



WILLING, BUT NOT ABLE?

Expansion Issues Across
Multi-Site Child Care Operators In
Ontario

RESPONSES FROM A SURVEY ACROSS ONTARIO

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Contents

The Survey	3
The Results	3
Auspice	9
Size (Number Of Centres)	10
Size (Total Licensed Capacity Of Multi-Site Groups)	12
Participation in the \$10 a day program (CWELCC)	14
Interest in expansion	18
Actual and planned expansion	21
State of expansion actions	24
Financing expansion	28
Supports	36
Supports still needed	38
Financial health of multi-site child care organizations	41
Conclusion	44

Summary

The Survey

- The survey was conducted in late 2024 by Building Blocks for Child Care (B2C2).
- This is a report on results from 52 multi-site child care operators. The report on stand-alone centres will follow.
- The main purposes were to assess actual expansion since the federally-funded CWELCC program began (2022 in Ontario), the intentions for future expansion, and the barriers/supports affecting growth.

The Results

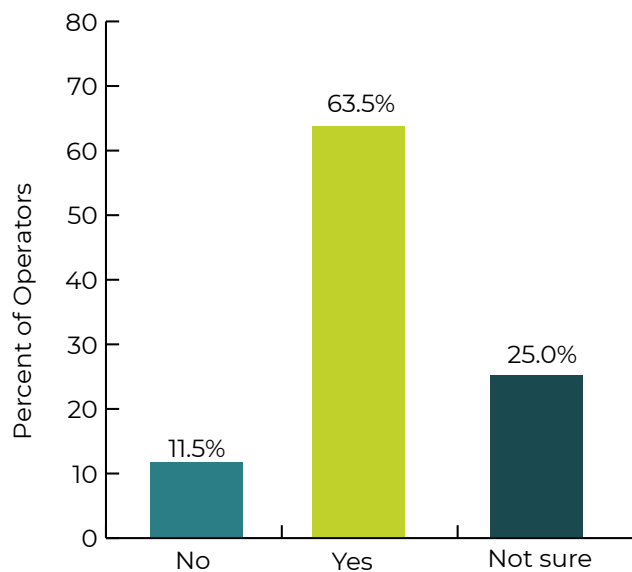
The survey results reveal a clear and urgent truth: Ontario's multi-site child care operators are interested in expansion and willing to expand, yet their ability to do so is constrained by persistent, systemic barriers. While the CWELCC program has lowered parent fees, increased demand, and sparked some growth since 2022, expansion remains uneven. As our survey results show, non-profit multi-site child care providers face ongoing staffing shortages and financial uncertainty. For-profit multi-site providers identified inconsistent access to CWELCC participation and funding as major barriers to their expansion as of late 2024.

The most pressing obstacles—staff recruitment and retention, secure and adequate operating funding for new services, and lack of grant or loan funding for capital investment—are not insurmountable, but they require government actions and supports, especially to facilitate non-profit expansion. Operators have demonstrated initiative, with most already taking concrete steps toward expansion, yet without adequate and guaranteed future operational funding, robust workforce strategies, and meaningful capital support, these plans risk stalling.

If Ontario is to meet the urgent demand for affordable, high-quality, predominantly non-profit and public child care, governments at all levels must act now. That means:

- Guaranteeing future operational funding that fully covers the costs of expansion and ongoing delivery.
- Investing in the workforce through competitive wages, benefits, and long-term retention strategies for all early childhood educators.
- Providing capital grants, loan guarantees, and access to municipal or school board space to lower the barriers to building or retrofitting facilities.
- Our survey results say that multi-site operators have the interest, commitment, and readiness to deliver child care spaces that families need. The question is whether the policy and funding environment will empower them, and the children and families that depend on them, to succeed.

Percent of Multisite Operators Interested in Expansion



Data from Survey of Operators, 2024 by Building Blocks for Child Care (B2C2)

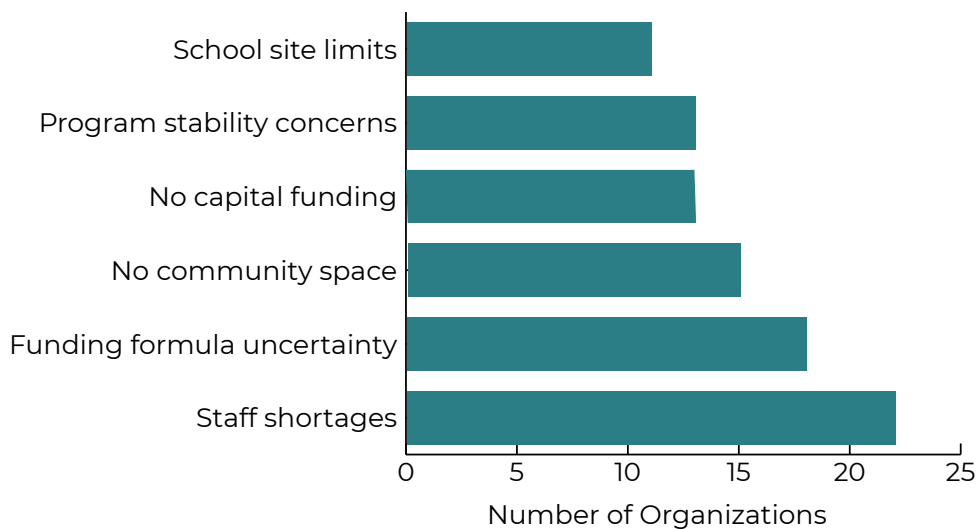
Expansion Interest

Most multi-site organizations expressed an interest in expansion (64% interested, 25% unsure, 12% with no interest). Among those interested or unsure, nearly 78% are likely or very likely to expand within the next five years. Planned expansions are mostly for 1-99 spaces, though some for-profits plan >500 spaces.

Barriers to Expansion

Over 70% of multi-site operators reported barriers to expansion. Most frequently cited were staffing shortages (22 organizations), insecure funding formula (18), and lack of capital funding (13). Other notable barriers included a lack of community space for expansion and concern about program stability. Note that this survey was conducted shortly before the new operational funding formula was implemented in January 2025.

