REINVESTMENT FUND

echo EVERY CHILD HAS OPPORTUNITIES

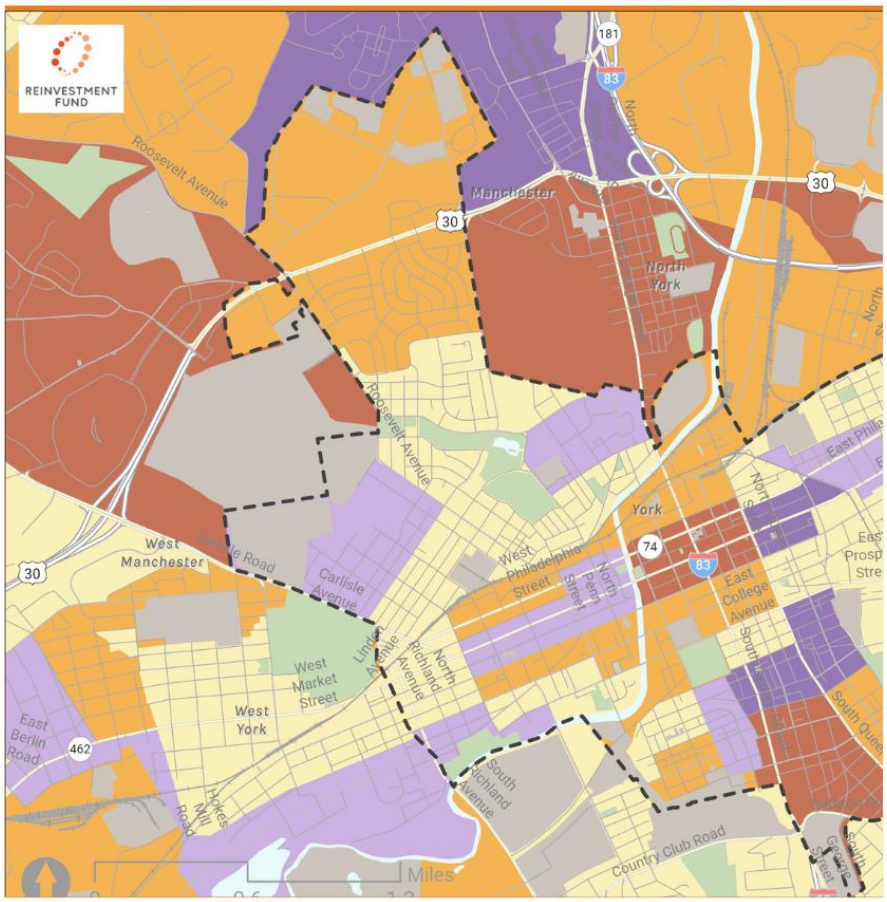
Community Connections for Children

York County Economic Alliance

Early Childhood Education In York County, PA: Supply, Demand, & Provider Perspectives

Prepared by **REINVESTMENT FUND**

Published **October 2025**



RESEARCH CONDUCTED BY

Policy Solutions at Reinvestment Fund

Michelle Schmitt, Senior Policy Analyst

Henry Feinstein, Policy Analyst

Intro

Early childhood education (ECE) is critical for young children: it prepares them to enter school academically and socially. It is also a necessary community resource that allows parents to participate in the labor force and complete training or education programs, in turn helping local economies thrive. Decisions, actions, and advocacy in the ECE sector are often based on anecdotal information rather than on comprehensive place-based data specific to the geography of interest. This is partially because there is no single source of supply or demand data and thus no way of directly assessing how many families are being left out of ECE (especially that which is high-quality). Reinvestment Fund's ECE gap analysis is a powerful analytic that locates gaps in access to high-quality ECE. This approach allows stakeholders and investors to better understand the existing ECE landscape and make data-based decisions on where to expand or improve the quality of ECE to have the greatest impact.

In Spring 2025, Reinvestment Fund partnered with Every Child Has Opportunities (ECHO), an ECE initiative in York County, Pennsylvania led by Community Connections for Children and York County Economic Alliance, to complete an ECE gap analysis for the entire county. This collaboration also included a survey of ECE providers across the county to better understand their experiences, challenges, and needs. This report presents the results of the gap analysis and survey together to paint a holistic picture of the ECE landscape in York County.

Key Findings

- Between 2020 and 2025, York County lost 77 early childhood education providers: 44 percent of the total number of providers in the county today exacerbating the need for ECE seats and increased the pressure on remaining providers across the county.
- There are approximately 21,600 children under five in York County who could be ECE customers, but only 12,100 available seats: the current supply meets 56% of estimated total demand. Expanding the number of available seats is crucial to support York County's residents, workforce and the local economy.
- Both urban and rural communities are experiencing larger than typical ECE shortages. Addressing shortfalls will vary across community types and most likely include a combination of opening additional providers and expanding the number of seats at existing ECE locations.
- In the ECE provider survey, staffing stood out as the most pressing issue, with most respondents (89%) reporting difficulty with hiring new staff. Retaining existing staff was also difficult for over half of all ECE centers that participated in the survey. Respondents indicated that staffing issues created and worsened other problems, including classroom closures and providers' ability to improve their quality ratings.
- Only two providers surveyed offered non-traditional hours and weekend care. Two-thirds of providers reported they were not interested in offering care during non-traditional hours, indicating it could be difficult to increase this type of care for York County's residents and workforce.

ECE Gap Analysis for York County

Reinvestment Fund's ECE gap analysis consists of three steps: estimating supply, estimating demand, and identifying absolute and relative ECE shortages. The analysis is conducted at the Census block group level, which enables the identification of neighborhood-level trends and patterns.

Estimating Supply

Reinvestment Fund gathered information on ECE providers to estimate the number of seats available to families seeking care. Countywide there are 12,111 ECE seats available, 5,163 (43%) of which are highly rated (defined as providers with a STAR 3 or STAR 4 rating). Table 1 shows how ECE seats are distributed by provider type. Centers account for 88% of all and 91% of highly rated seats countywide.

