



# Story County Child Care Feasibility Study Summary Report

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## Project Summary

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United Way of Story County (UWSC) and the Ames Regional Economic Alliance (AREA), in partnership with Iowa State University, engaged Pendulum Dependent Care Solutions (Pendulum) to conduct the Story County Child Care Feasibility Study. The study evaluated the county's child care landscape, identified system gaps, and developed a practical, community-driven roadmap to strengthen access, workforce stability, affordability, and long-term economic vitality across Story County.

Conducted between October 2025 and March 2026, the study combined quantitative analysis with extensive community engagement, including family, provider, and university surveys; focus groups; employer interviews; operator site visits; supply and affordability analysis; and geographic mapping aligned with workforce commute patterns. This approach provides a clear understanding of how child care access impacts families, providers, employers, and the broader regional economy, reinforcing its role as essential workforce infrastructure.

The study was organized into three phases to support a clear progression from analysis to coordinated action:

- **Phase 1** evaluated the current child care landscape, including supply, workforce conditions, affordability, and geographic distribution.
- **Phase 2** captured community demand and lived experiences to better understand barriers affecting families, providers, employers, and university-affiliated households.
- **Phase 3** translated findings into a strategic framework and phased roadmap designed to guide long-term system improvements and coordinated action.

**This study was conducted through a collaborative partnership among:**

### **Lead Partners**

- United Way of Story County
- Ames Regional Economic Alliance
- Iowa State University

### **Community Investors & Strategic Partners**

- City of Ames
- Story County Board of Supervisors
- Story County Medical Center
- Nevada Economic Development Council

Together, these organizations provided leadership, funding, expertise, and strategic guidance throughout the study process and will play an important role in advancing implementation of the study's recommendations.

## **Study Participation & Community Collaboration**

The Story County Child Care Feasibility Study was informed by extensive community engagement conducted between October 2025 and March 2026. The study combined quantitative analysis with stakeholder engagement to ensure recommendations reflected the experiences of families, providers, employers, and educational institutions throughout Story County.

### **Community Participation**

- 478 Parent & Caregiver Survey responses
- 60 Child Care and Family Child Care Provider Survey responses
- 708 Iowa State University Faculty, Staff, and Student Survey responses
- Provider site visits and focus group discussions
- Employer interviews and stakeholder engagement sessions
- Community partner consultation and implementation planning

More than 1,200 survey respondents, providers, faculty, staff, students, employers, and community stakeholders contributed to this study, reinforcing that child care is both a family support issue and a workforce and economic development priority for Story County.

### **Key Findings & Priorities**

The study identified several key findings shaping child care access, workforce stability, and long-term system sustainability across Story County. These findings informed the strategic priorities and implementation recommendations outlined in the report.

#### **Workforce Constraints**

- Workforce shortages are the primary constraint limiting child care capacity across Story County.

#### **Supply Gaps**

- Infant and toddler care remains the largest unmet need, driven by staffing ratios and operational costs.

#### **Affordability Pressures**

- Middle-income families face significant financial strain, limiting access to licensed care.

#### **Economic and Workforce Impacts**

- Child care access directly affects workforce participation, recruitment, retention, and regional economic vitality.

#### **Strategic Direction**

- Near-term strategies should prioritize stabilizing the existing system through workforce supports and coordinated investment.
- Long-term success will require shared leadership, braided funding, sustained investment, and cross-sector coordination.

### **System Challenges**

The study identified several interconnected challenges affecting access to reliable, affordable child care across Story County:

### Infant and Toddler Shortages

- Lower staff-to-child ratios and higher staffing requirements make these classrooms difficult to operate, resulting in long waitlists and the most significant system gap.

### Workforce Shortages Limiting Capacity

- Many providers have available classroom space but cannot fully staff classrooms or operate at licensed capacity. Workforce recruitment and retention challenges remain the primary constraint across the system.

### Affordability Pressures for Families

- Middle-income families who do not qualify for Child Care Assistance face significant financial strain, creating a persistent affordability gap.

### Impacts on Workforce Participation

- Families report reducing work hours, delaying workforce participation, or declining job opportunities due to child care barriers, while employers experience absenteeism, recruitment challenges, retention concerns, and productivity impacts.

### Geographic Misalignment

- Child care providers are concentrated in Ames, while many families commute from surrounding communities such as Nevada, Huxley, Story City, and rural areas, creating corridor-based access challenges.

### Key Indicators Demonstrate a System Under Strain

Story County Child Care Snapshot<sup>1</sup>

<b>~4,300</b>	<b>61%</b>	<b>15%</b>	<b>2.77×</b>
Licensed child care slots countywide	Providers limited by staffing shortages	Median-income budget spent on infant care	ISU infant demand vs staffed infant capacity <sup>2</sup>

*These indicators reinforce the study’s central finding: workforce shortages and affordability pressures continue to limit overall system capacity.*

A critical finding of the study is that workforce capacity—not physical space—is the primary limitation affecting child care access. As a result, near-term strategies should prioritize strengthening and stabilizing the existing system before pursuing large-scale facility expansion.