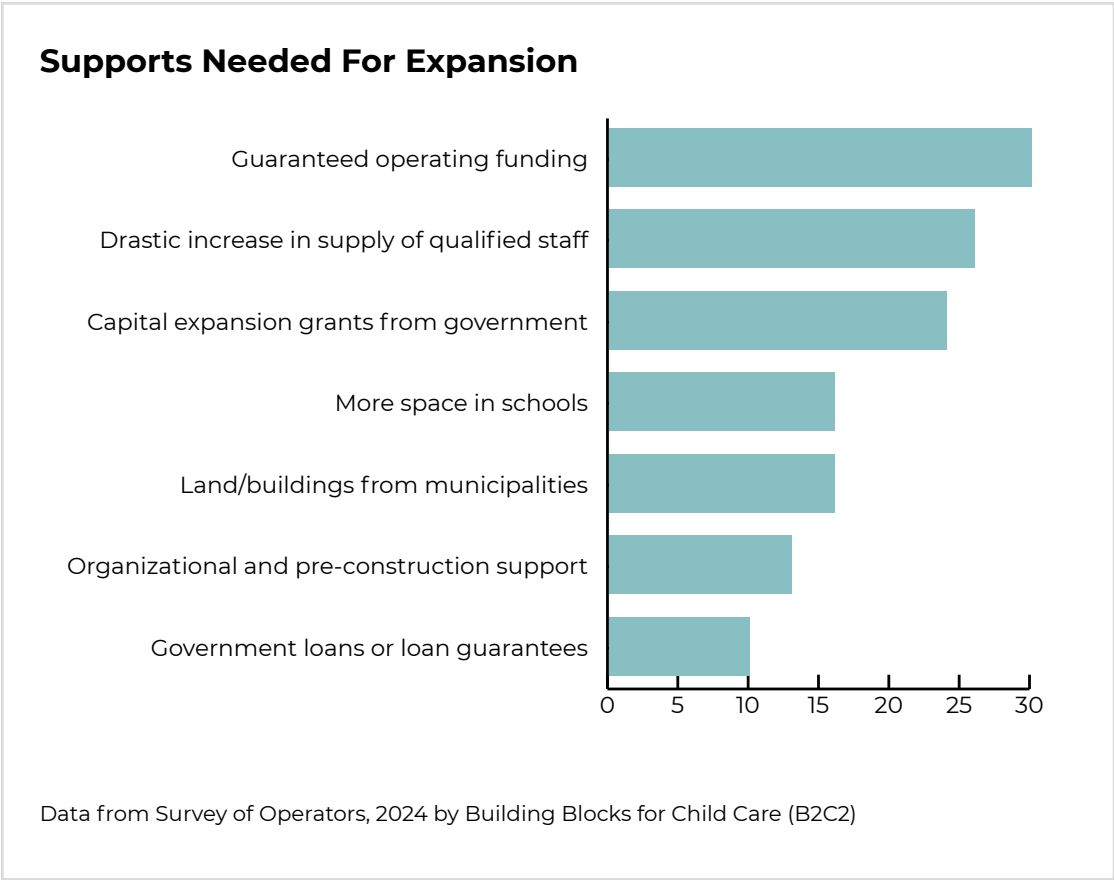
Top Barriers to Expansion



Data from Survey of Operators, 2024 by Building Blocks for Child Care (B2C2)

Supports Needed for Expansion

Operators identified several supports needed for expansion: guaranteed operating funding (30 organizations), increased qualified staff supply (26), capital grants (24), and access to land or buildings through municipalities and space in schools (16 each), and organizational and pre-construction support (13), and government loans or loan guarantees (10).



Financial Health Since 2022 in Ontario

Financial outcomes are mixed. Across the sector close to one-quarter report better financial health, one-quarter report worse financial health and about half report that things are about the same. However, the pattern is different for non-profits vs. for-profits. About 19% of non-profit multi-site operators reported improved financial health compared to 44% of for-profit multi-sites. Roughly 25% of the non-profit organizations and 33% of the for-profits reported declines in financial health. About 56% of non-profits reported that their financial health was stable, while this was true for only about 22% of for-profit multi-site operators.

Staffing

Staff shortages are a pressing issue. Of the respondents to one question, about 52% of non-profits said staff shortages have forced them to reduce capacity, compared to none of the for-profits.

Voices from a Range of Operators

Concerns raised to the Minister of Education:

- Wage levels and fairness across centres.
- Stability and transparency of CWELCC funding.
- Need for more expansion support, especially for infants and school-age children.
- Calls for inclusion of for-profits in CWELCC supports.
- Access to land and municipal space.

Retention/recruitment initiatives:

- Higher wages, benefit enhancements, pensions, staff wellness initiatives, flexible work schedules.
- Some cannot afford raises under current funding rules.

Policy Needs:

- Stability of CWELCC beyond 2026.
- Transparent, fair funding formula.
- Wage grid for educators across the sector.
- Greater access to capital funding and municipal land.
- Expanded supports for staff recruitment and retention.

Conclusions

Multi-site operators are keen to expand and many already have, but face serious barriers: Amongst the most serious are staffing shortages, uncertainties of operating funding going forward and lack of provision of capital grants and loans.

While CWELCC has enabled some growth, expansion is uneven—non-profits struggle more with staffing and finances, while for-profits are concerned about CWELCC participation and funding-access issues. Operators seek stronger government support, guaranteed operational funding that covers costs of new centres, and workforce strategies to make expansion sustainable.



If given the opportunity to speak with Jill Dunlop, I would tell her to get informed about child care and the importance of these programs. That she needs to spend time in the centres, working before she can make decisions about the field from her high horse.

- *Survey respondent*



Report on Survey of Multi-Site Operators

This survey was conducted in late 2024. Child Care operators across the province were asked to fill out a lengthy online survey about actual recent expansion of capacity and intentions and barriers to expansion. Of the respondents, 134 were operators or directors of stand-alone centres, 52 were directors, CEOs, or owners of multi-site child care operations. There was another group of multi-site operators who were asked to fill in a simpler version of the survey as part of a test of the questionnaire. For relevant questions that were similar across the earlier and later versions of the questionnaire, we include the respondents to the test questionnaire in the tabulated results.

Stand Alone Centres and Multi-site Centre Groups in Ontario, 2024		
Stand-alone or Multi-site centre	Frequency	Percent
Stand-alone centre	139	72.8%
Multi-site centre group	52	27.2%
Total	191	100.0%

Data from Survey of Operators, 2024 by Building Blocks for Child Care (B2C2)

This report tabulates and analyzes results for Multi-Site operators only. A second report will tabulate and analyze results for stand-alone centres.

The overall story for multi-site operators is a positive one with qualifications. Multi-site child care operations in Ontario are willing and anxious to expand the supply of child care services. Many have already done so and want to do more. However, the road to expansion is rough, with potholes and barriers. We can learn a great deal from what these operators say about the barriers to expansion.

Auspice

About 77% of the multi-site respondents were not-for-profits, with most of the rest being for-profits. Because there is only one public sector child care multi-site organization in the survey responses, we usually include the results for this organization with non-profit responses..

Auspice of multi-site centre organizations in Ontario, 2024

Auspice of multi-site groups	Frequency	Percent
not-for-profit	40	(76.9%)
for-profit	11	(21.2%)
public	1	(1.9%)

Data from Survey of Operators, 2024 by Building Blocks for Child Care (B2C2)

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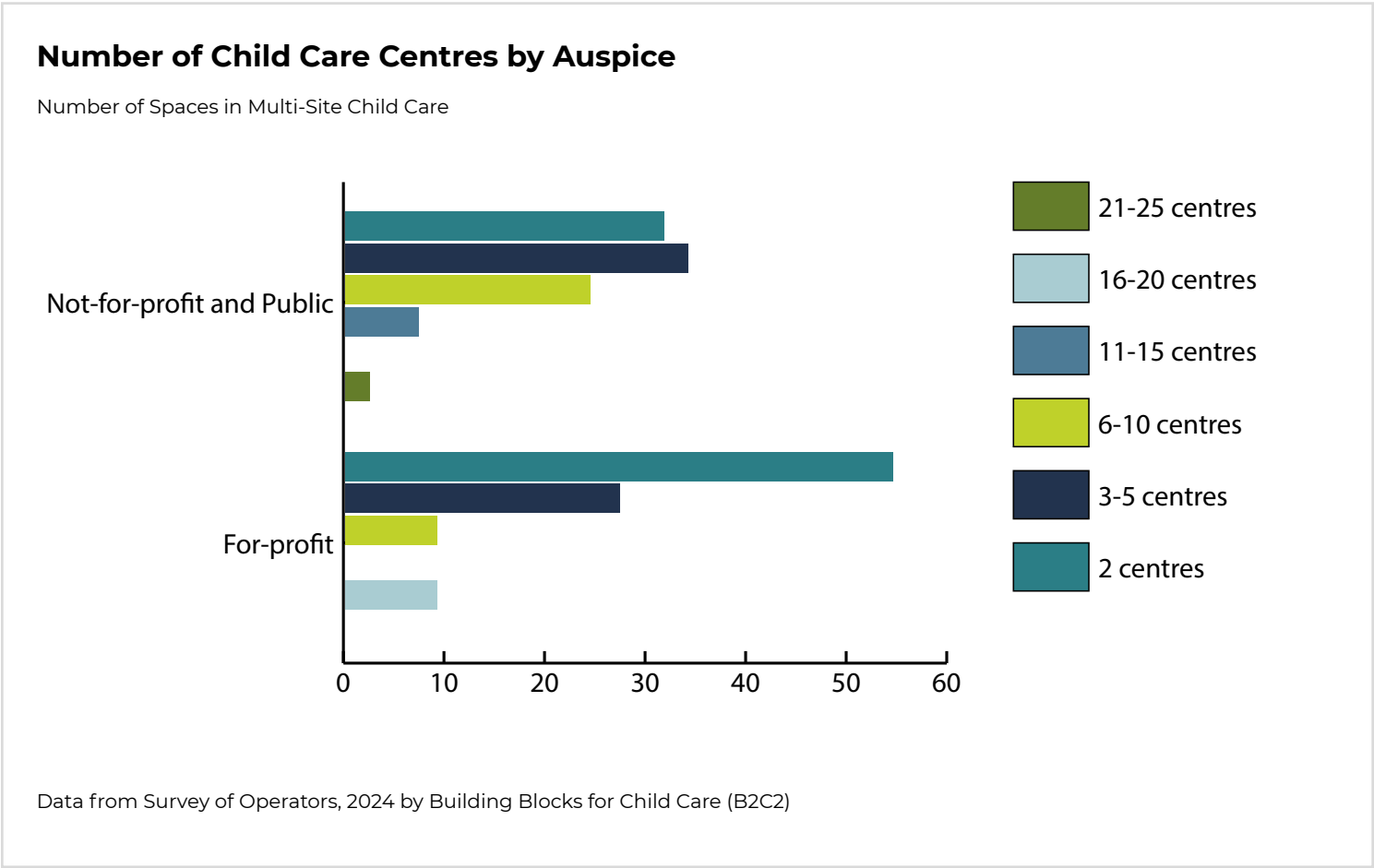
Francophone staff should receive a premium when working in French to support the retention of those staff.