Provider Type	**Provider Count**	**All Seats**	**Highly-Rated Seats (STAR 3 & 4)**
Center-Based Programs	91 (53%)	10,706 (88%)	4,713 (91%)
Home-Based Programs	44 (25%)	337 (3%)	39 (<1%)
Public Schools	8 (5%)	211 (2%)	211 (4%)
Independent Schools	2 (1%)	69 (<1%)	0 (0%)
Other (ex: religious orgs)	27 (16%)	788 (7%)	200 (4%)
Total	172 (100%)	12,111 (100%)	5,163 (100%)

Table 1

Figure 1 shows how the supply of ECE seats varies across York County at the block group level. Supply is most concentrated in the City of York, Shrewsbury, and Hanover. In more rural areas, there are often no seats accessible within a half-mile radius of each block group. These areas are shaded in gray hatching.

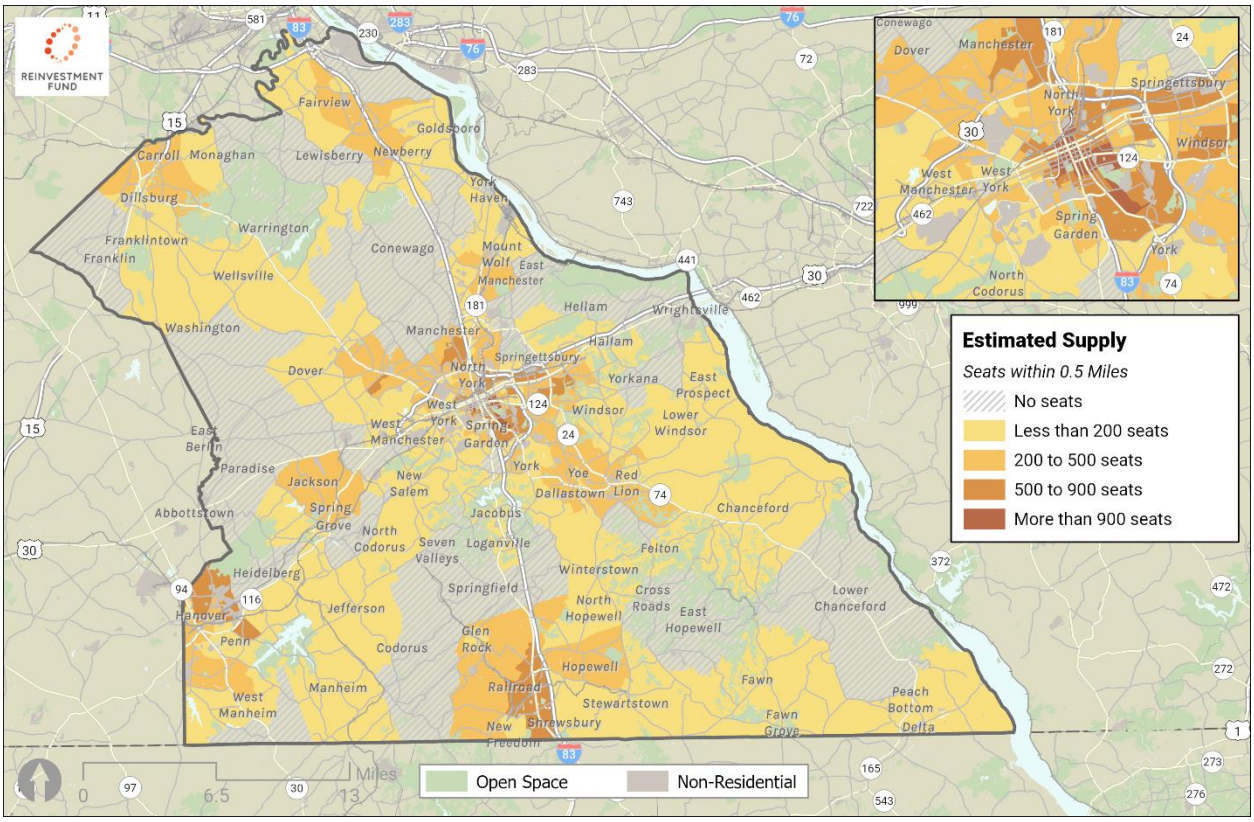


Figure 1

Estimating Demand

Not all households with children require education and care out of the home. Some children are cared for informally by friends or family members or privately by babysitters or nannies. And not all households seeking care will do so close to home; some families will look for care closer to their workplace. Reinvestment Fund estimates the maximum possible demand for ECE by starting with the number of children under five within a block group, adjusting that demand based on parental commuting patterns derived from the US Census Bureau, and then adjusting to estimate the impact of remote work.

Table 2 shows the total maximum demand for ECE care for several population centers across York County. There are 24,934 children under five years old countywide. A net estimated 3,302 children commute with their parents outside of the county, leaving 21,631 possibly seeking care in the county.

The City of York has the highest demand for ECE seats due to both its large residential population and its status as a destination for commuters; 12 percent of resident demand and 17

percent of commuter-adjusted demand is in York. Other townships near York such as Springettsbury and West Manchester also see large increases in demand due to the commuter adjustment. In contrast, bedroom communities like Manchester and Dover Townships see decreased demand.

Location	Resident Demand	Net Commuter Adjustment	Adjusted Demand
City of York	2,872 (12%)	+764	3,636 (17%)
Springettsbury Township	1,296 (5%)	+708	2,004 (9%)
York Township	1,473 (6%)	+106	1,579 (7%)
West Manchester Township	813 (3%)	+349	1,162 (5%)
Hanover	889 (3.5%)	+253	1,142 (5%)
Manchester Township	1,058 (4%)	-200	858 (4%)
Penn Township	977 (4%)	-158	819 (4%)
Dover Township	1,212 (5%)	-462	750 (3%)
York County	24,934 (100%)	-3,302	21,631 (100%)

Table 2

Figure 2 shows how the maximum possible demand varies across the county in more detail. Demand is particularly high in York County's population centers, including in and around the cities of York and Hanover. Block groups in those areas typically have more than 1,200 children under five living within a half-mile radius. In less populated areas in the western and southern parts of the county, demand is lower. Block groups there typically have fewer than 450 children under five living within a half-mile radius.