In addition, addressing these challenges will require a coordinated braided funding strategy. While the ASSET Process<sup>3</sup> provides a strong local foundation, it is not sufficient on

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<sup>1</sup> Source: Story County Child Care Feasibility Study analysis, including provider survey responses, supply analysis, ISU survey data, and affordability modeling (2025–2026).

<sup>2</sup> ISU demand analysis reflects survey responses from Iowa State University faculty, staff, and students.

<sup>3</sup> The ASSET Process is a collaborative community planning and funding framework developed in partnership with local stakeholders.

its own to meet system-wide needs. Sustained progress will require additional investment from employers, public partners, and philanthropic organizations, supported by a braided funding approach that aligns resources and ensures long-term sustainability.

### **Strategic Priorities**

To strengthen child care access, affordability, and workforce stability, the study recommends six coordinated strategies:

1. Stabilize the early childhood workforce through compensation, benefits, professional development, and pipeline partnerships
2. Unlock unused licensed capacity by addressing staffing shortages in existing programs
3. Expand infant and toddler care along key workforce commute corridors
4. Improve affordability through coordinated, layered funding strategies
5. Strengthen employer engagement as part of regional workforce infrastructure
6. Support family child care growth and flexible care models, particularly in rural and underserved communities

These priorities are designed to deliver immediate impact while building long-term system sustainability.

## **Path Forward: Leadership, Oversight, and Execution**

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Successful execution of the recommended strategies will require coordinated leadership, dedicated project management, and shared accountability across public, private, nonprofit, employer, educational, and provider partners.

### **Child Care Leadership Collaborative**

The study recommends establishing a Child Care Leadership Collaborative to:

- Align cross-sector partners
- Coordinate strategic priorities and action areas
- Support decision-making and shared accountability
- Monitor progress and shared outcomes
- Maintain long-term system alignment

### **Project Management and Coordination**

A dedicated project manager with child care operations experience should be identified to:

- Coordinate activities across partners
- Track progress against strategic milestones and KPIs
- Align funding and operational strategies
- Support provider engagement and operational readiness
- Identify barriers and facilitate problem-solving
- Maintain momentum and accountability across all phases

This coordinated leadership structure will help ensure that strategies remain organized, actionable, and sustainable over time.

### **First 60–90 Days: Immediate Next Steps**

The first 60–90 days represent a critical transition period from planning to coordinated action and will establish the operational foundation for long-term success.

Priority actions include:

- Establishing the Child Care Leadership Collaborative
- Confirming participating organizations and governance structure
- Identifying a lead convener and dedicated project manager
- Aligning near-term priorities and strategic action areas
- Coordinating braided funding opportunities across employers, philanthropy, and public partners
- Engaging providers and employers in early coordination activities
- Establishing a regular phased action timeline, communication cadence, and accountability structure

This initial coordination period is essential to building alignment, maintaining momentum, and preparing the community for phased action and long-term system advancement.

### **Strategic Roadmap**

The strategic roadmap provides a phased, action-oriented approach designed to stabilize the current system while supporting sustainable long-term expansion.

#### **Near-Term (0–6 Months): Stabilize and Launch**

- Launch workforce stabilization efforts
- Reopen unused licensed capacity
- Convene employer partners and workforce discussions
- Begin affordability and funding coordination efforts
- Develop substitute teacher pools and workforce pipelines
- Initiate ASSET Process enhancements

#### **Mid-Term (6–18 Months): Expand and Pilot**

- Expand infant and toddler capacity in priority corridors
- Launch affordability pilots and employer-supported initiatives
- Operationalize substitute staffing supports
- Expand workforce development partnerships
- Support growth of family child care providers

#### **Long-Term (18–36 Months): Scale and Sustain**

- Scale successful workforce and affordability initiatives
- Expand employer-supported child care models
- Continue targeted infant and toddler expansion
- Refine funding strategies using performance and utilization data
- Monitor progress through shared KPIs and system dashboards

## **Sustaining Progress**

The feasibility study provides Story County with a coordinated strategic framework and tools to support long-term progress, including:

- A comprehensive data package and system mapping analysis
- A phased strategic roadmap
- Key performance indicators and measurement tools
- Governance and leadership recommendations
- Funding and affordability strategies
- Workforce stabilization and employer engagement models

These tools position Story County to monitor progress, refine strategies over time, and support long-term system sustainability.

## **Conclusion**

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Child care is essential infrastructure supporting Story County’s families, workforce, and long-term economic vitality.

This study provides a clear, community-driven, and action-focused roadmap to stabilize the early childhood workforce, expand access to infant and toddler care, improve affordability, and strengthen employer engagement across the region.

The findings confirm that workforce capacity—not physical space—is the primary constraint limiting child care availability. As a result, the recommended approach prioritizes strengthening the existing system through coordinated leadership, workforce investment, and targeted expansion strategies.

Achieving measurable progress will require sustained collaboration, shared accountability, and a braided funding approach aligned across employers, public partners, philanthropy, and community organizations.

With coordinated leadership, dedicated project management, and sustained investment, Story County is well-positioned to move from planning to coordinated action, creating lasting impact for families, providers, employers, and the broader regional economy. The opportunity now is to move from planning to implementation, aligning leadership, investment, and action to create a stronger child care system that supports families, employers, and the long-term economic vitality of Story County.