National Family Child Care Landscape Survey

2026 Policy Brief

Family child care sustainability

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Chaos and Clarity

An educator-run research firm under Perfect Start Consulting

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Family child care educators often experience a fragmented system even though the whole system affects sustainability and professional recognition. Market changes, employment arrangements, funding, and regulations meet in the daily reality of operating a program. Conversations explain what the numbers mean for educators functioning in systems that may not have asked for their opinions.

Recognition means a place at the table, compensation and benefits, and access to funding that is not threatened. Clear pathways for safe, sustainable, culturally relevant programs also protect access for families.

Selected finding	Percent
Disagree or strongly disagree subsidy covers care costs	73.6% (106/144)
Disagree or strongly disagree FCC is professionally recognized	63.0% (92/146)
Agree or strongly agree market changes impacted program	57.5% (84/146)
No access to a substitute	56.8% (83/146)

This first-year study collected 146 responses from 28 states and paired selected findings with facilitated conversations and written submissions. The sample provides a starting look at participating educators' experiences and a basis for deeper state-level research.

Selected findings from the 2026 National FCC Landscape Survey. [1, 2]

Why These Findings Matter

State decisions aboutfunding,regulation, and preschool affect the same mixed-age programs. Reading thesefindings together helps explain what it takes for educators to stay open and what families may lose when programs cut hours or change the ages they serve.

Regulations Meet Business Realities

Among 146 respondents,37.0% agreed or strongly agreed thatlicensingregulations

support program sustainability. Among 144 answering the operating-change question, 50.7% said regulatory changes led them to change how they operate.

Reported adjustment	Percent of 78 follow-up entries
Enrollment numbers	44.9%
Increased administrative work	42.3%
Ages served	39.7%
Operating hours	34.6%
Staffing	21.8%

The follow-up includes 73 answering yes, three no, and two unsure on the preceding question. Adjustments could be selected together.

Conversations described children moving into preschool or school while existing age categories and ratios limited replacement enrollment. Others described increasing hours or retaining staff by reducing their own pay.

> “I’ve taken myself off of payroll a couple times. Like, decrease my own salary so I can maintain staffing.”

Regulations and sustainability go hand in hand. The business effects need to be part of conversations when requirements are developed.

Anonymous conversation excerpt. [1, 2]

Regulations Shape What Care Programs Can Offer

Aprogram can have an opening and still be unable toenroll a child of a particular age under existing age and ratio rules. States need to examine how enrollment rules, age categories, and ratios work together so they can uphold safety and best practices while protecting the care families rely on.

Funding and Family Affordability

Of 146 respondents,76.0%currentlyaccept subsidy. Onexperience questions offered to all respondents, 73.6% of 144 disagreed or strongly disagreed that reimbursement covers care costs, and 54.2% disagreed or strongly disagreed that payment timing is reliable.

Being able to accept subsidy is the starting point. What educators must cover and whether families are being helped also need examination.

> “I rely on stipends to offset drops in tuition”

Written responses and conversations described funding used for food, improvements, education, and operating expenses. They also described lost funding, enrollment uncertainty, and the difficulty of raising tuition to what operation requires.

Wider research provides context. Child Care Aware of America reported prices rose 29% between 2020 and 2024, while overall prices rose 22%. NAEYC’s 2026 survey reported tuition increases less often among publicly funded programs. [3, 4]

Funding, subsidy, income, costs, and affordability formed the largest main category in Q47: 40 of 144 entries. Experiences included both financial difficulties and higher subsidy rates helping educators hire.

Quote: anonymous Q36 written survey response. External studies provide context rather than establishing every cause in this sample. [1, 2]

Reimbursement Affects Whether Families Can Use Subsidy

When reimbursement falls shortof thecost of care or arrives unpredictably, educators have tocover the gap while paying operating expenses. That putspressure on programs to keep accepting subsidy and on families to find care they can afford.

Recognition and Workload

Recognition wasdebated in the facilitated conversations. Educators questionedwhy it so often means certificates and awards when what they need includes compensation, benefits, and requirements that recognize an already long working day.

Survey finding	Count and percent
Disagree or strongly disagree FCC is recognized	92/146 (63.0%)
Disagree or strongly disagree income is sustainable	75/146 (51.4%)
Agree or strongly agree administration affects work-life balance	78/146 (53.4%)
Work alone	76/146 (52.1%)

> “Not just like throwing a couple pennies our way, but health benefits and retirement access and matching”

Educators described paperwork at night and extending their own hours. Recognition in this research means tangible changes that allow educators to pay bills, care for themselves, and run their businesses with less stress.