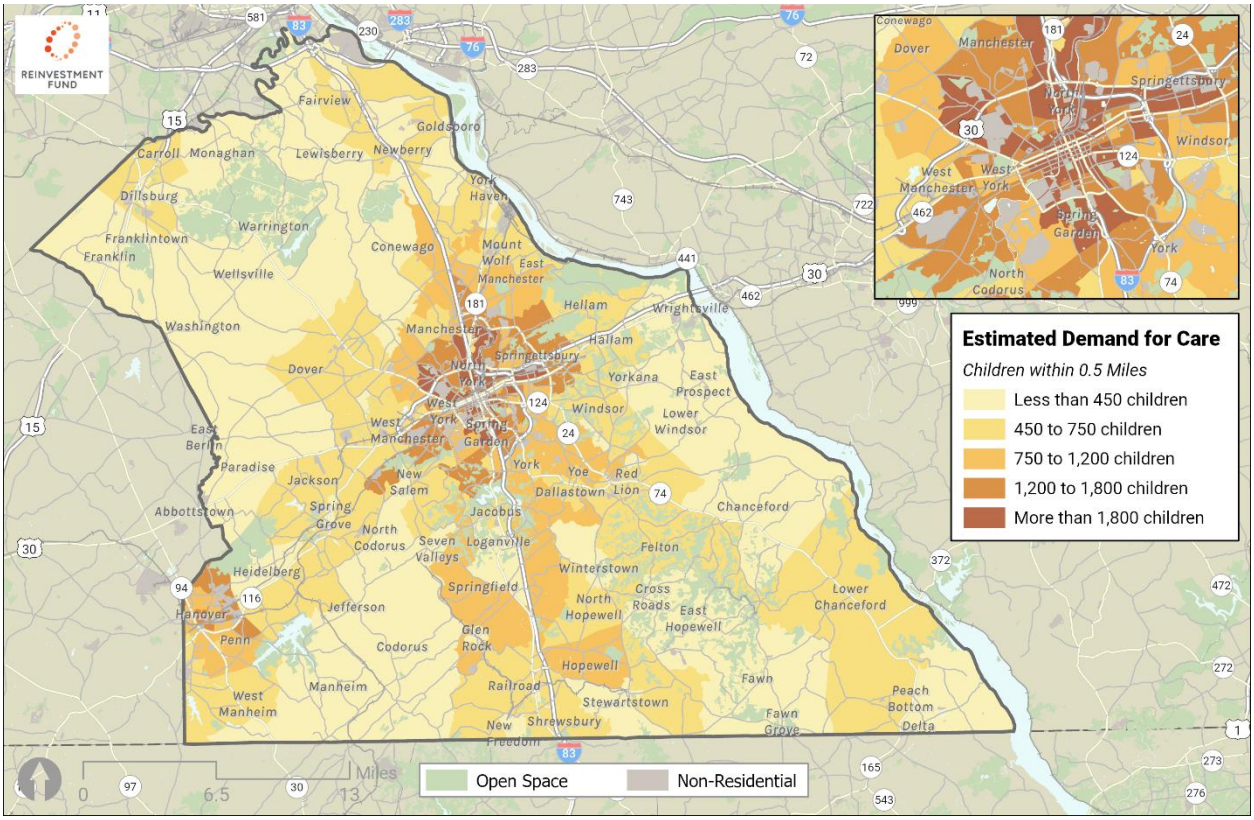


Figure 2

Estimating Shortages

Reinvestment Fund calculates two shortage estimates: *absolute shortage* and *relative shortage*. Each provides an important perspective on the ECE landscape and answers distinct questions. Absolute shortage describes the gap between supply and demand and answers the question: *"How many seats would need to be created to serve every child?"* Relative shortage estimates the typical relationship between supply and demand within the study area. It is used to answer questions like *"Where are the neighborhoods with the largest gaps?"* or *"Which areas could support additional capacity?"*

Absolute Shortages

Reinvestment Fund estimates the *absolute shortage* of ECE seats by combining the maximum number of children in need of ECE with information about the number and types of seats available within each block group. Countywide there is a shortage of ECE seats to serve the

maximum estimated number of children requiring care; shortages are common in many parts of the county.

Figure 3 shows the absolute gap between ECE seats and estimated maximum demand within each block group. Rural areas have smaller absolute gaps relative to more densely populated communities across the county due to their low population and limited number of providers. York, Hanover, and Shrewsbury have more varied absolute gaps, with large shortages and surpluses in adjacent block groups.

