



**NASHVILLE  
EARLY EDUCATION  
COALITION**



# **SUCCESSFUL FAMILIES, A STRONGER CITY**

*NEEC Impact Report 2025*



## DEAR FRIENDS AND PARTNERS,

High-quality, affordable early childhood education is critical to Nashville's success. When families can't find or afford care, parents miss work, employers lose talent, and children miss critical early learning. NEEC was created to meet this moment – serving as a catalyst and champion to align families, providers, employers, philanthropy, researchers, and policymakers around practical solutions.

Our work is focused on three priorities: **expanding child care access, elevating early educators, and driving economic growth.** In our first year, we invested in community-based centers serving income-limited families, convened leaders to share data and solutions, and turned evidence into action through citywide learning events – from the *Starting at Zero* screening to the fall book read of *The Daycare Myth*.

What we learned is clear: tuition alone cannot cover the true cost of quality care. Low wages drive turnover, classrooms sit empty, and families are left without options. Sustained, braided public and private investment, paired with common-sense policy alignment, is essential to keep seats open and to maintain quality standards.

I am deeply grateful to NEEC's Executive Committee, Community Advisory Council, provider partners, collaborators, funders, and community champions who have made this work possible. As we look ahead, NEEC will continue to lift educator and family voices, publish clear local data, and mobilize partners to remove barriers and build durable solutions.

I hope you'll join us as a Coalition Champion, an employer partner, or policy ally. Together, we can deliver strong starts for children and a stronger Nashville for all.

With appreciation,

A handwritten signature in cursive script that reads "Melanie Shinbaum".

**MELANIE SHINBAUM**

*Executive Director, Nashville Early Education Coalition*

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## FUNDING PARTNERS



## VOLUNTEER LEADERSHIP

### NEEC Executive Committee

Corinne Bergeron, *CEO, The Frist Foundation*  
 Laura Bilbrey, *Senior Director of Learning and Implementation, Teaching Strategies*

Hal Cato, *CEO, Community Foundation of Middle TN*  
 Angela Goddard, *Executive Director, Joe C. Davis Foundation*

Erica Mitchell, *CEO, United Way of Greater Nashville*  
 Viva Price, *Executive Director, Youth Encouragement Services*

### NEEC Community Advisory Council

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Anne Clem, *Grant Manager, Child Care Tennessee*

Stephanie Coleman, *CEO, Nashville Area Chamber of Commerce*

Leslie Cowell, *Dean, College of Education, Lipscomb University*

Tracey Dill, *Chief Community Impact Officer, United Way of Greater Nashville*

Debbie Ferguson, *Child Care Director, Glen Leven Presbyterian Church Day School*

Alyssa Garnett-Arno, *Executive Director, St. Mary Villa Child Development Center*

Dana Glenn, *Director of Child & Adult Care Licensing, Tennessee Department of Human Services*

Monique Hodison, *Executive Director, Schrader Lane Child Care & Learning Academy*

John Mikos, *CEO, YMCA of Middle Tennessee*

Cynthia Osborne, *Executive Director, Professor of Early Childhood, Education and Policy Prenatal-to-3 Policy Impact Center, Vanderbilt University*

Rebecca Lofty Woods, *Senior Vice President, Government Affairs, Tennesseans for Quality Early Education*

## STAFF

Melanie Shinbaum, *Executive Director*

## COLLABORATORS

Chorus

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## NASHVILLE EARLY EDUCATION COALITION

High-quality, affordable early childhood education is essential to Nashville’s families, workforce, and economic health. Yet for too many parents, finding care that is reliable, accessible, and aligned with their needs remains out of reach. Rising costs, limited supply (especially for infants and toddlers), and workforce shortages place significant strain on both families and providers. Parents face impossible tradeoffs, providers operate on razor-thin margins, and employers feel the ripple effects as early childhood education instability disrupts workforce participation and productivity.

These challenges are systemic, interconnected, and unevenly felt, disproportionately affecting families with lower incomes and providers serving communities with the fewest resources. Addressing them requires more than isolated programs or short-term fixes. It demands coordinated leadership, sustained advocacy, and strategic systems changes.

The Nashville Early Childhood Coalition (NEEC) exists to meet this moment.

NEEC serves as a catalyst and champion for affordable and high-quality early learning. We collaborate with families, early childhood education providers, employers, and policymakers to ensure that every family has access to affordable, high-quality early education, so parents can work, children can thrive, and our city grows stronger.

# NASHVILLE’S EARLY CHILDHOOD EDUCATION LANDSCAPE

The challenges in early childhood education are well-documented in data, the anecdotal experience of early childhood education providers, and stories from families trying to access quality care. Parents can’t afford to pay more, educators can’t make less, and early childhood education providers are set up to fail.