- *Survey respondent*

”

Size (Number Of Centres)

Many of these multi-site groups (36 of 52) operate 5 centres or fewer. Others operate larger numbers of centres as the table below shows. This is not entirely representative of the population of multi-site centres in Ontario as there are a number of much larger multi-site operations, especially non-profits. Some of these were excluded from answering the final version of the survey because they had already helped us by answering the pilot version.



Number of centres in multi-site groups by auspice of group, Ontario, 2024

	Auspice of multi-site groups		
	Not-for-profit and public	For-profit	Total
Number of centres (includes schoolage)			
2 centres			
frequency	13	6	19
percent	(31.7%)	(54.5%)	(36.5%)
3-5 centres			
frequency	14	3	17
percent	(34.1%)	(27.3%)	(32.7%)
6-10 centres			
frequency	10	1	11
percent	(24.4%)	(9.1%)	(21.2%)
11-15 centres			
frequency	3		3
percent	(7.3%)		(5.8%)
16-20 centres			
frequency		1	1
percent		(9.1%)	(1.9%)
21-25 centres			
frequency	1		1
percent	(2.4%)		(1.9%)
Total			
frequency	41	11	52
percent	(100.0%)	(100.0%)	(100.0%)

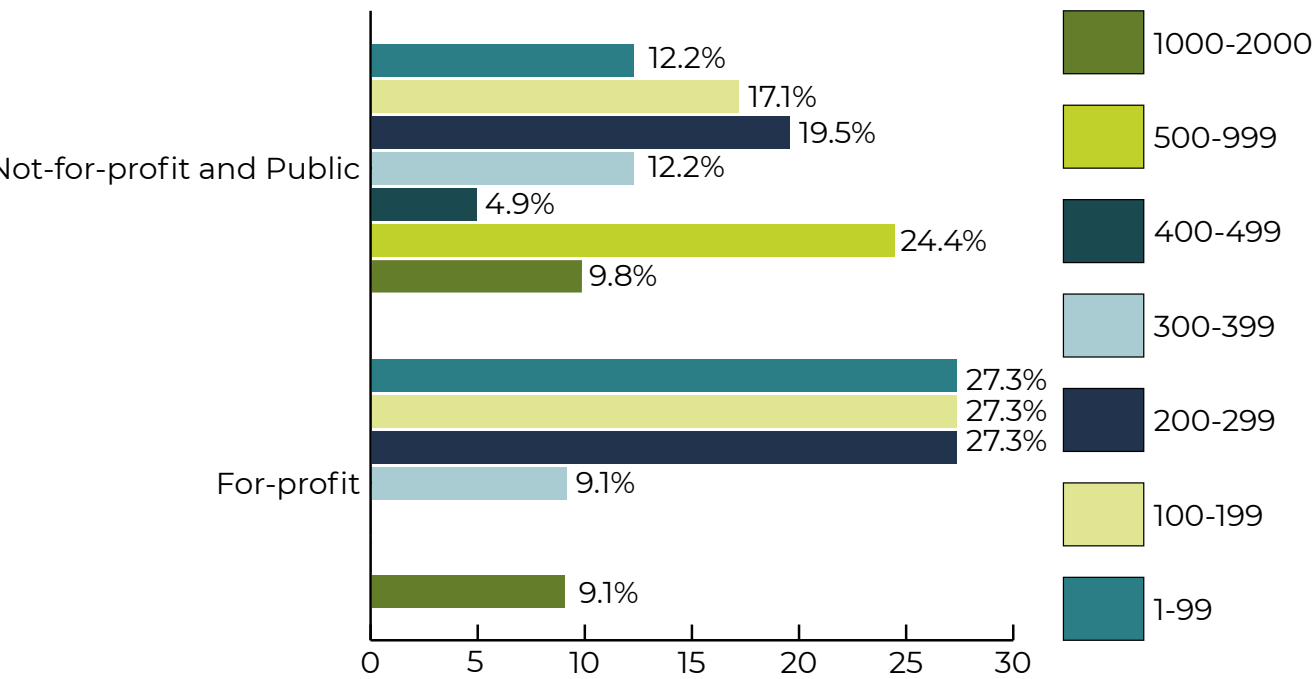
Data from Survey of Operators, 2024 by Building Blocks for Child Care (B2C2)

Size (Total Licensed Capacity Of Multi-Site Groups)

Many of these multi-site groups have substantial numbers of licensed spaces. For example 34 out of the 52 respondents have licensed capacity of 200 spaces or greater. 15 have licensed capacity of 500 spaces or more.

Licensed Child Care Capacity by Auspice

Number of Spaces in Multi-Site Child Care



Data from Survey of Operators, 2024 by Building Blocks for Child Care (B2C2)

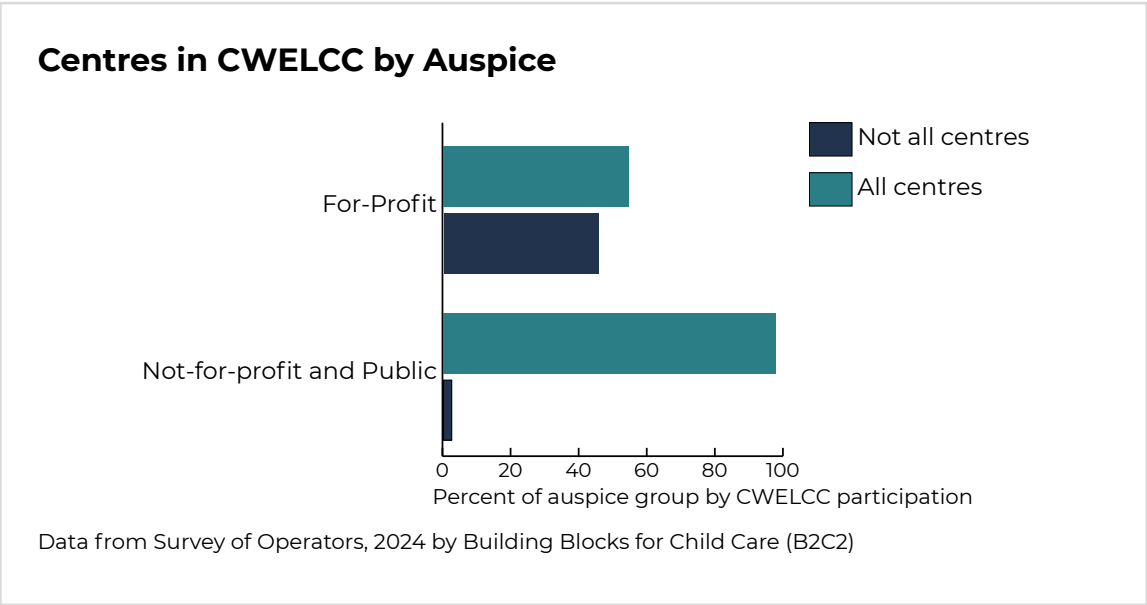
Total licensed capacity of multi-site child care groups, Ontario, 2024