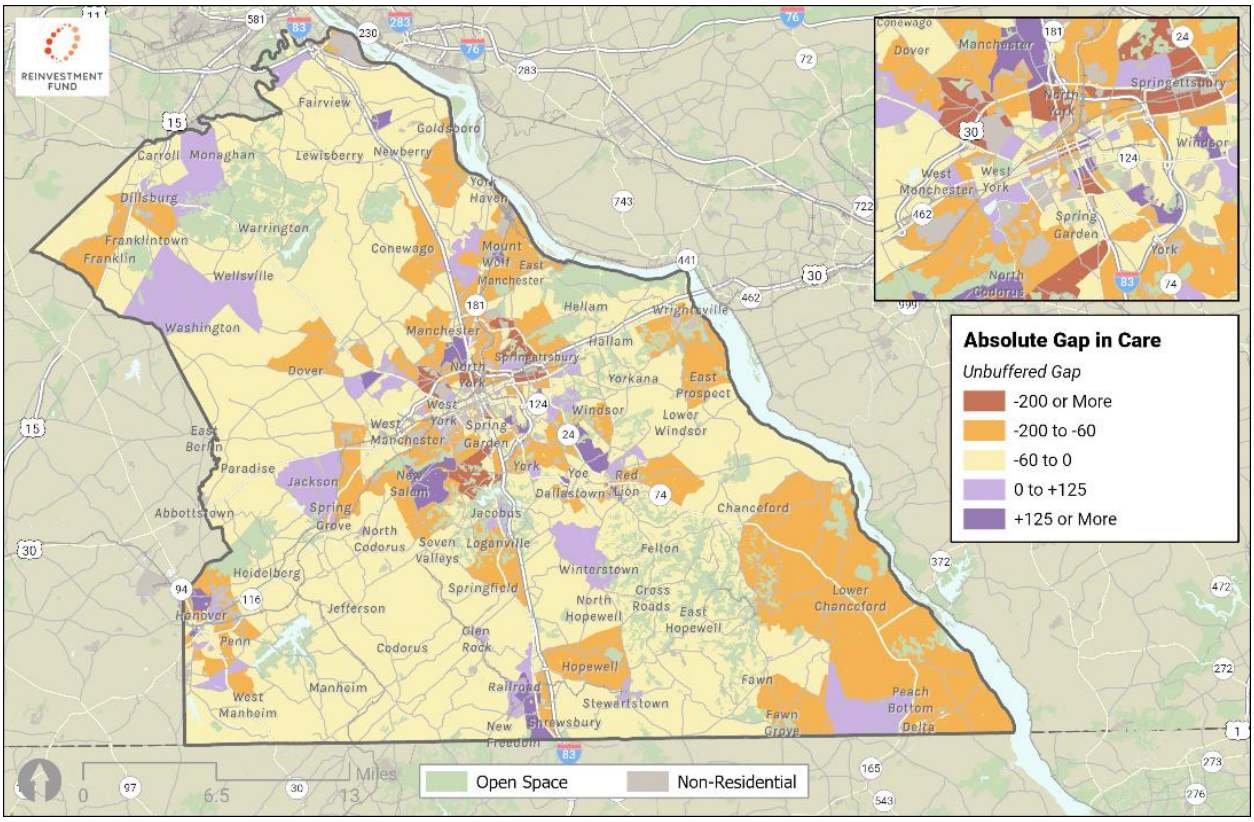


Figure 3

Relative Shortages

Given the estimated countywide ECE seat shortage of 9,520 seats, it is helpful to also calculate a *relative shortage* for each block group. This highlights areas where, relative to the region's market for ECE, the gap between supply and demand is especially large or small.

Across the county, 6,482 children live in block groups where the relative shortage is much larger than the typical countywide shortage. Figure 4 shows each block group's relative shortage, highlighting places where the shortage for care is particularly high. Lower Chanceford, Seven Valleys, Codorus, Wrightsville, and West York all have shortages of ECE seats that are much greater than other block groups in York County.

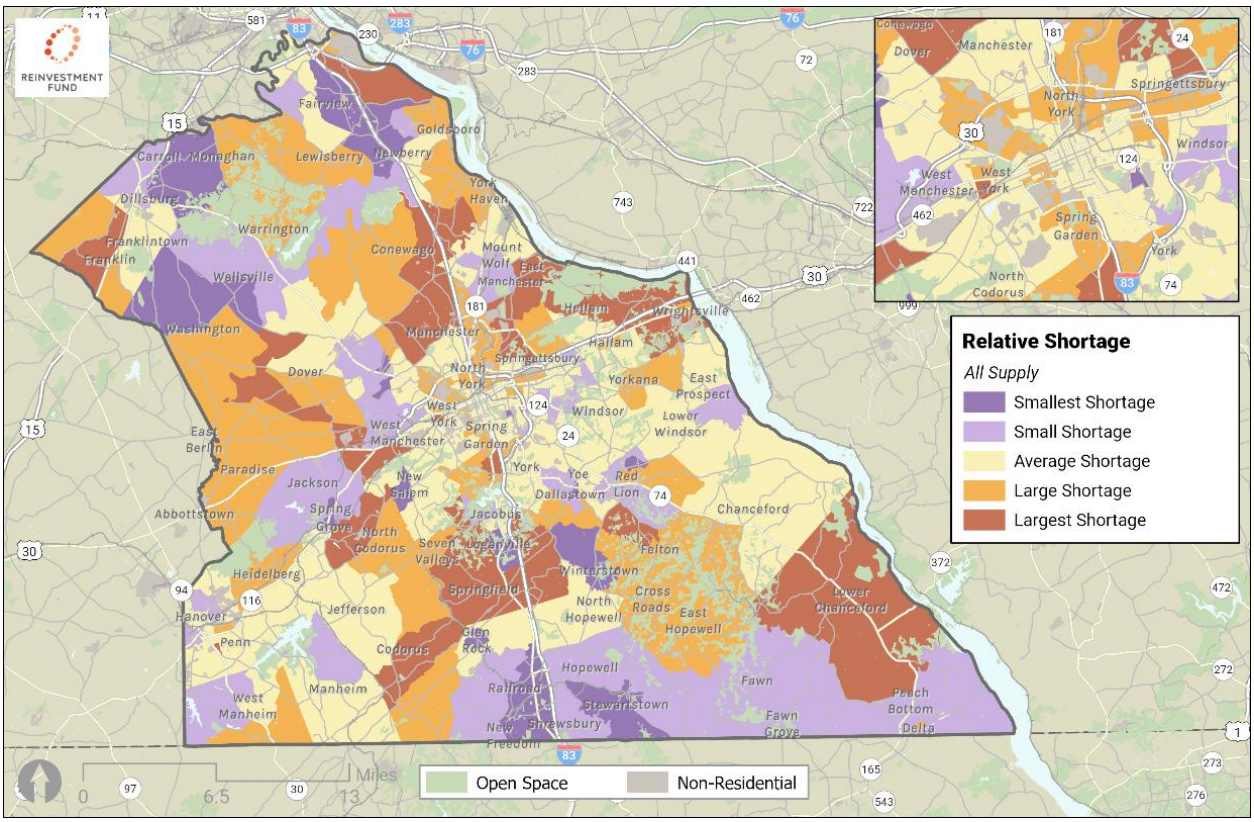


Figure 4

Provider Survey Results

The York County Provider survey was sent to 134 early childhood education providers across York County, including both center-based and family/group home providers. The survey was open from March 31 to May 5, 2025. The survey received 62 complete responses, for a response rate of 46%. The goal of the survey was to hear directly from providers to better understand their experiences, challenges, and needs in the ECE space.

Throughout the analysis, Family Homes and Group Homes are combined into one Group/Family Home category. STAR ratings are also collapsed: STAR 3 and STAR 4 providers are grouped into a "high quality" category, and STAR 1 and STAR 2 providers are grouped together.

Enrollment Trends

ECE Centers reported much larger enrollment and staffing numbers compared to Group and Family Homes. These differences are largely a reflection of the difference in business models between the provider types (Table 3). ECE Centers' larger size leads to greater challenges with classroom closures, staffing, and other issue areas.

	Enrollment			Staffing		
	Min.	Avg.	Max.	Min.	Avg.	Max.
Child Care Center (58)	11	56	160	1	12	38
Group/Family Home (15)	2	8	18	1	4	8

Table 3

Most providers had stable (42%) or increased (38%) enrollment over the last year (Figure 5). A higher share of ECE Centers experienced increased enrollment (41%). Family/Group providers serve fewer children and have less capacity to increase their enrollment.

