-5 Years Experience and...		High School Diploma and...	
High School Diploma	\$14.31	Less than 1 Year Experience	\$13.33
Some College, No Degree	\$14.63	1-5 Years Experience	\$14.31
CDA Credential	\$15.34	6-10 Years Experience	\$15.03
Associate Degree	\$15.45	11-20 Years Experience	\$15.76
Bachelor's Degree	\$15.76	More than 20 Years Experience	\$16.28

Source: 2024 North Texas Director Survey. The Prenatal-to-3 Policy Impact Center, 2025. N=216 center-based programs and n=2,238 center-based educators. Wages are predicted using a linear regression model that controls for educator and program factors.

In the North Central Texas Workforce Board, working at a program that accepts subsidies is associated with making less

In North Central Texas, working at a program that accepts subsidies is associated with a lower wage; however, this difference is not observed in the other Workforce Boards (see Figure 25).

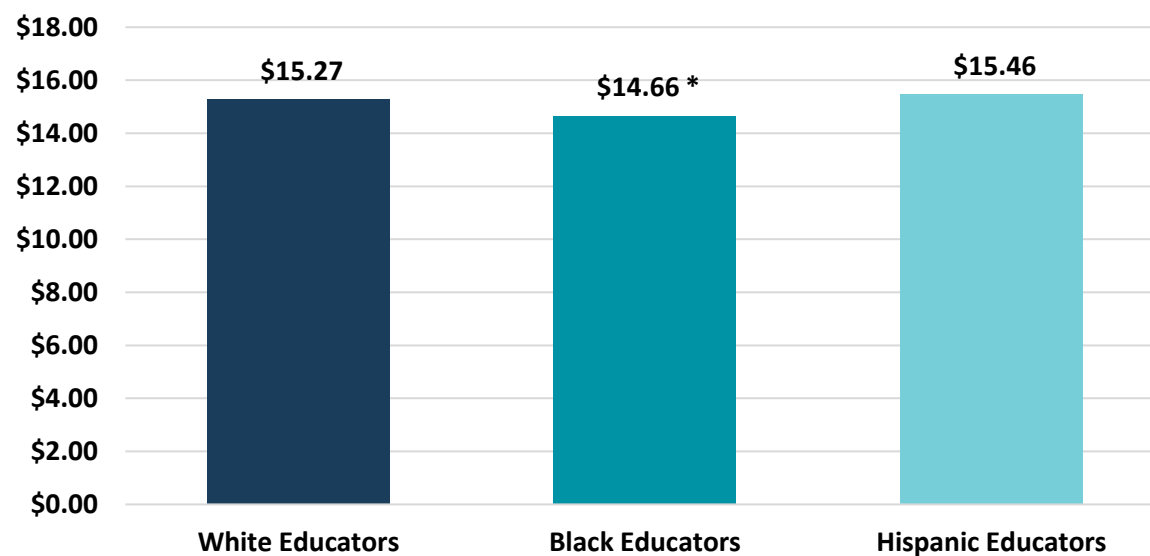
Figure 25: Factors Associated with Lower Educator Wages

Source: 2024 North Texas Director Survey. The Prenatal-to-3 Policy Impact Center, 2025. Notes: $n=216$ programs and $n=2,238$ educators. See Appendix C for full regression models.

Black educators earn less per hour than other educators at child care centers, before accounting for other factors that affect pay

Across North Texas, Black educators earn, on average, \$14.66 per hour, compared to \$15.27 per hour for White educators and \$15.46 for Hispanic educators.

The wage differences between Black educators and White educators and the wage difference between Black educators and Hispanic educators are both statistically significant (see Figure 26).