	Auspice of multi-site groups		
	Not-for-profit and public	For-profit	Total
Licensed capacity of multi-site child care groups, including schoolage			
1-99			
frequency	5	3	8
percent	(12.2%)	(27.3%)	(15.4%)
100-199			
frequency	7	3	10
percent	(17.1%)	(27.3%)	(19.2%)
200-299			
frequency	8	3	11
percent	(19.5%)	(27.3%)	(21.2%)
300-399			
frequency	5	1	6
percent	(12.2%)	(9.1%)	(11.5%)
400-499			
frequency	2		2
percent	(4.9%)		(3.8%)
500-999			
frequency	10		10
percent	(24.4%)		(19.2%)
1000-2000			
frequency	4	1	5
percent	(9.8%)	(9.1%)	(9.6%)
Total			
frequency	41	11	52
percent	(100.0%)	(100.0%)	(100.0%)

Data from Survey of Operators, 2024 by Building Blocks for Child Care (B2C2)

Participation in the \$10 a day program (CWELCC)

The large majority of the multi-site respondents to the survey have all of their centres participating in the \$10 a day (Canada-Wide Early Learning and Child Care or CWELCC) program. Only 6 of the multi-site groups do not. 5 of these are for-profit operations. Even for these “non-participants”, the majority have some of their centres, but not all, who are participating in CWELCC.



“

Accessible Capital funding is required.

- Survey respondent

”

Are all your centres enrolled in the CWELCC program in 2024?

	Auspice of multi-site groups		
	Not-for-profit and public	For-profit	Total
All or not all centres are in CWELCC program			
all centres			
frequency	40	6	46
percent	(97.6%)	(54.5%)	(88.5%)
not all centres			
frequency	1	5	6
percent	(2.4%)	(45.5%)	(11.5%)
Total			
frequency	41	11	52
percent	(100.0%)	(100.0%)	(100.0%)

Data from Survey of Operators, 2024 by Building Blocks for Child Care (B2C2)



We need higher wages to retain staff

- Survey respondent



How many of your centres are enrolled in the CWELCC program in 2024?

	Auspice of multi-site groups		
	Not-for-profit and public	For-profit	Total
Number of centres enrolled in CWELCC program			
0			
frequency		2	2
percent		(40.0%)	(33.3%)
2			
frequency		1	1
percent		(20.0%)	(16.7%)
7			
frequency	1	1	2
percent	(100.0%)	(20.0%)	(33.3%)
17			
frequency		1	1
percent		(20.0%)	(16.7%)
Total			
frequency	1	5	6
percent	(100.0%)	(100.0%)	(100.0%)

Note:

1 - from survey of operators, 2024 by building blocks for child care (B2C2)

2 - CWELCC is the canada-wide early learning and child care program that lowers parent fees

3 - only multi-site organizations with some centres not in CWELCC were asked this question



Families should never have to choose
between working to pay their bills and staying
home with their children because they cannot
find child care.

- *Survey respondent*



Interest in expansion

Most multi-site organizations declare that they are interested in pursuing expansion (about 64%) and that is true for non-profits and for-profits alike. And most other groups are unsure about expansion, rather than opposed. Only about 12% of respondents indicated opposition.

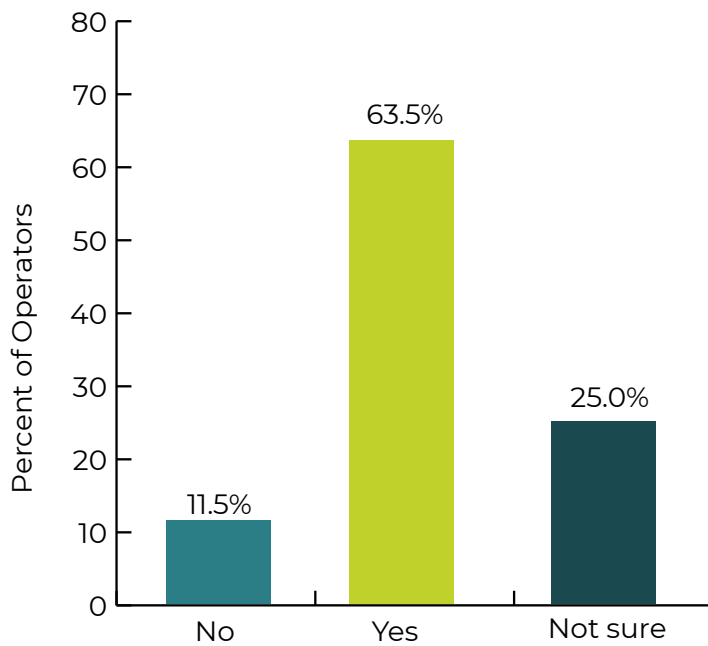
Respondents who said yes or unsure to the expansion question (46 respondents) were then asked whether their organization was likely to expand the number of spaces or set up new centres within the next five years. 36 out of 46 (or over 78%) said they were likely or very likely to expand in this period. Only 4 said no, and the rest were unsure.

Expansion interest in multi-site child care organizations, Ontario, 2024

	Auspice of multi-site groups		
	Not-for-profit and public	For-profit	Total
Is multi-site organization interested in pursuing expansion?			
yes			
frequency	25	8	33
percent	(61.0%)	(72.7%)	(63.5%)
no			
frequency	4	2	6
percent	(9.8%)	(18.2%)	(11.5%)
not sure			
frequency	12	1	13
percent	(29.3%)	(9.1%)	(25.0%)
total			
frequency	41	11	52
percent	(100.0%)	(100.0%)	(100.0%)
Total			
frequency	1	5	6
percent	(100.0%)	(100.0%)	(100.0%)

Data from Survey of Operators, 2024 by Building Blocks for Child Care (B2C2)

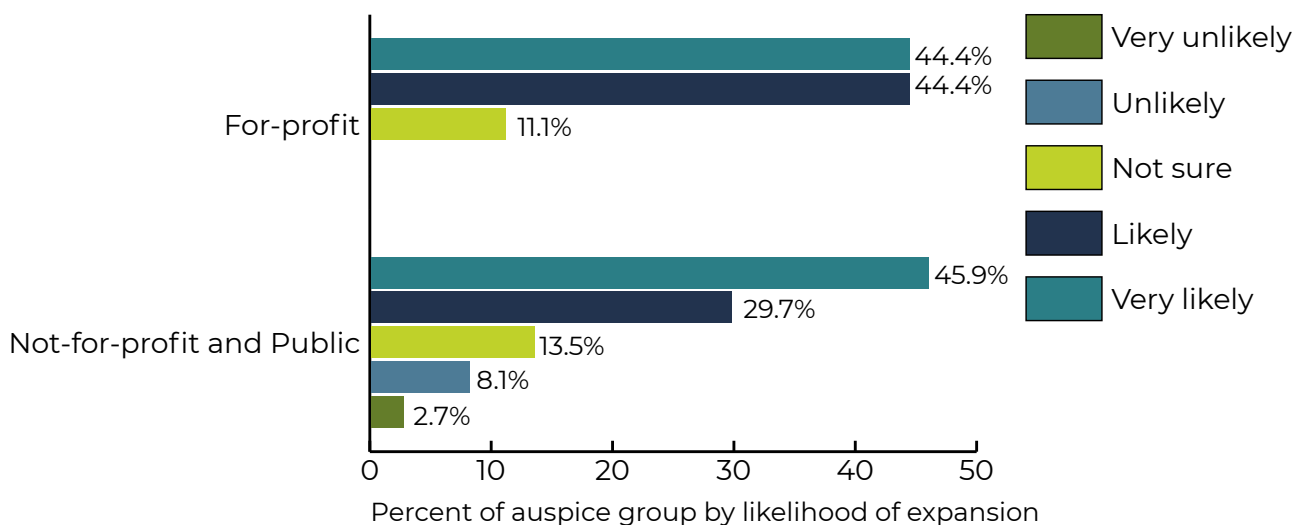
Percent of Multi-site Operators Interested in Expansion



Data from Survey of Operators, 2024 by Building Blocks for Child Care (B2C2)

Likely To Expand by Auspice

Is your organization likely to expand in the next 5 years?