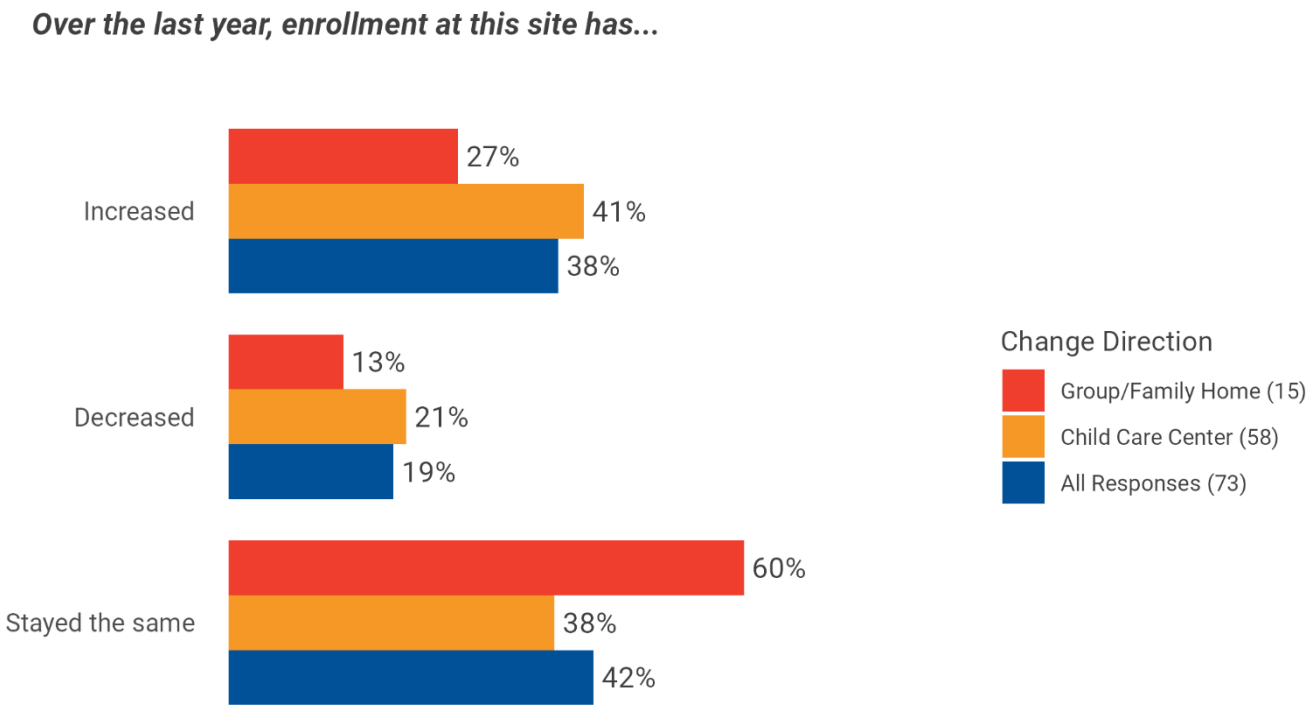


Figure 5

Waitlists

Most providers reported they had a waiting list. An even higher share of ECE Centers and STAR 3 & 4 (High Quality) providers had waiting lists compared with respondents overall. Among those respondents with waiting lists, toddler waiting lists were the most common (Figure 6). More ECE Centers had waiting lists for infants than Group/Family Home providers.

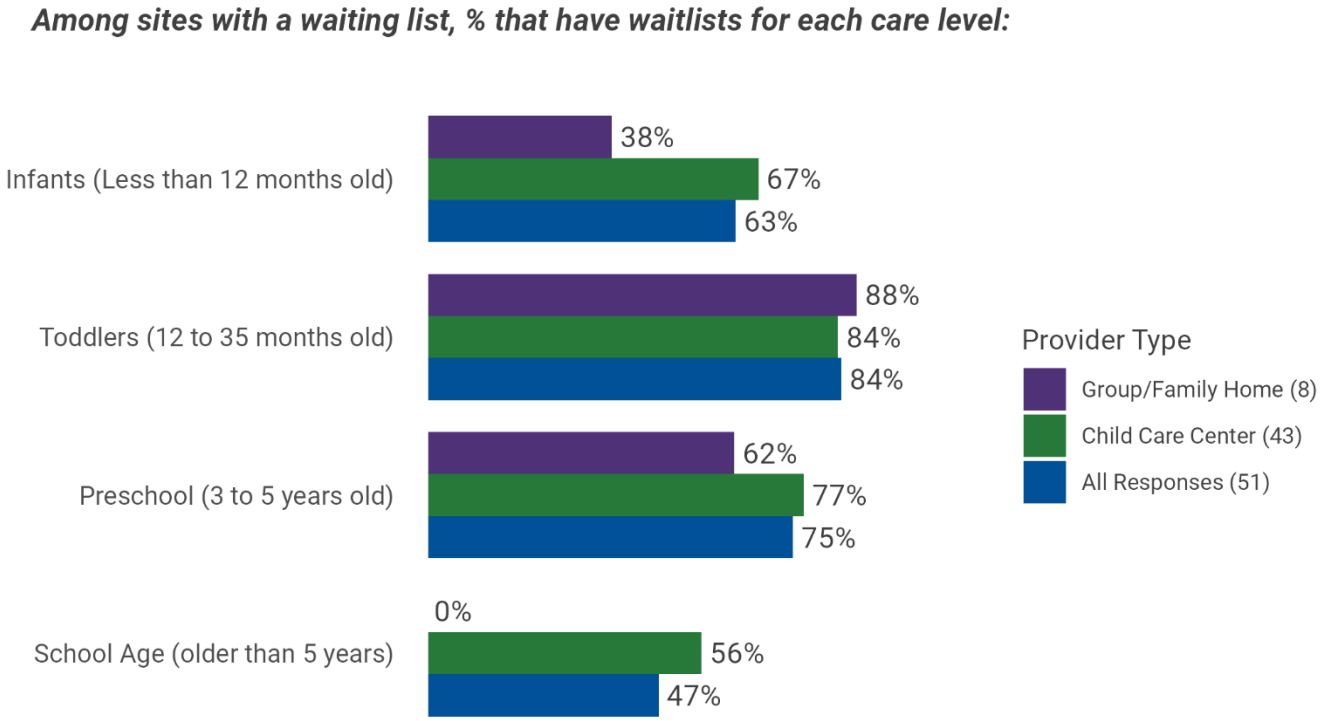


Figure 6

Languages Spoken

Spanish was the most frequently cited language spoken at respondents' sites other than English. A greater share of ECE Centers had Spanish speaking staff compared with Group/Family Home providers.