While there are more than 400 early childhood education centers in Nashville, only eleven (11) operate specifically with a mission to provide high-quality, affordable care to income-limited families. These centers have participated in a shared learning, data collection, and funding cohort conducted by NEEC, called Bridge to Sustainability.

### BRIDGE TO SUSTAINABILITY COHORT

- |   |  |
|---|--|
| 15th Avenue<br>Learning Academy North         | McNeilly Center for Children                               |
| Eighteenth Avenue<br>Family Enrichment Center | Schrader Lane Child Care &<br>Learning Academy - Vine Hill |
| Equally Created                               | St. Luke’s Community House                                 |
| Fannie Battle Day Home for Children           | St. Mary Villa<br>Child Development Center                 |
| First Steps, Inc.                             | Wayne Reed<br>Christian Childcare Center                   |
| King’s Daughters<br>Child Development Center  |  |

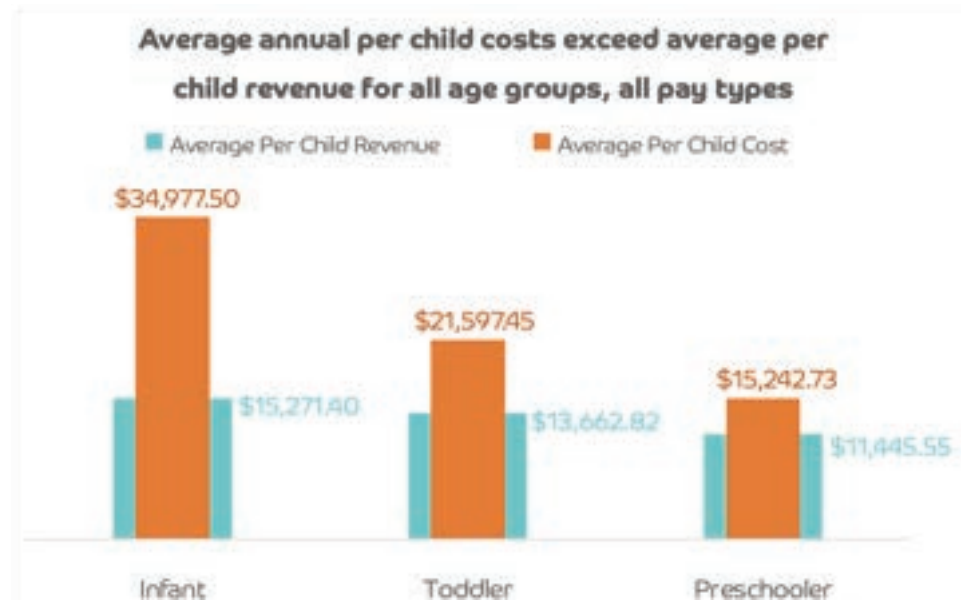
This part of the market experiences the system’s pressures first and most intensely – staffing churn, below-cost reimbursement, and persistent waitlists. By stress-testing solutions where the system is most strained, we surfaced fixes that strengthen stability and quality **across Nashville’s early childhood education market.**

## Bridge to Sustainability: Investing While Learning

**The early childhood education business model (e.g., the types and amounts of revenue sources, compared to their costs) disincentivizes centers from serving a majority of income-constrained families.**

For centers, like those in the Bridge to Sustainability cohort, whose missions are to maintain over half of their enrollment as income-limited families, this means braiding multiple revenue sources, including parent co-payments, vouchers from the Tennessee Department of Human Services, and near-constant fundraising from private philanthropy.

This funding model is a delicate balancing act. For the Bridge to Sustainability cohort, **the average cost to provide one year of care for a child (including teacher salaries, facilities management, and other critical operating costs) still significantly outpaces the average annual revenue for each child, even at market-rate tuition**, which is simply unaffordable for many parents. The chart below shows the average annual per child cost and the average annual per child revenue for each age group, based on data shared by the Bridge to Sustainability cohort from January through June of 2025.