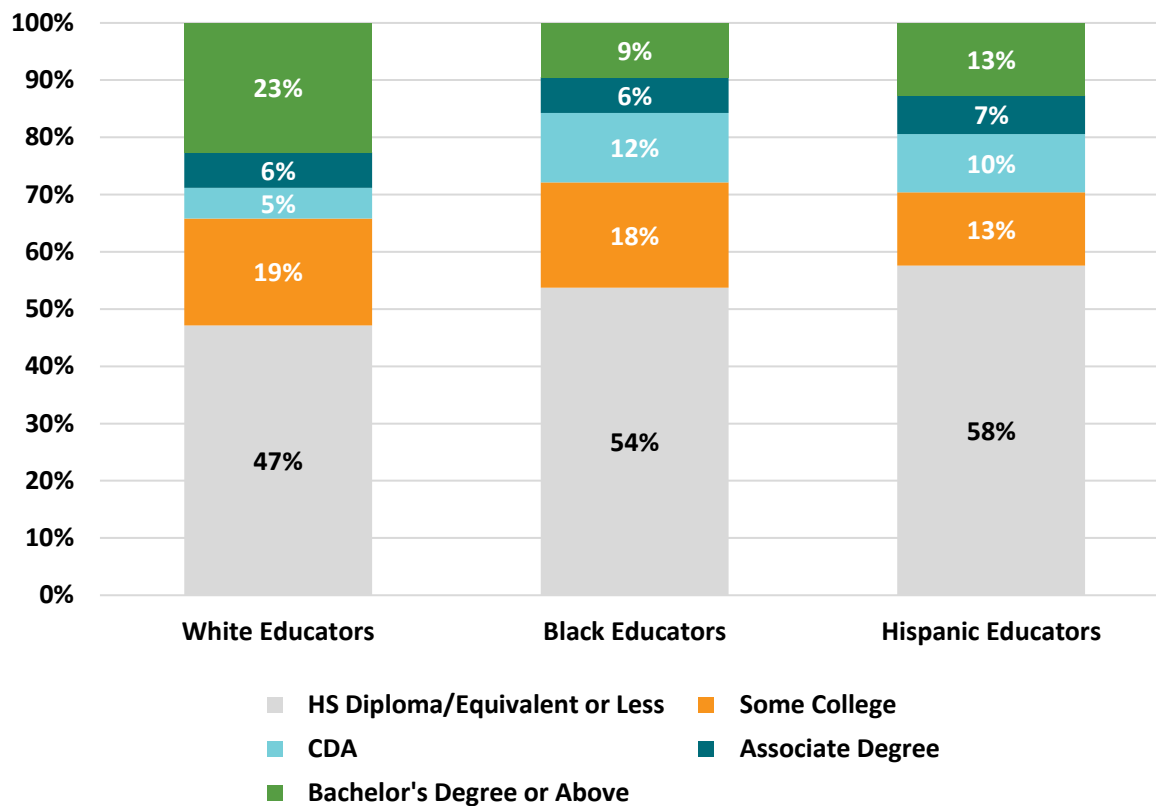
Figure 26: Average Hourly Wage by Race and Ethnicity

Source: 2024 North Texas Director Survey. The Prenatal-to-3 Policy Impact Center, 2025. Notes: $n=216$ center-based programs and $n=2,238$ center-based educators. * $p < 0.05$, ** $p < 0.01$, *** $p < 0.001$.

To better understand the factors contributing to wage differences among educators in North Texas with different racial and ethnic identities, we examined the role of education, experience, and program characteristics, such as Workforce Board and subsidy acceptance.

The level of education varies substantially across racial and ethnic identities. White educators are the most likely to have a higher education degree, with 23 percent of White educators holding at least a bachelor's degree. Thirteen percent of Hispanic educators hold at least a bachelor's degree, and only 9 percent of Black educators hold a bachelor's degree or higher (see Figure 27).

Figure 27: Educator Education Level by Race and Ethnicity



Source: 2024 North Texas Director Survey. The Prenatal-to-3 Policy Impact Center, 2025. Notes: n=216 center-based programs and n=2,238 center-based educators.

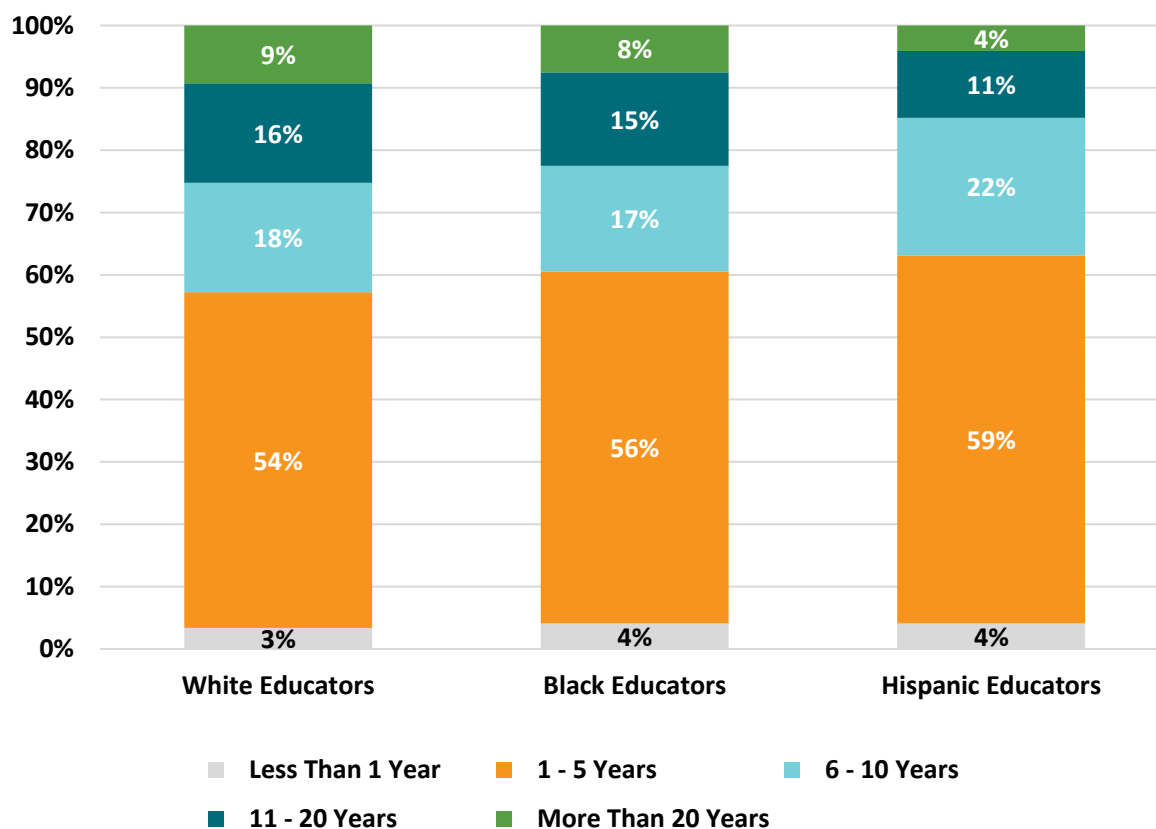
Numerous studies have established that higher levels of education are associated with higher wages, with each additional credential corresponding to increased earnings.^{61,62} Unsurprisingly, in North Texas, educators with higher levels of education tend to receive higher pay on average. Lower levels of education among certain racial and ethnic groups in North Texas, along with the corresponding wage differences, may reflect broader systemic barriers.