Non-Traditional Hours

Non-traditional hours were defined as 6pm-6am on weekdays and any time on weekends. Only two respondents—both group/family homes—said that they offer non-traditional hours. Two-thirds of respondents indicated that they were not interested in offering non-traditional hours.

Staffing

Staffing emerged as a major issue for respondents across the board, although ECE Centers reported more issues with staff compared with Group/Family Home providers. Family providers often have one staff person, the business owner, which explains the difference in staffing

challenges. Problems with staffing impacted providers' ability to increase enrollment and led to temporary classroom closures. Of the 13 providers who experienced a decrease in enrollment at one of their sites, the majority (85%) cited staffing as a major barrier.

About a third of ECE Centers reported having to temporarily reduce hours due to staffing issues at some point in the last five years. When ECE Centers were forced to close classrooms due to staffing shortages, 61% of respondents closed toddler classrooms (Figure 7). No Group/Family Home providers reported closing classrooms due to staffing issues.

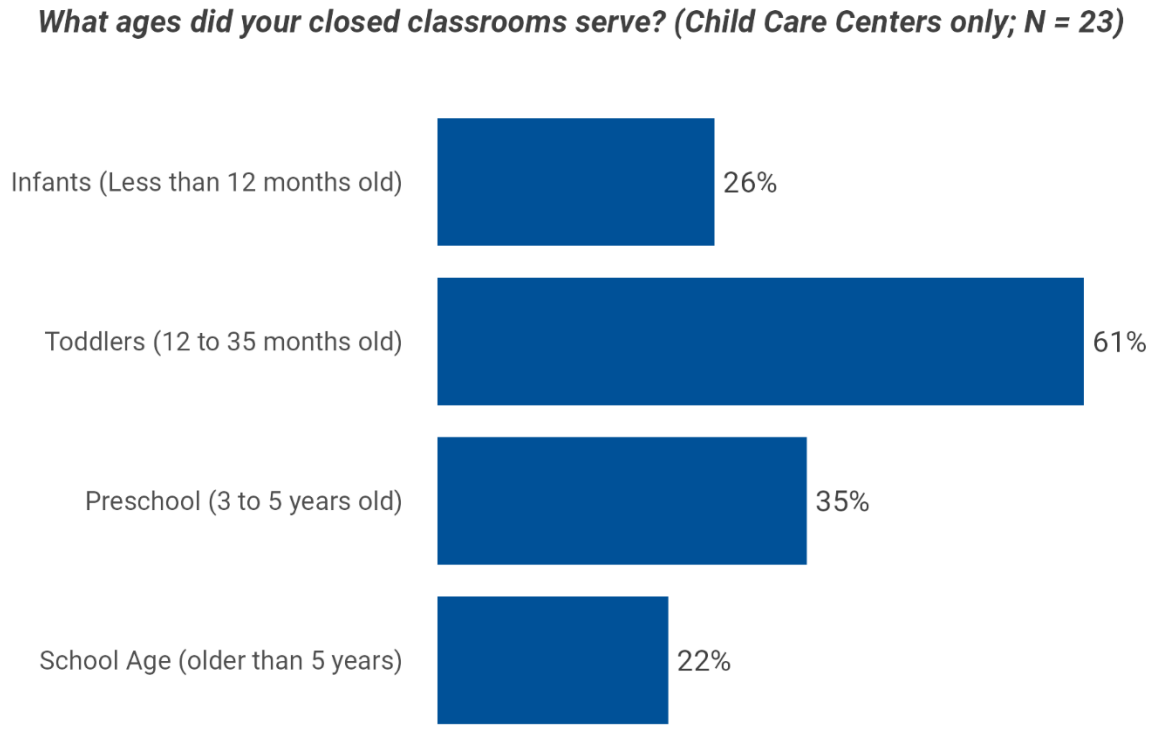


Figure 7

Hiring and Retention

Both ECE Centers and Group/Family Homes reported difficulty hiring new staff (88% of ECE Centers and 100% of Group/Family Homes). It is a particularly distressing finding given the impact of staffing on a provider's ability to increase capacity and remain open.

When asked about difficulty hiring new staff, ECE Centers reported a challenging mix of experiences (Figure 8). More than three quarters of ECE Centers reported that applicants were unwilling to accept the wages offered. Eighty percent of centers reported that applicants did not have the needed work experience, and 61 percent reported that there were not enough applicants for open positions. Taken together, ECE Centers are experiencing a difficult mix of a thin pool of applicants who are often unqualified or looking for higher wages.

Group/Family Home respondents did not report encounters with applicants lacking experience or looking for high wages as frequently as ECE Centers, though half also reported too few applicants. Family and group providers have fewer staff than centers and are less frequently in a position to require adding new staff. Most Group/Family Homes (62%) reported they had not experienced any of the difficulties listed when it came to hiring staff, due to typically having one employee for Family and less than four for Group (Figure 8).

Which of the following have you experienced with hiring staff during the last year in your child care or early learning location(s)?