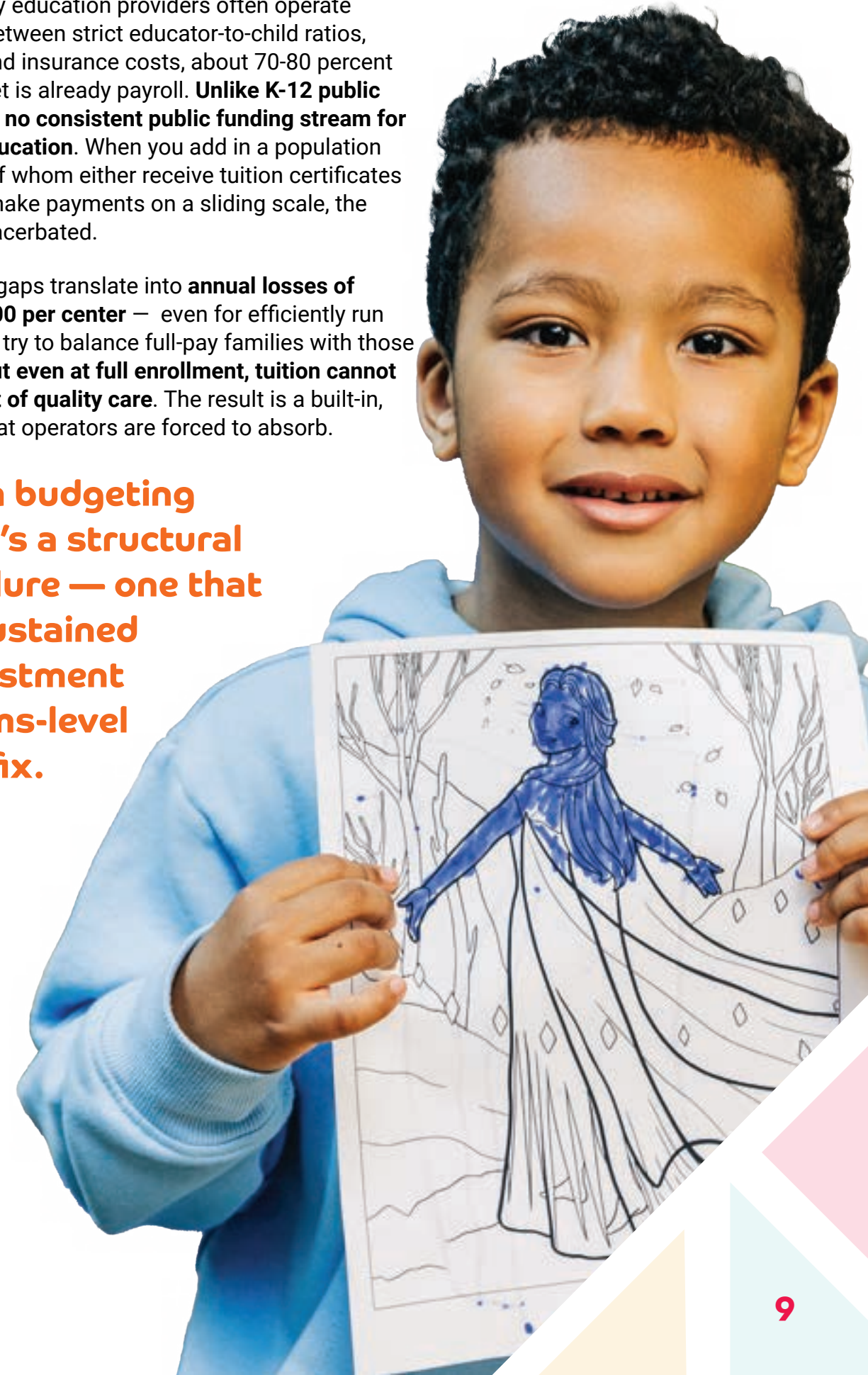


*NEEC, in partnership with United Way of Greater Nashville, analyzed data from emergency child care funding provided in 2022 by the Metro Council to better understand the challenges these centers face in maintaining functional business models. The initiative created a data source that, along with state and national numbers and subsequent data collection efforts, allowed NEEC to better understand the complexities that early childhood education centers must navigate in their efforts to provide sustainable, accessible, high-quality early childhood education.*

Even for-profit early education providers often operate on thin margins. Between strict educator-to-child ratios, rising rent, food, and insurance costs, about 70-80 percent of a center's budget is already payroll. **Unlike K-12 public education, there is no consistent public funding stream for early childhood education.** When you add in a population of families, most of whom either receive tuition certificates from the state or make payments on a sliding scale, the financial gap is exacerbated.

On average, these gaps translate into **annual losses of more than \$500,000 per center** — even for efficiently run programs. Centers try to balance full-pay families with those using subsidies, **but even at full enrollment, tuition cannot cover the true cost of quality care.** The result is a built-in, six-figure deficit that operators are forced to absorb.