Scholars emphasize that racial and ethnic identities do not determine wages. Instead, historical and present-day inequities—such as limited access to higher education and

career advancement opportunities—can create compounding disadvantages that affect labor market outcomes, including compensation.^{63,64} As child care has long been a woman-dominated profession, and specifically, women of color, the industry as a whole has been undervalued. Research suggests that this history of undervaluation continues to influence compensation patterns across the profession.^{65,66}

Levels of experience look more similar across racial and ethnic groups. A significantly larger percentage of White center-based educators have more than 5 years of experience (43%) compared to Hispanic center-based educators (37%), but beyond that difference, educators are similarly likely to have more than 5 years of experience in the field (see Figure 28).

Figure 28 : Educator Level of Experience by Race and Ethnicity

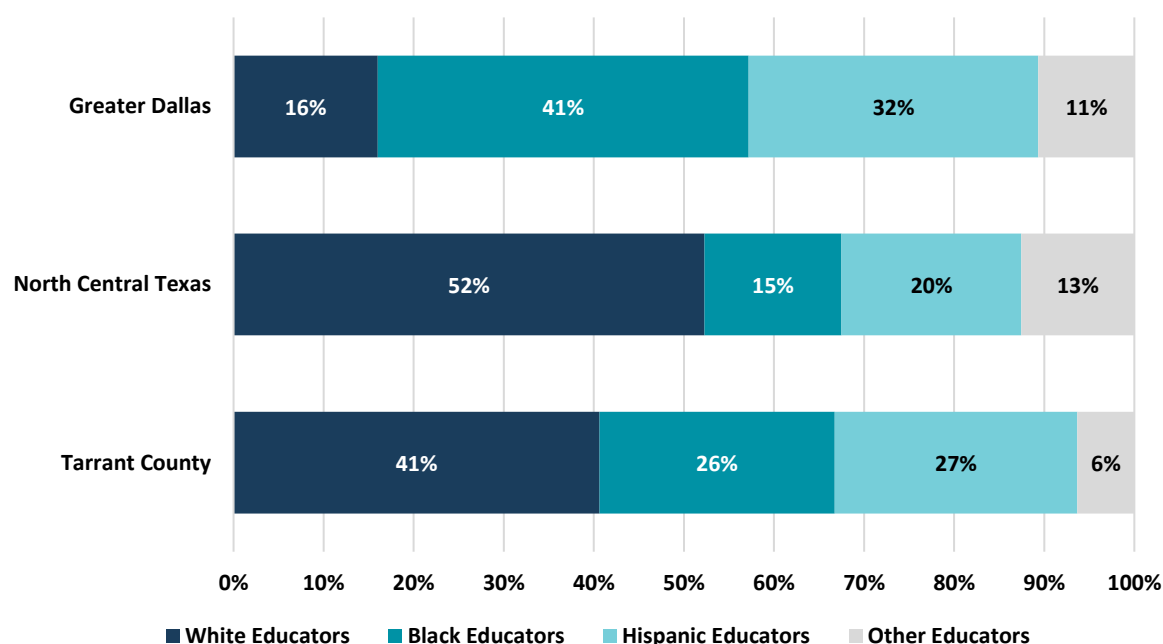


Source: 2024 North Texas Director Survey. The Prenatal-to-3 Policy Impact Center, 2025. Notes: n=216 center-based programs and n=2,238 center-based educators.