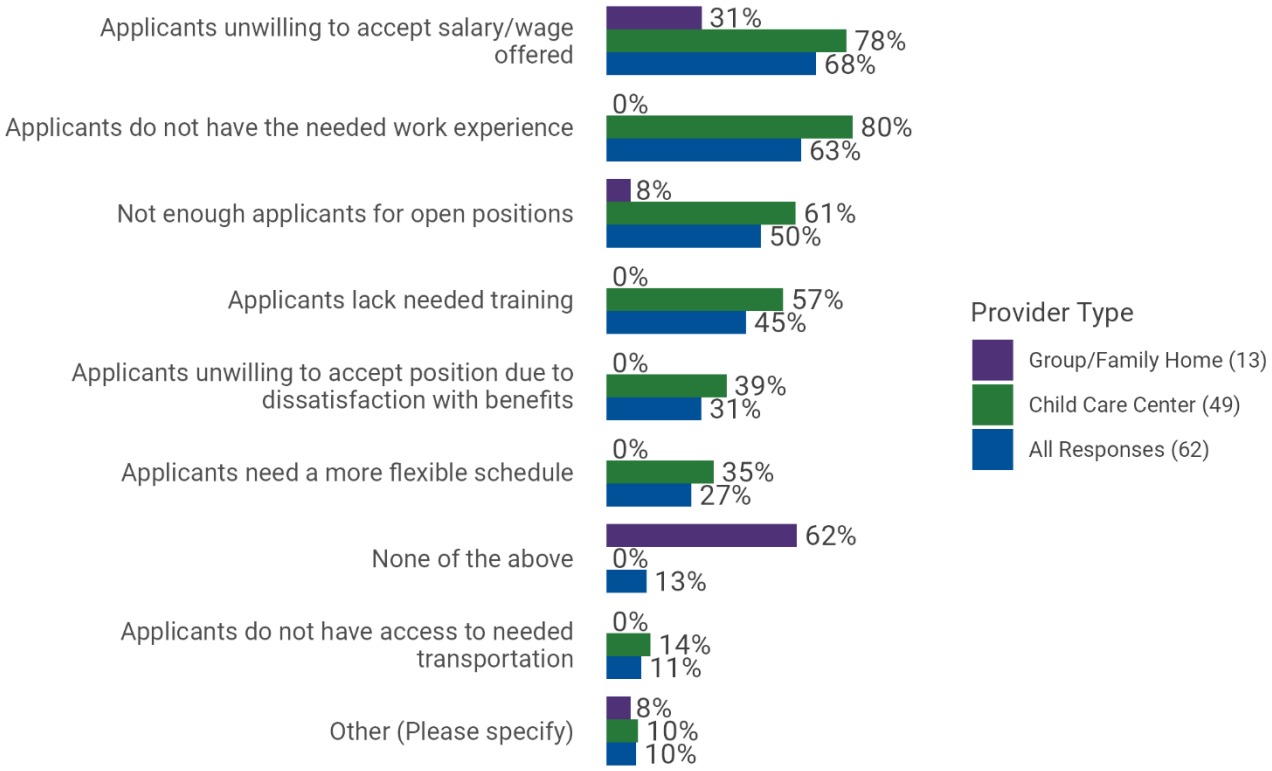


Figure 8

Employee Benefits

Respondents were asked about the types of benefits they offered their employees. There were stark differences by provider type: ECE Centers consistently reported offering more benefits than Group/Family Home care providers. Sixty-two percent of Group/Family Home providers did not offer any of the benefits listed in the survey, compared with just two percent of ECE Centers.

The most commonly reported benefits offered by ECE Centers were paid time off (88%), discounted ECE tuition (69%), and a retirement plan (47%). Paid time off was offered by only 31% of Group/Family Home providers.

Respondents expressed interest in a shared benefits pool, with a particular interest in health insurance, dental insurance, and retirement plans.

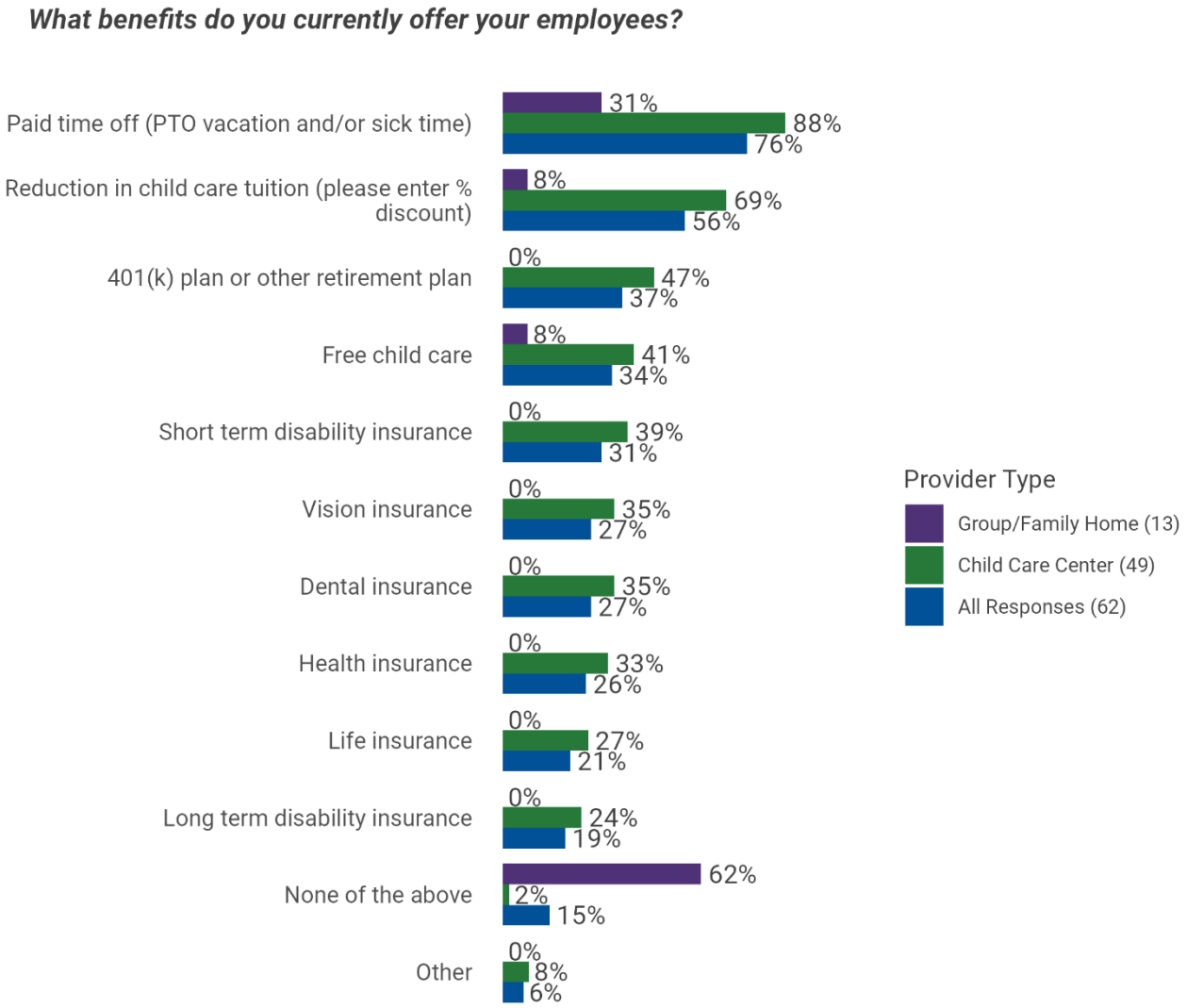


Figure 9

Facilities

About a third of all respondents reported their facilities had urgent facility improvements, repairs or maintenance issues. The most frequently cited facility improvements were outdoor learning environments, general remodeling, and bathrooms and plumbing.