On sustainable operating hours, 33.6% were neutral. Neutral requires further understanding; conversation examples do not establish why particular survey respondents chose it.

Anonymous conversation excerpt. Hours question: 146 answers. [1, 2]

Recognition Has to Change Working Conditions

Thefindings on income, administration, and working alone give state leaders a way to judgewhether recognitionisimproving educators’working conditions. With 56.8% reporting no access to a substitute, the ability to take time off belongs in that discussion alongside compensation, health care, and retirement.

Market Changes and Educator Inclusion

Among 146 respondents, 31.5% agreedand 26.0% stronglyagreed thatlocal market changes impacted their programs. Preschool, school provision, and changing ages served formed the largest main Q43 category: 44 of 144 entries.

Educators described preschool-age children leaving, changing hours or ages served, and difficulty replacing enrollment under existing rules. Some reported retaining children alongside preschool or benefiting from funded preschool participation.

> “I had a very full summer but everybody goes off to preschool and school and then my numbers have dropped drastically.”

The findings raise concern about FCC being left out or unheard when systems change.
The findings do not establish exclusion in every state or explain how every policy was developed.
Educators reported using intentional approaches. Of 144 respondents, 74.3% selected play-based learning, 62.5% selected mixed play-based and structured learning, and 56.9% selected relationship-based or social-emotional practice. Multiple choices were allowed.

What This Means for State Quality Systems

State quality systems should build on the intentional practices family child care educators already use. When quality programs assume educators are starting from scratch, the resources they offer can underestimate educators’ expertise and professionalism and offer too few opportunities to refine their practice. That mismatch can create barriers to participation, deepen inequities, and strain educators’ relationships with their communities and the state.

Anonymous conversation excerpt. [1, 2]

Preschool Expansion Can Affect Infant and Toddler Care

When preschool-age children leave a mixed-age program, the losttuition can affect the wholebusiness. If openings are difficult to fill under existing age and ratio rules, families may lose infant and toddler care, sibling placements, or hours that fit their work schedules. State and local plans should account for those risks as preschool expands.

Build Family Child Care Into State Early Childhood Plans

EnsureFCCEducators RepresentTheir WorkinStateandLocalDecisions

Seat practicing FCC educators on policy tablesandboards from the beginning and throughout planning. Their expertise in their work andcommunities is distinct fromthe role of agencies that develop and enforce regulations.

Consider Regulations and Sustainability Together

Uphold safety and best practices while examininghow enrollment rules,age categories, and ratios affect whether programs can stay open.Account for the costs educators absorbthrough their income, time, and labor.

Connect Professional Recognition With Compensation and Benefits

Make recognition tangible through compensation,health care, retirement, and accessto loans and grants.

Base Reimbursement on the Cost of Care

Operating in a home does not justify lowerreimbursement. Use the actual costs of providing family child care when setting rates.

Use State and Community Data Every Year

Pair annual surveys with facilitated conversations so educators can explain the numbers and help shape the response. Use those conversations to test assumptionsand identify unintended effects before deciding what changes to make.

About the Research

FCC associations, NAFCC state representatives, and resource and referral outreach helped recruit respondents. The survey ran January through July. Of 146 respondents, 87 (59.6%) volunteered for follow-up. Small Zoom conversations ran April through September and were supplemented by written submissions.

Findings describe a voluntary sample with uneven participation across 28 states. Written answers were grouped by main topic. Selected quotes are anonymous.

Sources

[1] ChaosandClarity. 2026 National Family Child Care Landscape Survey. Researcher-supplied English export (145 responses) and Spanish export (one response). State names and abbreviations standardized; equivalent response categories combined.

[2] Chaos and Clarity. National FCC Landscape Conversation Transcripts Compiled. Four conversation transcripts and accompanying chat logs. Anonymous conversation and chat excerpts.

[3] Child Care Aware of America. Child Care in America 2024 Price and Supply. Published May 2025. https://www.childcareaware.org/price-landscape24/

[4] National Association for the Education of Young Children. Child Care Affordability Crisis Deepening for Educators and Families. February 24, 2026. https://www.naeyc.org/node/6002

Chaos and Clarity is an educator-run research firm under Perfect Start Consulting. Deeper state-level research and growing partnerships are the next direction of this annual work.