In addition to identifying differences in education across educators with different racial and ethnic identities, we also examined where educators from different racial and ethnic groups tend to work.^f In North Texas, the makeup of educators by race and ethnicity varies widely by Workforce Board.

Educators in Greater Dallas predominantly identify as Black (41%), the majority of educators in North Central Texas identify as White (52%), and educators in Tarrant County are more evenly split among White, Black, and Hispanic, but most commonly identify as White (41%; see Figure 29). Educators in the group of “other” racial and ethnic identities primarily include educators who identify as Asian or Arab/Middle Eastern.^g

Figure 29: Racial and Ethnic Composition of the ECE Workforce by Workforce Board



Source: 2024 North Texas Director Survey. The Prenatal-to-3 Policy Impact Center, 2025. Notes: n=216 center-based programs and n=2,238 center-based educators.

^f In this chapter, we present results reported by survey respondents in the Educator Wage Sample; in Figure 29, this includes 216 center-based programs. We do not extrapolate to the population level (N=3,108). Therefore, these results vary somewhat from estimates of the composition of the entire workforce reported in Chapter 3. Chapter 3 is most suitable for estimating the size and characteristics of the entire ECE workforce, whereas this chapter, Chapter 6, is most useful for understanding wages and comparing wages across groups.

^g Educators with racial and ethnic identities outside of White, Black, and Hispanic are too small in number to analyze or include in the analyses as individual groups.

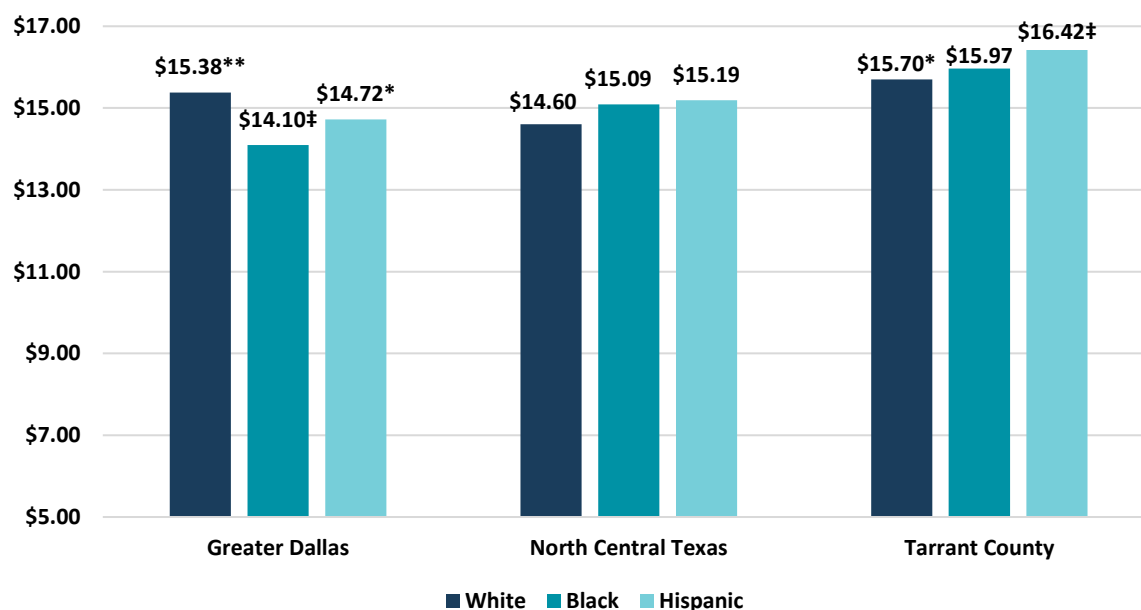
Accounting for other factors, educators with different racial and ethnic identities earn different wages; wage patterns differ across Workforce Boards

Patterns of how race and ethnicity are associated with wages vary across the Workforce Boards. As shown in Figure 30, in Greater Dallas, Black educators earn significantly less than White and Hispanic educators, even after accounting for educator and program characteristics, by \$1.28 and \$0.62 per hour, respectively. Hispanic educators and White educators have statistically similar wages in Greater Dallas.

In Tarrant County, Hispanic educators earn more than White educators by \$0.72 per hour, and Black and White educators earn similar wages after accounting for education and experience.

In North Central Texas, White, Black, and Hispanic educators earn similar wages.

Figure 30: Predicted Hourly Wage by Workforce Board and Educator Race/Ethnicity



Source: 2024 North Texas Director Survey. The Prenatal-to-3 Policy Impact Center, 2025. Notes: n=216 center-based programs and n=2,238 center-based educators. * $p < 0.05$, ** $p < 0.01$, *** $p < 0.001$. ‡ Denotes reference group. Wages are predicted using a linear regression model that controls for educator and program factors. Wages shown are for educators with an average level of experience and a high school diploma. See Appendix C for full model.