Data from Survey of Operators, 2024 by Building Blocks for Child Care (B2C2)

Multi-site organization likely to expand in next 5 years, Ontario, 2024

	Auspice of multi-site groups		
	Not-for-profit and public	For-profit	Total
Multi-site organization likely to expand in next 5 years			
very likely to expand			
frequency	17	4	21
percent	(45.9%)	(44.4%)	(45.7%)
likely to expand			
frequency	11	4	15
percent	(29.7%)	(44.4%)	(32.6%)
unlikely to expand			
frequency	3		3
percent	(8.1%)		(6.5%)
very unlikely to expand			
frequency	1		1
percent	(2.7%)		(2.2%)
not sure about expansion			
frequency	5	1	6
percent	(13.5%)	(11.1%)	(13.0%)
Total			
frequency	37	9	46
percent	(100.0%)	(100.0%)	(100.0%)

Note:

1 - from survey of operators, 2024 by Building Blocks for Child Care (B2C2)

2 - this question asked of those 42 multi-site organizations who are either likely to expand or unsure

Actual and planned expansion

Of the 42 multi-site organizations who indicated likelihood of expansion in the next 5 years, or being unsure about near-term expansion, 28 have already added spaces for children 0-5 years of age since CWELCC started in Ontario in 2022. In most cases, 20 organizations, this expansion has been less than 100 spaces, with 8 organizations adding 100 spaces or more (4 non-profit and 4 for-profit).

Spaces for 0-5 added since 2022

	Auspice of multi-site groups		
	Not-for-profit and public	For-profit	Total
Spaces added since 2022			
0			
frequency	9	3	12
percent	(27.3%)	(33.3%)	(28.6%)
1-99			
frequency	18	2	20
percent	(54.5%)	(22.2%)	(47.6%)
100-199			
frequency	3	2	5
percent	(9.1%)	(22.2%)	(11.9%)
200-299			
frequency	1	1	2
percent	(3.0%)	(11.1%)	(4.8%)
1000-2000			
frequency		1	1
percent		(11.1%)	(2.4%)
no response			
frequency	2		2
percent	(6.1%)		(4.8%)
Total			
frequency	33	9	42
percent	(100.0%)	(100.0%)	(100.0%)

Note:

1 - from survey of operators, 2024 by Building Blocks for Child Care (B2C2)

2 - this question asked of those 42 multi-site organizations who are either likely to expand or unsure

When asked how big the planned expansion would be, 13 groups said between 1 and 49 spaces and another 6 multi-site organizations said between 50 and 99 spaces. 7 organizations plan expansion between 100 and 500 spaces and 2 over 500 spaces. Expansions over 500 spaces are in for-profit multi-site groups.

“

...more focus on operational funding supports for the 6-12 age group. If the goal is to get more kids into child care so that families can go back to work, there needs to be the same number of spaces available when they transition to school and need before/after-school care.

- *Survey respondent*

”

Planned expansion of multi-site child care groups in future, Ontario, 2024

	Auspice of multi-site groups		
	Not-for-profit and public	For-profit	Total
Planned expansion of multi-site organizations			
no response			
frequency	6	2	8
percent	(18.2%)	(22.2%)	(19.0%)
0			
frequency	5	1	6
percent	(15.2%)	(11.1%)	(14.3%)
1-49			
frequency	12	1	13
percent	(36.4%)	(11.1%)	(31.0%)
50-99			
frequency	5	1	6
percent	(15.2%)	(11.1%)	(14.3%)
100-199			
frequency	3	1	4
percent	(9.1%)	(11.1%)	(9.5%)
200-299			
frequency	1		1
percent	(3.0%)		(2.4%)
400-499			
frequency	1	1	2
percent	(3.0%)	(11.1%)	(4.8%)
500-2000			
frequency		2	2
percent		(22.2%)	(4.8%)
Total			
frequency	33	9	42
percent	(100.0%)	(100.0%)	(100.0%)

Note:

1 - from survey of operators, 2024 by Building Blocks for Child Care (B2C2)

2 - this question asked of multi-site operators who are likely to expand or unsure

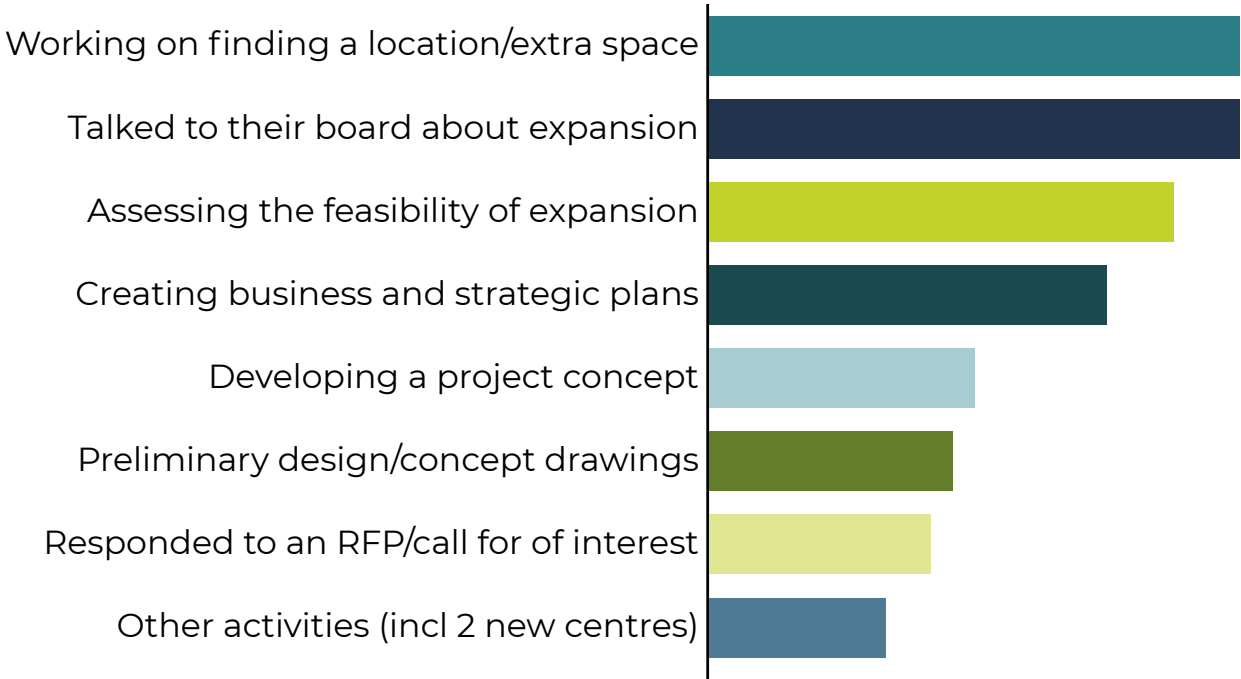
State of expansion actions

The majority of those organizations likely to expand or unsure have taken concrete actions necessary for expansion to take place. That's true of 34 out of 46 organizations or about 74%.

Organizations who are engaged in expansion were asked what specific actions towards expansion that they had taken since 2022.

- 24 said they had talked to their board about expansion
- 21 said they were assessing the feasibility of expansion
- 24 said they were working on finding a location/finding extra space
- 18 said they were creating business and strategic plans
- 12 said they had been developing a project concept
- 11 said they had worked on preliminary design/concept drawings
- 4 had issued an rfp for an architect
- 10 had responded to an rfp or call for expression of interest
- 8 had engaged in other activities related to expansion, including 2 that had opened new centres.