Community Relationships

Respondents were asked about the types of relationships they maintained with various community entities and leaders. ECE Centers more frequently reported effective relationships with school district leadership, local elementary principals, and local elementary kindergarten teachers than Group/Family Home providers (Figure 10).

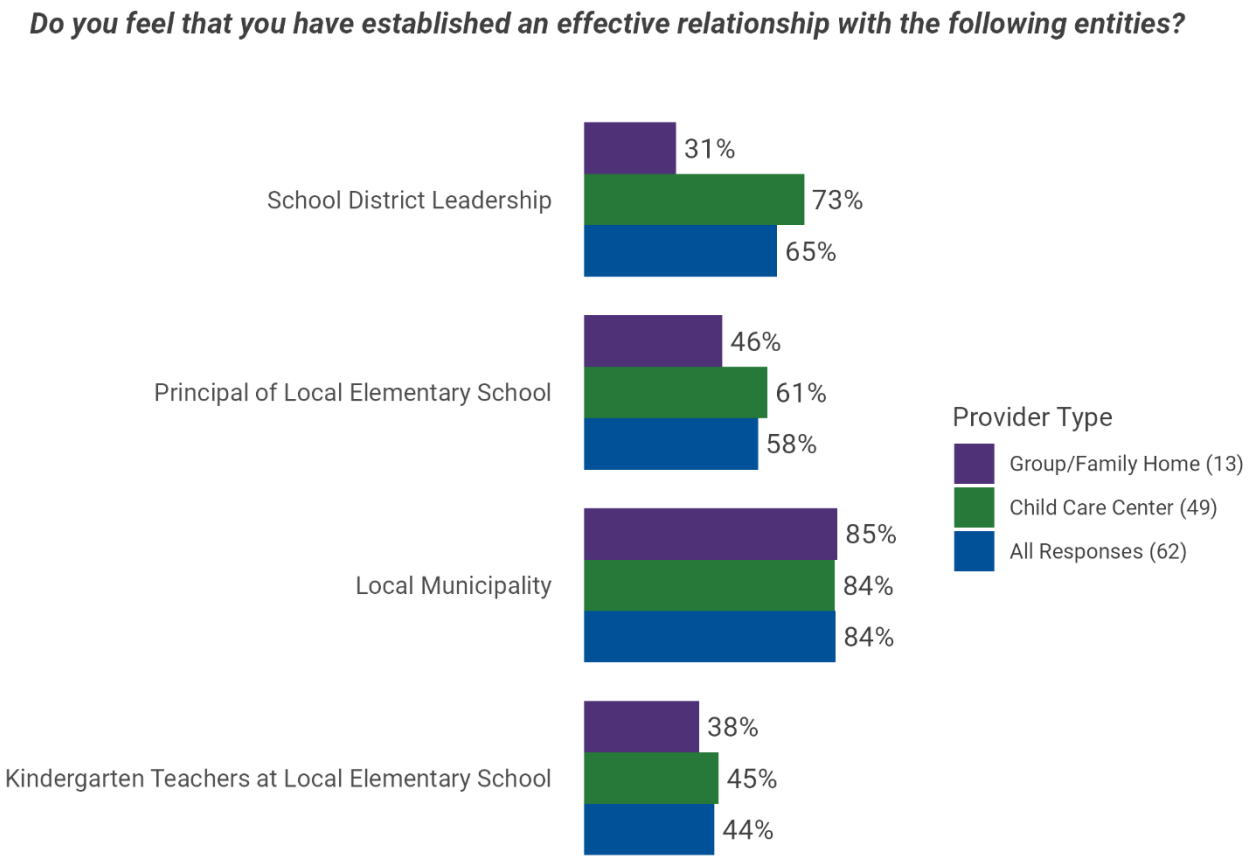


Figure 10

Provider Information

There were distinct differences between Group/Family Home providers and ECE Centers in terms of how they were organized and business longevity. All Group/Family Home providers were organized as for-profit businesses, in contrast to only 40% of ECE Centers. Overall, 87% of respondents reported being in business for more than 10 years, while only 3% had operated for less than one year. ECE Centers were more likely to have long-standing operations, with 92% open for over a decade, compared to 69% of Group/Family Home providers. Conversely, 8% of Group/Family Home providers had been open for less than one year, compared to just 2% of ECE Centers.

Participation in quality improvement initiatives was high across the board, with 95% of respondents engaged in Keystone STARS. ECE Centers reported higher rates of participation in additional quality initiatives than Group/Family Home providers, with two exceptions: the Child and Adult Care Food Program and the ECHO Teacher Aide program, where Group/Family Home providers showed greater involvement.

ECE Centers identified staffing challenges as the most significant barriers to improving quality measures, specifically the difficulty in hiring and retaining qualified staff. Additionally, the greatest share of respondents reported receiving funding from Child Care Works within the past year, highlighting its role as a key financial support mechanism for providers.

The Future of ECE in York County

The analysis presented in this report is the first provider survey and comprehensive assessment of the supply of, and demand for early childhood education in York County. The results are clear, there are approximately 21,600 children under five in York County who could be ECE customers, but only 12,100 available seats. The shortfall is felt countywide, both urban and rural communities are experiencing larger than typical ECE shortages. Through the survey, providers communicated that staffing is their most pressing issue. Respondents indicated that staffing issues had widespread impacts leading to classroom closures and making it more difficult to improve quality ratings. Understanding where shortages exist, and the barriers providers are facing, is critical for designing programmatic interventions and making targeted investments.

Reinvestment Fund has published a range of reports addressing critical public policy issues. To view additional education research projects, please **visit our Policy Publications site:**

WWW.REINVESTMENT.COM/IMPACT/RESEARCH-PUBLICATIONS

Every Child Has Opportunities (ECHO) is an early childhood education initiative in York County, Pennsylvania, led by Community Connections for Children and York County Economic Alliance. Funding partners include WellSpan Health, the J. William Warehime Foundation, the Powder Mill Foundation, United Way of York County, the Kinsley Foundation, and the York County Community Foundation.

The goal of ECHO is to double the number of children from low-income families in York County, PA who will receive high-quality early childhood education.

For more information, visit www.echoyork.org
For the York County PA early childhood education map, visit yorkcountypaecemap.policymap.com