**This isn't a budgeting mistake; it's a structural market failure — one that requires sustained public investment and systems-level reform to fix.**



## Families Priced Out of Market

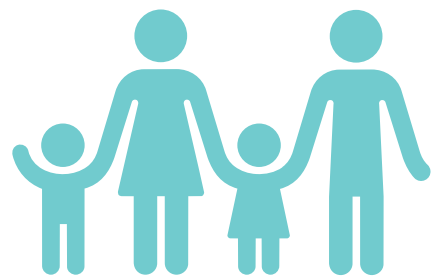
Like families across the country, Nashvillians are feeling the impact of rising costs in all major categories of expense, including housing, food, and child care. As of 2023, 41% of households in Davidson County fall below the Asset Limited, Income Constrained, Employed (ALICE) threshold, meaning that all of those households earn less than what it costs to cover basic needs in Davidson County.

The federal Administration for Children and Families (ACF) says, in general, families should be paying no more than **7% of household income** for early childhood education. For that 41% of families who fall into the ALICE category in Davidson County, 7% would be **\$367 per month** for one working adult and one child in child care, and **\$560 per month** for two working adults and two children in child care.

Yet, among the early childhood education centers participating in Bridge to Sustainability, the average monthly tuition amount ranges from **\$1,484 for infants** (which is roughly 28% of the income of an ALICE family with one working adult and one child) to **\$1,191 for preschoolers** (or 23% of the income for that same family). Even in ALICE families with two working adults and two children, these tuition costs account for 19% (for infants) and 15% (for preschoolers) of total income, more than double the threshold set by the ACF.

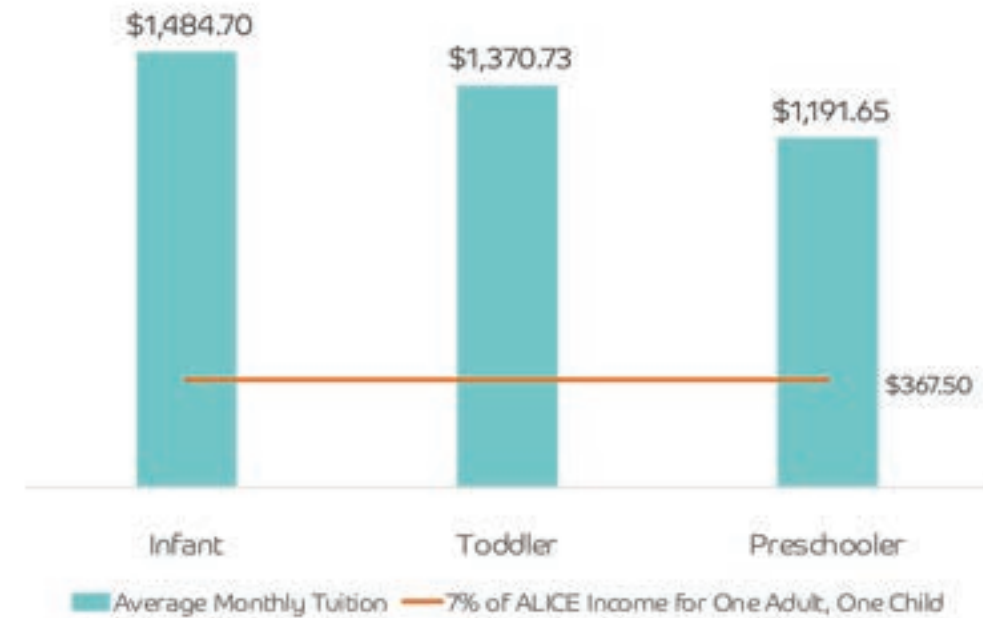


**\$1,484**  
average tuition  
(28% of monthly family income)



**\$1,191**  
average tuition  
(23% of monthly family income)

Average Monthly Tuition Rate by Age Group



While our data was from these 11 Nashville centers, we know these challenges exist for providers across the state, beyond these centers, and beyond Davidson County.



## Workforce Instability Undermines Sustainability and Quality

In addition to battling with a broken business model, centers also contend with retaining quality teachers. On average, Bridge to Sustainability participants lost approximately one teacher and gained one teacher *each month* (average of .7 hired and .7 terminations each month), requiring centers to continually hire and train new staff. This pattern disrupts culture by making it difficult to retain institutional knowledge, requires significant resources to constantly restaff, and interferes with centers' ability to keep classrooms full (which then impacts their financial stability).