Conclusion

Across North Texas, early childhood educator wages remain far below the living wage standard, even for one adult living alone. Low educator wages contribute to the ongoing challenges directors have in hiring and retaining the staff they need, as educators are faced with the choice of remaining in their field at such low wages, with little prospect of substantial wage increases over time, or leaving the field for a better-paying industry.

Several program and educator characteristics are associated with educator wages. Working at a larger program is associated with a higher wage. Obtaining more education and experience is also associated with higher wages; however, these wage increases are relatively small in scale, even over time.

After accounting for education level and experience levels, the patterns of wages across racial and ethnic identities vary across Workforce Boards. Educators who identify as Black earn lower wages in Greater Dallas than educators who identify as Hispanic or White. However, in Tarrant County, Hispanic educators earn more than White educators. Educator wages are statistically similar in North Central Texas.

Prior to accounting for education and experience, we see that educators who identify as Black earn lower wages overall across the region. Barriers to higher education and credentialing disproportionately affect Black educators as part of an enduring impact of historical and present-day systemic racism. These barriers contribute to wage disparities in the North Texas region, identifying opportunities for child care leaders in North Texas to ensure that workforce support strategies target specific opportunity gaps and barriers that educators face.

Conclusion

The North Texas Child Care Workforce Study presents novel data on the current actual size and composition of the early care and education workforce and the current supply of child care that the current workforce supports. The study also provides metrics of potential supply among current programs and the number of additional educators needed to expand supply. Current programs also report a sizeable portion of currently vacant slots, underscoring a need for further exploration into child care demand and possible barriers to accessing child care.

Child care directors share clear challenges in financial stability, hiring and retaining a high-quality workforce, and the enrollment challenges caused by the expansion of public pre-K. Conversely, directors generally report that participating in the Texas Rising Star (TRS) program and the Child Care Services program (CCS) is overall a positive experience.

This study was designed to inform action. The North Texas Workforce Study's findings equip CCA, Workforce Boards, and other local leaders and partners with the data needed to shape workforce strategies, funding priorities, and policy decisions over the next decade. By offering data on workforce capacity and operational challenges, this study aims to provide the groundwork for building and sustaining a high-quality ECE workforce across North Texas. For communities seeking to align local planning with broader goals, the 2022 *Texas Child Care Strategic Plan*, developed by the Prenatal-to-3 Policy Impact Center, offers complementary recommendations. Together, these resources support the long-term goal of supporting a more stable ECE system for educators and families in North Texas.⁶⁷

Appendix A: North Texas Child Care Workforce

Current Workforce

Table 14 includes the estimated size of the current ECE workforce, including center-based and home-based early childhood educators and public Pre-K educators.

Table 14: Current Educators, with 95 Percent Confidence Intervals

Operation Type	Estimate	95% CI
North Texas Region		
ECE System	34,138	[33,280, 34,996]
All Educators	27,312	[26,454, 28,170]
Centers: Lead	15,216	[14,853, 15,579]
Center: Assistant/Floater	10,392	[10,087, 10,697]
Homes: Educators	578	[541, 615]
Homes: Owner-Educators	1,126	--
Public pre-K*	6,826	--
Greater Dallas		
ECE System	10,381	[9,941, 10,821]
All Educators	7,377	[6,937, 7,817]
Centers: Lead	4,165	[3,977, 4,353]
Center: Assistant/Floater	2,817	[2,647, 2,987]
Homes: Educators	84	[67, 101]
Homes: Owner-Educators	311	--
Public pre-K*	3,004	--
North Central Texas		
ECE System	14,883	[14,292, 15,474]
All Educators	12,917	[12,326, 13,508]
Centers: Lead	7,176	[6,936, 7,416]
Center: Assistant/Floater	5,027	[4,827, 5,227]
Homes: Educators	237	[214, 260]
Homes: Owner-Educators	477	--
Public pre-K*	1,966	--
Tarrant County		
ECE System	8,874	[8,442, 9,306]
All Educators	7,018	[6,586, 7,450]
Centers: Lead	3,875	[3,690, 4,060]
Center: Assistant/Floater	2,548	[2,402, 2,694]
Homes: Educators	257	[236, 278]
Homes: Owner-Educators	338	--
Public pre-K*	1,856	--

Source: The Prenatal-to-3 Policy Impact Center, 2025. US Department of Education, NCES, CCD, 2024. Notes: We estimated workforce counts using the Current Educator Subsample and the Fully Staffed Subsample data. Results were extrapolated to represent the estimated full population of approximately 27,312 educators across program types; *Public pre-K teacher counts are based on full-time equivalents (FTEs), which may represent multiple individuals. To account for paraprofessionals, we doubled the reported FTEs, assuming one additional staff member typically supports each educator.