Actions taken to expand child care since 2022 in Ontario



Data from Survey of Operators, 2024 by Building Blocks for Child Care (B2C2)

Actions towards expansion taken by multi-site child care organizations, Ontario, 2024

	Auspice of multi-site groups		
	Not-for-profit and public	For-profit	Total
Expansion actions			
yes			
frequency	28	6	34
percent	(75.7%)	(66.7%)	(73.9%)
no			
frequency	8	3	11
percent	(21.6%)	(33.3%)	(23.9%)
not sure			
frequency	1		1
percent	(2.7%)		(2.2%)
Total			
frequency	37	9	46
percent	(100.0%)	(100.0%)	(100.0%)

Note:
 1 - from survey of operators, 2024 by Building Blocks for Child Care (B2C2)
 2 - this question asked of those 42 multi-site organizations who are either likely to expand or unsure

The next set of questions have answers that are difficult to summarize. Because these multi-site organizations can be large and may have a number of projects on the go, respondents were asked questions about up to 10 possible projects. For instance, multi-site organizations were asked the expansion methods that were or are being implemented on the different projects since 2022. The possible answers were renovation/retrofit, new build, or expand into licensable space.

Expansion methods in multi-site groups, Ontario, 2024			
	Auspice of multi-site groups		
	Not-for-profit and public	For-profit	Total
Expansion methods			
renovation/retrofit			
frequency	11	3	14
percent	23.91%	16.67%	21.88%
new build			
frequency	7	10	17
percent	15.22%	55.56%	26.56%
expand into new licensable space			
frequency	28	5	33
percent	60.87%	27.78%	51.56%
Total			
frequency	46	18	64
percent	100%	100%	100%

Note:

1 - from survey of operators, 2024 by Building Blocks for Child Care (B2C2)

2 -question asked of organizations who have taken expansion actions

It appears that there are at least 7 multi-site groupings with at least 7 projects on the go and 1 with 10 projects. There are quite a few with 1, 2 or 3 projects on the go.

This is one of a number of questions that refer to up to 10 possible projects that a multi-site group might have been engaging in since 2022. These questions are:

- What is the status of the new expansion property for each of these projects? (7)
- Do you have CWELCC operational funding already confirmed for each of these projects? (7)
- What stage is each project at (a question with 12 possible answers for each of the projects)? (7)
- When do you anticipate starting construction for each of these projects? (4)
- When do you anticipate finishing construction for each of these projects? (4)

Although the first question had one multi-site group providing information about 10 projects, the subsequent questions provided answers for fewer projects. The numbers in parentheses indicate the maximum number of projects listed in answer to each question.

Financing expansion

Nine multi-site organizations responding to the survey are seeking funding for capital expansion. Another 17 are not looking for financing (or not yet). One group indicated that it already had financing. That makes 27 respondents in total; i'm not clear why more did not answer this question. had opened new centres.

The multi-site group that has already found financing indicated that the amount was \$100,000 or less. It was a for-profit group so it's likely there was internal financing provided by the owners as well.

The multi-site group that did find financing was asked about the source. Options included

- Ministry of education start-up funding
- Loan from a bank or other financial institution
- Angel investor
- Municipality provided extra funding (in addition to start-up)
- Other

This respondent indicated "other" and that the financing came from "personal funds".

Multi-site child care organizations seeking funding for child care projects, Ontario, 2024

	Auspice of multi-site groups		
	Not-for-profit and public	For-profit	Total
Seeking capital funding			
yes			
frequency	7	2	9
percent	(31.8%)	(40.0%)	(33.3%)
no			
frequency	15	2	17
percent	(68.2%)	(40.0%)	(63.0%)
we already have financing			
frequency		1	1
percent		(20.0%)	(3.7%)
Total			
frequency	22	5	27
percent	(100.0%)	(100.0%)	(100.0%)

Data from survey of operators, 2024 by Building Blocks for Child Care (B2C2)

Amount of capital funding found by multi-site child care organizations for child care projects, Ontario, 2024

	Auspice of multi-site groups	
	For-profit	Total
How much funding have you found?		
0-100k		
frequency	1	34
percent	(100.0%)	(73.9%)
Total		
frequency	1	1
percent	(100.0%)	(100.0%)

Note:
1 - from survey of operators, 2024 by Building Blocks for Child Care (B2C2)

Source of capital funding for multi-site child care organizations, Ontario, 2024

	Auspice of multi-site groups	
	For-profit	Total
Source of capital funding		
other		
frequency	1	1
percent	(100.0%)	(100.0%)
Total		
frequency	1	1
percent	(100.0%)	(100.0%)

Note:
1 - from survey of operators, 2024 by Building Blocks for Child Care (B2C2)

Multi-site operators were asked how much money they were seeking in order to expand services. Of the 9 organizations that were seeking funding, 6 indicated they were looking for (additional) financing of \$100,000 to \$500,000. One indicated the need for \$500,000 to \$1,000,000. One more indicated the need for between \$1,000,000 and \$2,000,000, and one more indicated the need for between \$2,000,000 and \$5,000,000. Seven of the nine needing financing are non-profit multi-site organizations.

Amount of capital funding sought by multi-site organizations, Ontario, 2024

	Auspice of multi-site groups		
	Not-for-profit and public	For-profit	Total
Amount of capital funding sought			
100-500k			
frequency	5	1	6
percent	(71.4%)	(50.0%)	(66.7%)
500k-1 million			
frequency		1	1
percent		(50.0%)	(11.1%)
1-2 million			
frequency	1		1
percent	(14.3%)		(11.1%)
2-5 million			
frequency	1		1
percent	(14.3%)		(11.1%)
Total			
frequency	7	2	9
percent	(100.0%)	(100.0%)	(100.0%)

Note: from survey of operators, 2024 by Building Blocks for Child Care (B2C2)

Multi-site organizations were asked what loans – borrowed money – would be used for. One said to purchase land and a building, one said for construction costs on a new building. Eight more said that loan capital would be used for retrofit and renovation costs.

Purpose of loan capital for multi-site child care organizations, Ontario, 2024

	Auspice of multi-site groups		
	Not-for-profit and public	For-profit	Total
What will the loan fund?			
purchase of land and building			
frequency	1		1
percent	(14.3%)		(10.0%)
new building construction costs			
frequency		1	1
percent		(33.3%)	(10.0%)
retrofit or renovation costs			
frequency	6	2	8
percent	(85.7%)	(66.7%)	(80.0%)
Total			
frequency	7	3	10
percent	(100.0%)	(100.0%)	(100.0%)

Note: from survey of operators, 2024 by Building Blocks for Child Care (B2C2)

Multi-site organizations were asked about the barriers they had faced in the last 2 years that had impacted their ability to expand. A list of possible barriers was included:

- No capital funding/ no access to government or bank loans
- Lack of a funding formula that has made it too insecure to contemplate expansion
- Not enough qualified staff
- No physical space available in the community
- Worry that future governments might cancel the program
- Centre is in a school building with no capacity for expansion
- Other

Respondents were invited to check all of the possible barriers that applied to them.

At the time that this questionnaire was administered, there was no funding formula guaranteeing future revenues in Ontario, although one had been announced for the future. That did not happen until January of 2025.

Nearly 30% of multi-site organizations did not list any barriers to expansion. The remaining organizations (over 70%) identified between one and six barriers to expansion.