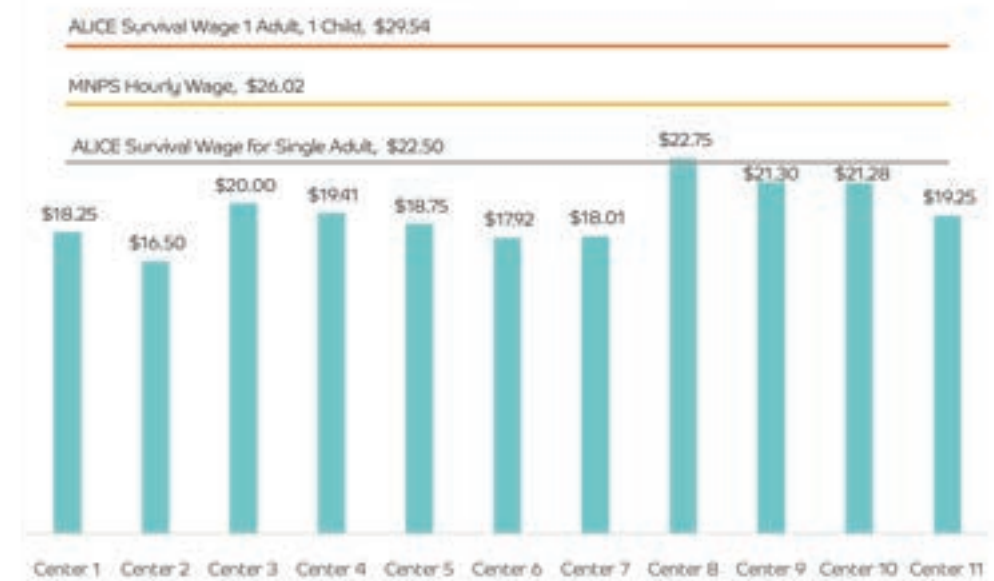


Average Number of Teachers Hired and Terminated per Center per Month



This turnover pattern is driven by a number of factors, including low wages, inconsistent benefits, and the challenging nature of the work. Average teacher wages across these centers are below the ALICE thresholds for a single adult and for one adult and one child, and are considerably below the MNPS hourly wage for preschool teachers.

Average Teacher Pay is below the ALICE threshold



Center directors report they are constantly thinking of how to improve teacher retention. Many have raised wages significantly in the past several years, and many offer benefits, including paid time off, free/reduced tuition for staff children, etc. Despite these efforts, when the average cost of care outpaces revenue, centers will face persistent financial shortfalls, making it incredibly challenging to retain high-quality teachers.

## Regulatory Barriers and Funding Cuts Intensify Pressure

Providers must navigate overlapping and often conflicting local and state regulations involving health, human services, education, fire safety, or zoning. These fragmented systems require significant time and financial investment and frequently delay center openings or expansions. As one director noted, navigating these requirements involved “nearly a full year” of uncoordinated interactions across departments.

Compounding these challenges, the Tennessee Department of Human Services announced significant early childhood funding cuts in fall 2025 due to reductions in federal block grant dollars. These cuts eliminated or reduced programs that provided professional development, operational support, and direct financial assistance to centers.

**Changes to the state child care certificate program further exacerbated affordability and access challenges, including:**

**Suspending all new certificate enrollment beginning October 1, 2025 and placing applicants on a waiting list.**

**Reducing toddler reimbursement rates by 15%, resulting in an estimated annual loss of \$250,000 across the 11 Bridge to Sustainability centers.**

**Cutting quality-based reimbursement bonuses by 50%, directly limiting centers’ ability to invest in quality and educator compensation, ultimately leading to a decrease in quality and higher wages for early educators.**

In response, many directors increased parent co-pays, reduced enrollment of subsidized families, or pursued short-term partnerships to offset losses. This landscape shifts week to week and makes long-term planning nearly impossible.

## Preschool Expansion Further Destablizes Business Model

Providing high-quality care and education to preschool children costs centers less per child, primarily because preschool classes can be larger than infant classes. As such, the financial shortfall of providing care for one preschooler is much smaller than it is for providing care for one infant. Centers, therefore, rely on keeping a higher number of preschool children enrolled to help offset the larger shortfalls in infant and toddler care.

Efforts by public child care providers, universities, and businesses often focus on providing care for preschool-age children, which NEEC anticipates will reduce the number of preschoolers enrolling in their centers. Centers will need to replace the revenue lost and rebalance their centers if average preschool enrollment decreases.





# FROM CONVENING TO ACTION

NEEC's first year focused intentionally on listening, learning, and relationship-building across a fragmented and strained early childhood ecosystem. Underfunding, workforce shortages, and regulatory complexity have impacted trust and capacity over time; NEEC prioritized rebuilding both.

Early efforts centered on convening stakeholders, elevating lived experience, and identifying shared priorities.