Fully Staffed Workforce

Table 15 includes the estimated population of the ECE workforce if all current child care programs were fully staffed with educators and fully enrolled with children. These estimates do not include public pre-K educators.

Table 15: Total Educators if Fully Staffed, with 95 Percent Confidence Intervals

Operation Type	Estimate	95% CI
Total		
All Educators	37,651	[36,405, 38,897]
Centers: All Educators	35,128	[34,233, 36,023]
Homes: All Educators	2,523	[2,477, 2,569]
Homes: Educators	1,397	[1,351, 1,443]
Homes: Owner-Educators	1,126	--
Greater Dallas		
All Educators	12,113	[11,404, 12,822]
Center-Based: All Educators	11,358	[10,828, 11,888]
Homes: All Educators	755	[734, 776]
Home-Based: Educators	444	[423, 465]
Homes: Owner-Educators	311	--
North Central Texas		
All Educators	16,455	[15,630, 17,280]
Center-Based: All Educators	15,442	[14,858, 16,026]
Homes: All Educators	1,013	[979, 1,047]
Home-Based: Educators	536	[502, 570]
Homes: Owner-Educators	477	--
Tarrant County		
All Educators	9,083	[8,481, 9,685]
Center-Based: All Educators	8,328	[7,907, 8,749]
Homes: All Educators	755	[734, 776]
Home-Based: Educators	417	[396, 438]
Homes: Owner-Educators	338	--

Source: The Prenatal-to-3 Policy Impact Center, 2025. Notes: We estimated workforce counts using the Fully Staffed Subsample data. Results were extrapolated to represent the estimated full population of approximately 37,641 educators across program types.

Additional Educators Needed to be Fully Staffed

Table 16 includes the estimated number of additional educators required for all current child care programs to be fully staffed if fully enrolled with children. These estimates do not include public pre-K educators. Values in Table 16 represent the difference between values in Table 14 and Table 15.

Table 16: Additional Educators Needed to be Fully Staffed, with 95 Percent Confidence Intervals

Operation Type	Estimate	95% CI
Total		
All Educators: Current Educator Gap	10,339	[9,710, 10,968]
Centers: Current Educator Gap	9,520	[8,930, 10,110]
Homes: Current Educator Gap	819	[769, 869]
Greater Dallas		
All Educators: Current Educator Gap	4,736	[4,356, 5,116]
Centers: Current Educator Gap	4,376	[4,033, 4,719]
Homes: Current Educator Gap	360	[343, 377]
North Central Texas		
All Educators: Current Educator Gap	3,538	[3,133, 3,943]
Centers: Current Educator Gap	3,239	[2,850, 3,628]
Homes: Current Educator Gap	299	[262, 336]
Tarrant County		
All Educators: Current Educator Gap	2,065	[1,796, 2,334]
Centers: Current Educator Gap	1,905	[1,653, 2,157]
Homes: Current Educator Gap	160	[137, 183]

Source: The Prenatal-to-3 Policy Impact Center, 2025. Notes: We estimated workforce counts using the Current Educator Subsample and the Fully Staffed Subsample data. Results were extrapolated to represent the estimated full population of approximately 27,312 educators across program types.

Appendix B: North Texas Child Care Supply

Table 17 includes the estimated child care supply measures by Workforce Board and by age group where possible.

Table 17: Child Care Supply Measures

Operation Type	Licensed Capacity	Fully-Staffed Capacity	Actual Capacity	Current Enrollment
Total				
All Ages	301,058	231,212	215,778	145,453
All Early Childhood (birth - 4yr)	--	196,321	167,513	117,661
Infants (birth – 17mo)	--	--	28,889	20,407
Toddlers (18mo - 35mo)	--	--	57,550	41,443
Preschool (3 - 4yr)	--	--	81,074	55,811
School age (5 yr +)*	--	--	48,265	27,792
Greater Dallas				
All Ages	86,944	64,425	61,449	41,412
All Early Childhood (birth - 4yr)	--	51,489	45,052	32,245
Infants (birth – 17mo)	--	--	8,430	6,215
Toddlers (18mo - 35mo)	--	--	15,206	11,269
Preschool (3 - 4yr)	--	--	21,416	14,761
School age (5 yr +)*	--	--	16,397	9,167
North Central Texas				
All Ages	140,864	109,226	100,543	68,617
All Early Childhood (birth - 4yr)	--	94,868	80,338	56,661
Infants (birth – 17mo)	--	--	13,111	9,218
Toddlers (18mo - 35mo)	--	--	27,667	20,002
Preschool (3 - 4yr)	--	--	39,560	27,441
School age (5 yr +)*	--	--	20,205	11,956
Tarrant County				
All Ages	73,250	57,561	53,786	35,424
All Early Childhood (birth - 4yr)	--	49,964	42,123	28,755
Infants (birth – 17mo)	--	--	7,348	4,974
Toddlers (18mo - 35mo)	--	--	14,677	10,172
Preschool (3 - 4yr)	--	--	20,098	13,609
School age (5 yr +)*	--	--	11,663	6,669

Source: The Prenatal-to-3 Policy Impact Center, 2025. Notes: We estimated child care supply using the Current Enrollment Subsample, Actual Capacity Subsample, and the Fully-Staffed Capacity Subsample. Results were extrapolated to represent the estimated full population of children served and able to be served across North Texas's 3,108 programs.