Number of barriers to expansion in last 2 years – multi-site child care organizations

Number of barriers to expansion in last 2 years	Number of multi-site organizations	Percent of multi-site organizations
No barriers	15	28.9
1 barrier	8	15.4
2 barriers	10	19.2
3 barriers	10	19.2
4 barriers	5	9.6
5 barriers	3	5.8
6 barriers	1	1.9
Any number of barriers	52	100.0

Note: from survey of operators, 2024 by Building Blocks for Child Care (B2C2)

“

Plus de financement, être juste pour tous les salaires. Plus de financement pour nos programmes qui ont plus de personnel à cause des enfants qui ont besoin

- Répondant au sondage

”

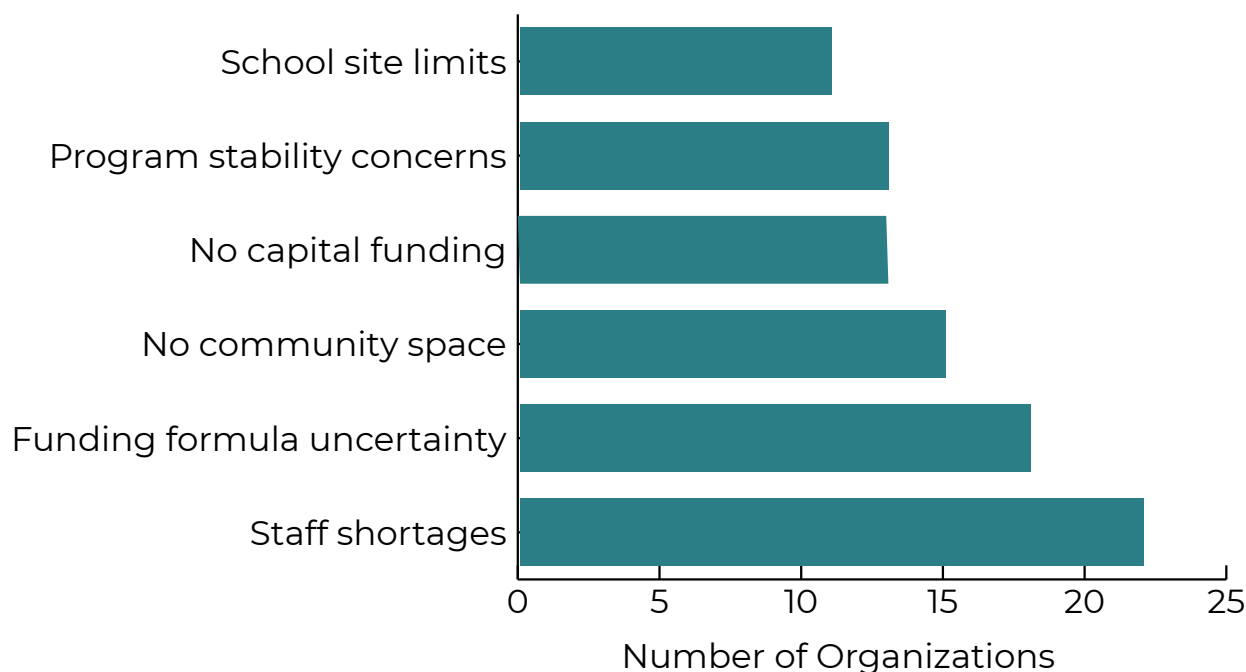
- In response to this question:
- 22 multi-site organizations indicated that “not enough qualified staff” was a barrier to expansion
- 18 multi-site organizations indicated that “lack of a funding formula that has made it too insecure to contemplate expansion” was a barrier to expansion
- 15 multi-site organizations indicated that “no physical space available in the community” was a barrier to expansion
- 13 multi-site organizations indicated that “no capital funding/ no access to government or bank loans” was a barrier to expansion in the past two years
- 13 multi-site organizations indicated that “worry that future governments might cancel the program” was a barrier to expansion
- 11 multi-site organizations indicated that “centre is in a school building with no capacity for expansion” was a barrier to expansion.

- 6 multi-site organizations indicated an “other” barrier

The “other” reasons listed were:

- Money from government is not coming
- CWLECC program should include for profit
- Can't join CWELCC, no more room
- Waiting on details of the federal infrastructure program.
- We missed the expansion of services application deadline
- Zoning and Environmental Assessments

Top Barriers to Expansion



Data from Survey of Operators, 2024 by Building Blocks for Child Care (B2C2)



Ideas:

Funding for new builds, not just expansion on old facilities.

Reduce base fee for school age children 6+

Do not limit CWELCC spaces per childcare facility, especially if they intend to expand.

Have WEG funding built into the general operating funds for all staff

Continue to support those wanting to pursue ECE with financial aid

- *Survey respondent*



Supports

Multi-site organizations were asked about the supports that are still needed to achieve expansion goals. A list of possible supports was included:

- Capital expansion grants from government
- Organizational and pre-construction support
- Government loans or loan guarantees to make it possible to borrow from banks
- Drastic increase in supply of qualified staff
- More space to be made available in schools
- Land and buildings to be made available by municipalities
- Guaranteed operating funding
- Other

Respondents were invited to check all of the possible barriers that applied to them.

Almost half the respondents indicated no supports were available. Others mentioned between one and four types of support aiding expansion.

Number of supports for expansion in last 2 years – multi-site child care organizations

Number of supports for expansion in last 2 years	Number of multi-site organizations	Percent of multi-site organizations
No supports	24	46.2
1 support	14	26.9
2 supports	7	13.5
3 supports	5	9.6
4 supports	2	3.9
Any number of supports	52	100.0

Note: from survey of operators, 2024 by Building Blocks for Child Care (B2C2)

In response to this question:

- 4 multi-site organizations indicated that “capital expansion grants from government” was a support that had recently been put in place
- 1 multi-site organization indicated that “government loans or loan guarantees” was a recent support for expansion
- 8 multi-site organizations indicated that “increase in the supply of qualified staff” was a support to expansion in the last two years
- 9 multi-site organizations indicated that “more space in schools” was a recent support to expansion
- 4 multi-site organizations indicated that “land and buildings made available by municipalities” was a support for expansion in the last two years
- 10 multi-site organizations indicated that “guaranteed operating funding” was a recent support to expansion.

- 13 multi-site organizations indicated that “support from the local municipality” was an important support for expansion in the last two years
- 1 multi-site organization indicated an “other” support, which was taking over a centre that was closing

The “other” reasons listed were:

- Money from government is not coming
- CWLECC program should include for profit
- Can't join CWELCC, no more room
- Waiting on details of the federal infrastructure program.
- We missed the expansion of services application deadline
- Zoning and Environmental Assessments



Land and buildings owned by townships and municipalities need to be held and made available for child care centres. The growing demand and growing waitlists are only getting bigger.

- *Survey respondent*



Supports still needed

Multi-site organizations were asked about the supports that are still needed to achieve expansion goals. A list of possible supports was included:

- Capital expansion grants from government
- Organizational and pre-construction support
- Government loans or loan guarantees to make it possible to borrow from banks
- Drastic increase in supply of qualified staff
- More space to be made available in schoolsLand and buildings to be made available by municipalities
- Guaranteed operating funding
- Other

Respondents were invited to check all of the possible barriers that applied to them.

About 31% of respondents indicated no need for additional supports to facilitate expansion, but many respondents need several types of support. More than 50% of respondents indicated that 3 or more of the supports listed were important for their organization to be able to expand.

Number of supports still needed for expansion – multi-site child care organizations

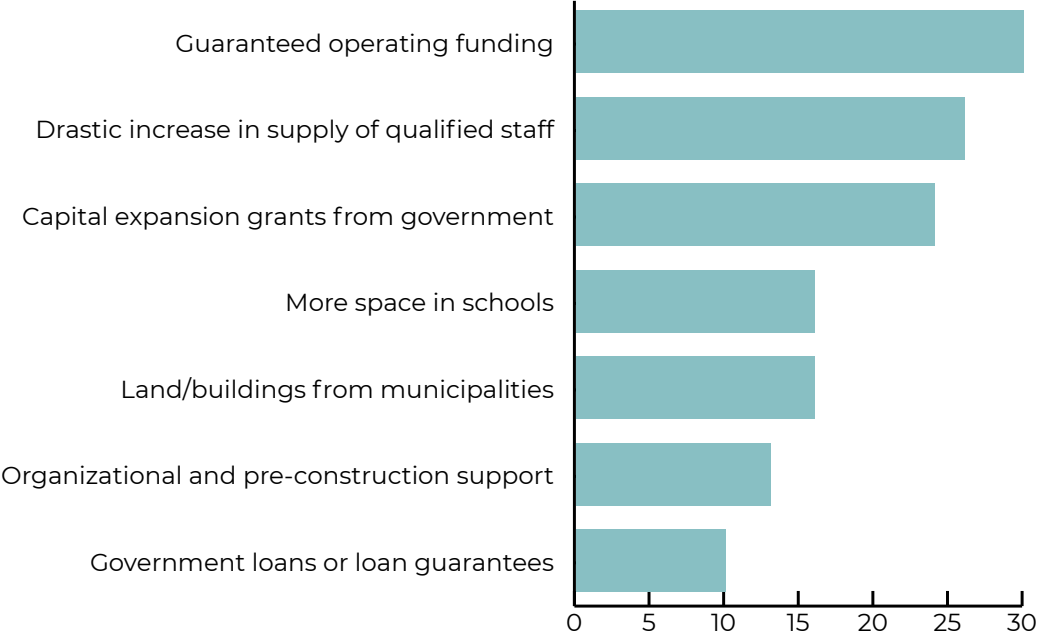
Number of supports still needed for expansion	Number of multi-site organizations	Percent of multi-site organizations
No supports	16	30.8
1 support	5	9.6
2 supports	3	5.8
3 supports	8	15.4
4 supports	8	15.4
5 supports	5	9.6
6 supports	5	9.6
7 supports	2	3.9
Any number of supports	52	100.0