A cornerstone of this work is NEEC's Community Advisory Council, which brings together funders, early childhood professionals, researchers, advocates, and public-sector leaders to:

- ✓ Bring together funders, early childhood professionals, researchers, advocates, and public sector leaders
- ✓ Identify emerging trends and pressure points in the early childhood education system
- ✓ Make meaning of data and research findings
- ✓ Serve as ambassadors for early childhood education across the community

**Through consistent convening, NEEC has helped shift the ecosystem from a collection of disconnected efforts to a more coordinated, learning-oriented network. In a 2025 survey, more than 90% of partners reported that NEEC effectively engages key stakeholders and the broader community in early childhood education issues.**

## 2025 Priority Projects

While the work of building relationships and shared understanding was essential, NEEC was equally committed to taking action alongside the community through a set of Priority Projects.

### Investing While Learning

In addition to providing data to inform NEEC's work for 2026-27, the 11 centers that were members of the Bridge to Sustainability cohort received financial investments to provide stability during a period of heightened risk. Their directors also had opportunities to collaborate and learn from each other.

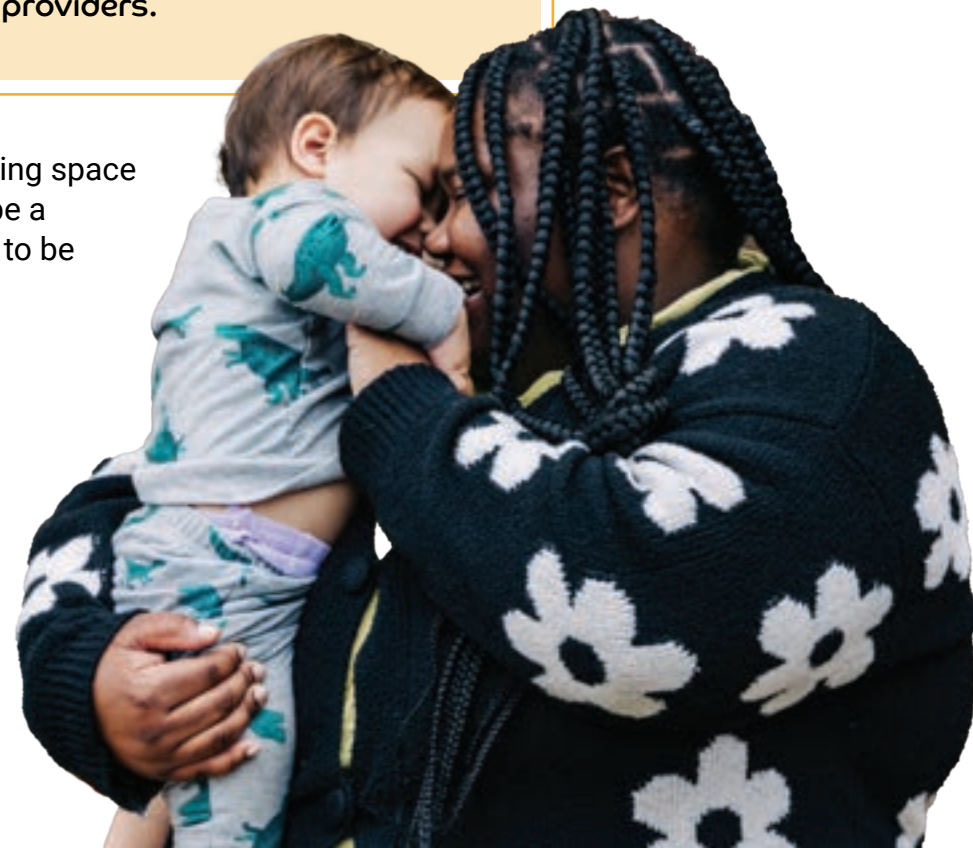
Specifically, as part of this effort:

NEEC distributed **\$1,378,448** directly to early childhood education providers to use at their centers and to support their staff.

Participating directors met regularly in a structured cohort, building relationships, sharing resources, and engaging in collective problem-solving. NEEC hosted four **Leadership Cohort sessions**, complemented by one-on-one conversations with directors to understand the complexities they face in running nonprofit early childhood education centers.

Insights from this work informed **two publicly released white papers**, grounding system-level recommendations in the lived realities of providers.

Directors consistently noted the value of having space to learn from peers, reflect on data, and shape a collective narrative about what centers need to be financially sustainable.