Table 18 contains various measures of the gaps between licensed capacity, current enrollment, actual capacity, and fully-staffed capacity by Workforce Board and by age group where possible.

Table 18: Child Care Supply - Comparison of Supply Measures

Operation Type	Open Slots	Open Slots as a Percent of Actual Capacity	Additional Slots if Fully Staffed (Fully Staffed - Actual)	Fully- Staffed Capacity as a Percent of Licensed Capacity	Current Enrollment as a Percent of Licensed Capacity
Total					
All Ages	70,325	33%	15,433	77%	48%
All Early Childhood (birth - 4yr)	49,852	30%	28,808	--	--
Infants (birth – 17mo)	8,482	29%	--	--	--
Toddlers (18mo - 35mo)	16,107	28%	--	--	--
Preschool (3 - 4yr)	25,263	31%	--	--	--
School age (5 yr +)*	20,473	42%	--	--	--
Greater Dallas					
All Ages	20,037	33%	2,975	74%	48%
All Early Childhood (birth - 4yr)	12,807	28%	6,437	--	--
Infants (birth – 17mo)	2,215	26%	--	--	--
Toddlers (18mo - 35mo)	3,937	26%	--	--	--
Preschool (3 - 4yr)	6,655	31%	--	--	--
School age (5 yr +)*	7,230	44%	--	--	--
North Central Texas					
All Ages	31,926	32%	8,683	78%	49%
All Early Childhood (birth - 4yr)	23,677	29%	14,530	--	--
Infants (birth – 17mo)	3,893	30%	--	--	--
Toddlers (18mo - 35mo)	7,665	28%	--	--	--
Preschool (3 - 4yr)	12,119	31%	--	--	--
School age (5 yr +)*	8,249	41%	--	--	--
Tarrant County					
All Ages	18,362	34%	3,775	79%	48%
All Early Childhood (birth - 4yr)	13,368	32%	7,841	--	--
Infants (birth – 17mo)	2,374	32%	--	--	--
Toddlers (18mo - 35mo)	4,505	31%	--	--	--
Preschool (3 - 4yr)	6,489	32%	--	--	--
School age (5 yr +)*	4,994	43%	--	--	--

Source: The Prenatal-to-3 Policy Impact Center, 2025. Notes: We estimated child care supply using the Current Enrollment Subsample, Actual Capacity Subsample, and the Fully-Staffed Capacity Subsample. Results were extrapolated to represent the estimated full population of children served and able to be served across North Texas's 3,108 programs.

Appendix C: Regression Models Predicting Educator Wages

Table 19 contains results from linear regression models predicting center-based educator hourly wages (\$/hour) with educator race/ethnicity as the only predictor in the model. Results are shown with both educators that identify as White as the reference group and with educators that identify as Hispanic staff as the reference group.

Table 19: Linear Regression Predicting Educator Wage (\$/Hour), Workforce Boards Pooled

	North Texas	
	White Educators as Reference Group	Hispanic Educators as Reference Group
	Coefficient (SE)	Coefficient (SE)
Race/Ethnicity		
White Educators	Reference Group	-0.19 (0.27)
Black Educators	-0.61 (0.28)*	-0.81 (0.25)**
Hispanic Educators	0.19 (0.27)	Reference Group
Other Educators	0.73 (0.43)	0.54 (0.44)
Intercept	15.27 (0.27)***	15.46 (0.27)***
R²	0.02	0.02
Number of Observations	2,238	2,238

Source: Source: 2024 North Texas Director Survey. The Prenatal-to-3 Policy Impact Center, 2025. Notes: n=216 center-based programs and n=2,398 educators. *** $p < .001$, ** $p < .01$, * $p < .05$.

Tables 20 and 21 contain results from regression models predicting center-based educator hourly wages (\$/hour) with all relevant covariates in the models. Table 20 contains results with White staff as the reference group and Table 21 contains results with Hispanic staff as the reference group.