Note: from survey of operators, 2024 by Building Blocks for Child Care (B2C2)

In response to this question:

- 24 multi-site organizations indicated that “capital expansion grants from government” was a support that was needed for expansion
- 13 multi-site organizations indicated that “organizational and pre-construction support” was needed to facilitate expansion
- 10 multi-site organization indicated that “government loans or loan guarantees” was a support needed to achieve expansion goals
- 26 multi-site organizations indicated that “drastic increase in the supply of qualified staff” was a needed support for expansion
- 16 multi-site organizations indicated that “more space in schools” was a support needed to facilitate expansion
- 16 multi-site organizations indicated that “land and buildings made available by municipalities” was a needed support for expansion
- 30 multi-site organizations indicated that “guaranteed operating funding” was a necessary support to facilitate expansion
- 1 multi-site organization indicated an “other” support, which was “knowledge that we can be included in CWELCC”

Supports Needed for Expansion (Multi-Site Organizations)



Data from Survey of Operators, 2024 by Building Blocks for Child Care (B2C2)

“

The first priority is funding stability; the second is simplifying the funding approach to allow for maximum efficiency for each dollar.

- *Survey respondent*

”

Financial health of multi-site child care organizations

Multi-site organizations were asked how the financial health of their organization had changed since CWELCC began in Ontario in 2022. About 19% of the non-profit respondents said their overall financial health had improved compared to about 44% of for-profit organizations. On the other hand, 25% of non-profit organizations say their overall financial health has declined, compared to 33% of for-profits. The majority of non-profits (56%) say their financial health is about the same, whereas that is only true for 22% of the for-profit organizations.

Overall financial health of multi-site child care organizations, Ontario, 2024

	Auspice of multi-site groups		
	Not-for-profit and public	For-profit	Total
Overall financial health			
improved			
frequency	6	4	10
percent	(18.2%)	(44.4%)	(23.8%)
declined			
frequency	8	3	11
percent	(24.2%)	(33.3%)	(26.2%)
stayed the same			
frequency	19	2	21
percent	(57.6%)	(22.2%)	(50.0%)
Total			
frequency	33	9	42
percent	(100.0%)	(100.0%)	(100.0%)

Note: from survey of operators, 2024 by Building Blocks for Child Care (B2C2)

Increase or decrease in qualified staff for multi-site child care organizations, Ontario, 2024

	Auspice of multi-site groups		
	Not-for-profit and public	For-profit	Total
More or fewer qualified staff			
more			
frequency	18	5	23
percent	(52.9%)	(55.6%)	(53.5%)
fewer			
frequency	8	1	9
percent	(23.5%)	(11.1%)	(20.9%)
stayed the same			
frequency	8	3	11
percent	(23.5%)	(33.3%)	(25.6%)
Total			
frequency	34	9	43
percent	(100.0%)	(100.0%)	(100.0%)

Note: from survey of operators, 2024 by Building Blocks for Child Care (B2C2)

Staff shortages that reduce capacity for multi-site child care organizations, Ontario, 2024

	Auspice of multi-site groups		
	Not-for-profit and public	For-profit	Total
Staff shortages?			
no			
frequency	16	9	25
percent	(47.1%)	(100.0%)	(58.1%)
yes			
frequency	18	0	18
percent	(52.9%)	(0%)	(41.9%)
Total			
frequency	34	9	43
percent	(100.0%)	(100.0%)	(100.0%)

Note: from survey of operators, 2024 by Building Blocks for Child Care (B2C2)

Expansion has been taking place. Most organizations, whether non-profit or for-profit indicated that they have more qualified staff than they did in 2022 – over 50% of these multi-site organizations in each case. About 24% of non-profits indicate that they have fewer qualified staff now.

Another question asked whether staff shortages had resulted in reduced capacity or had necessitated the closure of rooms. 100% of the for-profit organizations indicated that they did not have staff shortages. But, just over half of non-profits have staff shortages, while just under half do not.

More RECEs than required - multi-site child care organizations, Ontario, 2024

	Auspice of multi-site groups		
	Not-for-profit and public	For-profit	Total
More RECEs than required			
yes			
frequency	14	5	19
percent	(66.7%)	(83.3%)	(70.4%)
no			
frequency	7	1	8
percent	(33.3%)	(16.7%)	(29.6%)
Total			
frequency	21	6	27
percent	(100.0%)	(100.0%)	(100.0%)

Note: from survey of operators, 2024 by Building Blocks for Child Care (B2C2)

Directors' approvals required for multi-site child care organizations, Ontario, 2024

	Auspice of multi-site groups		
	Not-for-profit and public	For-profit	Total
Directors' approvals required			
no			
frequency	11	3	14
percent	(100.0%)	(100.0%)	(100.0%)
yes			
frequency	0	0	0
percent	(0%)	(0%)	(0%)
Total			
frequency	11	3	14
percent	(100.0%)	(100.0%)	(100.0%)

Note: from survey of operators, 2024 by Building Blocks for Child Care (B2C2)

Still on staffing, these multi-site organizations were asked whether, in any of their centres, they had more RECEs than required by regulations. A large majority of respondents (about 70%) answered yes. This was the case for 83% of for-profit organizations and 65% of non-profit multi-site organizations.

No respondents indicated a need to rely on director's approvals in order to meet the required staffing standards in their centres.

Conclusion

The survey results reveal a clear and urgent truth: Ontario's multi-site child care operators are interested in expansion and willing to expand, yet their ability to do so is constrained by persistent, systemic barriers. While the CWELCC program has lowered parent fees, increased demand, and sparked some growth since 2022, expansion remains uneven. As our survey results show, non-profit multi-site child care providers face ongoing staffing shortages and financial uncertainty. For-profit multi-site providers identified inconsistent access to CWELCC participation and funding as major barriers to their expansion as of late 2024.

The most pressing obstacles—staff recruitment and retention, secure and adequate operating funding for new services, and lack of grant or loan funding for capital investment—are not insurmountable, but they require government actions and supports, especially to facilitate non-profit expansion. Operators have demonstrated initiative, with most already taking concrete steps toward expansion, yet without adequate and guaranteed future operational funding, robust workforce strategies, and meaningful capital support, these plans risk stalling.

If Ontario is to meet the urgent demand for affordable, high-quality predominantly non-profit and public child care, governments at all levels must act now. That means:

- **Guaranteeing future operational funding** that fully covers the costs of expansion and ongoing delivery.
- **Investing in the workforce** through competitive wages, benefits, and long-term retention strategies for all early childhood educators.
- **Providing capital grants, loan guarantees, and access to municipal or school board space** to lower the barriers to building or retrofitting facilities.

Our survey results say that multi-site operators have the interest, commitment, and readiness to deliver child care spaces that families need. The question is whether the policy and funding environment will empower them, and the children and families that depend on them, to succeed.



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