### Citywide Learning and Dialogue

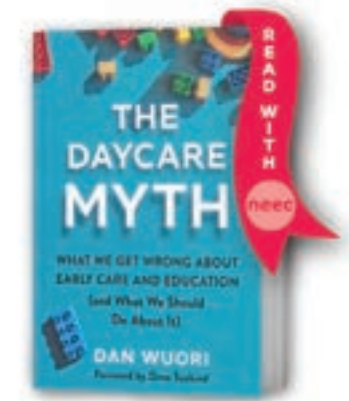
"*Strong Starts, Stronger Nashville*" was a city-wide advocacy and community engagement initiative designed to elevate public understanding of early childhood education, strengthen cross-sector relationships, and build momentum for meaningful policy change in Nashville and Tennessee.

Anchored by two complementary learning experiences—a late-summer documentary screening and panel discussion of *Starting at Zero*, followed by a fall, city-wide book read of *The Daycare Myth*—the initiative engaged families, early educators, policymakers, philanthropists, and early childhood education providers in shared learning and dialogue.

The initiative was intentionally timed to conclude ahead of the 2026 legislative session in Tennessee, ensuring that conversations, lived experiences, and data surfaced through the events could directly inform emerging policy priorities and legislative proposals.



**75** documentary screening and panel attendees



**8** book read groups **4** facilitated gatherings

**50** participants at the book read kickoff

Qualitatively, educators reported increased confidence in sharing their experiences with policymakers, community partners formed new cross-sector relationships to support ongoing advocacy, and policymakers gained a deeper understanding of early childhood education affordability, workforce challenges, and system gaps.



### Showing Up as a Partner

NEEC also intentionally amplified the work of others. Over the past year, NEEC participated in and contributed to well over **100 community events, publications, convenings, and private meetings**—from policy discussions and research collaborations to funder briefings and workforce conversations. This consistent presence has helped establish NEEC as a trusted partner and connective leader, capable of translating across sectors and aligning efforts in a crowded landscape. NEEC also regularly fielded calls from members of the media, establishing the organization as a leader in shaping news coverage and providing comments on news stories.

### Investing in Workforce Solutions

With NEEC's support, Lipscomb University is piloting an early childhood teacher apprenticeship and professional development program designed to strengthen the early childhood workforce while stabilizing early childhood education centers. NEEC supported the first year of the program, enabling rapid launch and learning, and as of August 2025, 30 teaching apprentices had been placed in early childhood education centers. This pilot offers a promising model, supporting educators as they advance their training while providing centers with reliable staffing and improved retention.

# WHAT HAS CHANGED: NEEC'S IMPACT

Across its activities this year, NEEC functioned as both a connector and a catalyst, in order to create a measurable, systems-level impact. Through NEEC's efforts, the system has seen the following positive changes (as reported by NEEC partners):



**Early childhood education leaders are more organized, more informed, and are acting together.** Through the Bridge to Sustainability Leadership Cohort, and other NEEC sponsored events, directors revisited their business models, shared real-time data, and supported one another in strengthening financial sustainability. As a direct result, centers are identifying ways to increase teacher pay, optimize enrollment, and make more informed decisions about revenue and cost.



**Funders are more aligned, more engaged, and investing more strategically.** Through panels, convenings, and advocacy efforts, NEEC has become a hub connecting funders and early childhood professionals. Local funders increasingly look to NEEC for guidance, resulting in investments that are more responsive to provider priorities and more effective in addressing affordability, quality, and sustainability.



**Data is driving action.** By collaborating with research partners and publishing widely cited white papers with United Way and Vanderbilt University's Prenatal-to-3 Policy Impact Center, NEEC reduced duplication, strengthened shared understanding, and elevated early childhood across media, policy, and funding conversations. Aggregated data on compensation, enrollment, and financial health have already prompted tangible changes in center practices and are informing system-level decision-making.



**Policy and regulatory decisions are being shaped by on-the-ground expertise.** City and state leaders are turning to NEEC as a trusted source of data and insight. NEEC's advocacy, including efforts to align state and local fire and building codes, has brought regulators and providers to the same table, ensuring decisions are informed by the realities of operating early childhood education centers and shifting power toward those closest to the work.



**NEEC's model is shaping what comes next—locally and beyond.** Local professionals, peer cities, and national leaders are seeking out NEEC's approach, amplifying Nashville's work and opening the door to greater influence, partnerships, and investment.

# LOOKING AHEAD: 2026-2027 PRIORITIES

NEEC's first year has been about building trust, surfacing shared priorities, and demonstrating that collaboration across providers, funders, policymakers, business leaders, and advocates is not only possible, but powerful. The next phase of NEEC's work is about turning that foundation into durable, measurable change.

Over the coming two years, NEEC will continue to focus on two interconnected areas: **impact and infrastructure**. Strengthening **infrastructure** is essential to ensure sustainability, effective operations, and meaningful engagement across a growing coalition. At the same time, NEEC's **impact work** will sharpen its focus, prioritizing a small number of high-leverage, time-bound initiatives designed to test, scale, and align solutions across the early childhood system.