Table 20: Linear Regression Predicting Educator Wage (\$/Hour), Stratified by Workforce Board with White Educators as Race/Ethnicity Reference Group

	Greater Dallas	North Central Texas	Tarrant County
	Coefficient (SE)	Coefficient (SE)	Coefficient (SE)
Race/Ethnicity			
White Educators	Reference Group	Reference Group	Reference Group
Black Educators	-1.28 (0.43) **	0.49 (0.31)	0.27 (0.40)
Hispanic Educators	-0.66 (0.37)	0.59 (0.31)	0.72 (0.28) *
Other Educators	-1.07 (0.83) **	1.19 (0.41) **	0.09 (0.64)
Number of Staff (continuous)	0.09 (0.03) **	0.06 (0.02) *	0.15 (0.06) *
Accepts Subsidies			
No	Reference Group	Reference Group	Reference Group
Yes	-0.70 (0.67)	-0.97 (0.44) *	0.70 (0.94)
Teacher Role			
Lead	Reference Group	Reference Group	Reference Group
Assistant teacher/caregiver	-0.81 (0.21) ***	-0.85 (0.22) ***	-0.77 (0.28) **
Floater/rotating assistant	-0.69 (0.29) *	-0.94 (0.25) ***	-1.16 (0.40) **
Education Level			
High School Diploma or Less	Reference Group	Reference Group	Reference Group
Some college, no degree	0.77 (0.29) *	0.16 (0.25)	0.11 (0.28)
CDA	0.62 (0.34)	1.35 (0.46) **	1.33 (0.66) *
Associate's Degree (AA, AS)	0.66 (0.53)	1.09 (0.50) *	1.53 (0.59) *
Bachelor's Degree or above	1.45 (0.62) *	1.18 (0.41) **	1.88 (0.38) ***
Years of Experience			
Less Than 1 year	Reference Group	Reference Group	Reference Group
1 - 5 yrs	0.59 (0.52)	1.10 (0.36) **	0.04 (0.97)
6 -10 yrs	1.14 (0.55) *	1.98 (0.39) ***	0.58 (1.03)
11 - 20 yrs	2.09 (0.60) ***	2.49 (0.50) ***	1.62 (0.99)
More Than 20 yrs	2.44 (0.75) **	2.73 (0.83) **	2.79 (1.22) *
Intercept	13.83 (1.12) ***	12.75 (0.65) ***	12.40 (1.24) ***
R²	0.28	0.26	0.35
Number of Observations	600	1052	586

Source: Source: 2024 North Texas Director Survey. The Prenatal-to-3 Policy Impact Center, 2025. Notes: n=216 center-based programs and n=2,398 educators. *** p<.001, ** p<.01, * p<.05.

Table 21: Linear Regression Predicting Educator Wage (\$/Hour), Stratified by Workforce Board with Hispanic Educators as Race/Ethnicity Reference Group

	Greater Dallas	North Central Texas	Tarrant County
	Coefficient (SE)	Coefficient (SE)	Coefficient (SE)
Race/Ethnicity			
White Educators	0.66 (0.37)	-0.59 (0.31)	-0.72 (0.28)*
Black Educators	-0.62 (0.31)*	-0.11 (0.25)	-0.45 (0.32)
Hispanic Educators	Reference Group	Reference Group	Reference Group
Other Educators	-0.41 (0.76)	0.60 (0.40)	-0.62 (0.63)
Number of Staff (continuous)	0.09 (0.03)**	0.06 (0.02)*	0.15 (0.06)*
Accepts Subsidies			
No	Reference Group	Reference Group	Reference Group
Yes	-0.70 (0.67)	-0.97 (0.44)*	0.70 (0.94)
Teacher Role			
Lead	Reference Group	Reference Group	Reference Group
Assistant teacher/caregiver	-0.81 (0.21)***	-0.85 (0.22)***	-0.77 (0.28)**
Floater/rotating assistant	-0.69 (0.29)*	-0.94 (0.25)***	-1.16 (0.40)**
Education Level			
High School Diploma or Less	Reference Group	Reference Group	Reference Group
Some college, no degree	0.77 (0.29)*	0.16 (0.25)	0.11 (0.28)
CDA	0.62 (0.34)	1.35 (0.46)**	1.33 (0.66)*
Associate's Degree (AA, AS)	0.66 (0.53)	1.09 (0.50)*	1.53 (0.59)*
Bachelor's Degree or above	1.45 (0.62)*	1.18 (0.41)**	1.88 (0.38)***
Years of Experience			
Less Than 1 year	Reference Group	Reference Group	Reference Group
1 - 5 yrs	0.59 (0.52)	1.10 (0.36)**	0.04 (0.97)
6 -10 yrs	1.14 (0.55)*	1.98 (0.39)***	0.58 (1.03)
11 - 20 yrs	2.09 (0.60)***	2.49 (0.50)***	1.62 (0.99)
More Than 20 yrs	2.44 (0.75)**	2.73 (0.83)**	2.79 (1.22)*
Intercept	13.17***	13.34***	13.11***
R²	0.28	0.26	0.35
Number of Observations	600	1052	586

Source: Source: 2024 North Texas Director Survey. The Prenatal-to-3 Policy Impact Center, 2025. Notes: n=216 center-based programs and n=2,398 educators. *** p<.001, ** p<.01, * p<.05.

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