As a coalition, NEEC's role is not to replace the work of providers or partners, but to catalyze the system: connecting efforts, translating data into action, elevating lived experience, and accelerating progress that no single organization could achieve alone.

## Priority Projects: A Closer Look at What's Ahead

NEEC's priority projects for 2026–2027 are intentionally designed to operate at the intersection of **provider sustainability, workforce stability, and policy change**. Each project is grounded in local data, informed by lived experience, and built in partnership with organizations positioned to implement and sustain solutions.



## #1 Optimize the ECE Business Model

A financially fragile provider landscape undermines access, quality, and workforce stability. NEEC will focus on strengthening the underlying business model of nonprofit, full-time early childhood education providers through a coordinated set of strategies.

**Shared Waitlist Pilot**

**Facility and Capital Improvement Funds**

**Organizational and Leadership Development**

**Expected Outcome** Providers are more financially sustainable and better positioned for long-term viability through stronger operations, improved facilities, and increased leadership capacity, resulting in more stable programs and more available seats for families.





## #2 Launch the Child Care Workforce Scholarship Pilot

In 2026, NEEC will launch the Child Care Workforce Scholarship Pilot to address two challenges—helping educators afford reliable, high-quality care for their families while enabling centers to offer a meaningful benefit that supports recruitment, retention, and long-term workforce stability. By improving access to reliable, quality care, the program strengthens workforce stability while reinforcing continuity of care for children.

**Expected Outcome** Increased recruitment and retention of early childhood educators by reducing one of the most significant cost barriers to entering and remaining in the profession.



## #3 Advance a Policy Blueprint and Advocacy Agenda

Data and pilots only create impact when they translate into policy change. NEEC will advance a coordinated advocacy approach by aligning with state and federal policy partners, leading local advocacy efforts, and mobilizing the Nashville community to elevate what is working, surface what is not, and translate local learning into action at every level.

**Expected Outcome** Local data and lived experience are translated into coordinated policy action, driving increased investment, regulatory alignment, and long-term systems change.



## Building on NEEC's Core Role

Running alongside each priority project is NEEC's central role as a **systems catalyst**—a function that is both intentional and essential in a fragmented early childhood landscape. Nashville's child care system includes four distinct but deeply interconnected groups: **education, business, government, and philanthropy**. Each group holds a piece of the solution, yet too often operates in isolation with limited shared understanding, misaligned incentives, and uneven power dynamics.

In practice, NEEC will continue to:

**Increase connections** across providers, funders, policymakers, researchers, and business leaders

**Build relationships** that enable trust, alignment, and collective problem-solving

**Empower professionals** by centering the expertise of educators and directors in decision-making

**Elevate the voices of families** navigating child care access and affordability

**Champion partner efforts**, ensuring effective work is amplified rather than duplicated

**Resource innovation**, helping test and scale promising ideas that strengthen the system

**Looking ahead, NEEC's charge is clear:** strengthen the system, not just the parts. By pairing targeted projects with catalytic coalition leadership, NEEC is positioning Nashville to make meaningful, lasting progress toward an early childhood system that works for children, families, educators, and the community as a whole.



## CALL TO ACTION: INVESTING IN A STRONG START

Nashville's early childhood system is doing just what it was designed to do, which is exactly the problem. Families can't pay more. Providers can't charge less. Classrooms sit half-empty for lack of teachers, even as parents wait for a seat.

The data NEEC collected in its first year makes it plain: this is a market failure, not a management failure. And fixing it will take all of us — business, philanthropy, government, providers, and families — moving in the same direction.

If we act now, more parents stay in the workforce, more educators stay in the field, and more children get the strong start they deserve. That's not just good for families — it's how our city grows stronger.

**LEARN MORE ABOUT  
HOW YOU CAN HELP BY  
VISITING OUR WEBSITE**



**Let's make the math work—for children, for families, and for Nashville.** Because after all, successful families lead to a stronger city.

**NEEC's priority work will be implemented in partnership with organizations that bring deep expertise, credibility, and reach, including:**

Community Foundation of Middle Tennessee

EdTrustTN

Nashville Area Chamber of Commerce

Nashville Association for the Education of Young Children (NAAEYC)

Save the Children Action Network (SCAN)

Tennesseans for Quality Early Education (TQEE)

Think Tennessee

United Way Raising Readers Nashville

Vanderbilt University Prenatal-to-3 Policy Impact Center



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## CONTACT

Melanie Shinbaum, Executive Director  
melanie@nasheec.org