



Child Care Deserts: Developing Solutions to Child Care Supply and Demand



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Dionne Dobbins, PhD
Jessica Tercha
Michelle McCready, MPP
Anita Liu

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Introduction

The Changing Landscape of Child Care

Over the past few decades, the needs of families living in the United States have changed dramatically. Painting a picture of the modern family's child care needs would require a very large canvas. From changes in the economy to shifting family structures, numerous factors have impacted children's increasingly diverse needs. Decades ago, child care was an experience for few families, but over the years, seeking child care from sources outside the family has become the norm. In the mid 1990s, changes in family structure—such as the increased prevalence of single parenting coupled with welfare reform and an economic boom—brought more parents into the workforce.¹ In addition, there are myriad factors, such as the expeditious return of new mothers to work after the birth of a child that continue to contribute to the ever-changing landscape of child care.² Consequently, it is important for the child care system to adapt to adequately support the evolving needs of the American family.

As the need for child care grows and diversifies with these changes, parents all too often face a lack of options for quality child care that meets their needs. Child Care Aware® of America (CCAoA) is committed to the mission of advancing a child care system that effectively serves all children and families. In working toward our vision, where every family has access to high-quality, affordable child care, it is important to evaluate the issues facing all families, especially those who are not adequately supported by the current system.

Report Overview

This white paper explores the concepts of child care supply and demand from both the perspectives of 1) parental choices and decisions made related to finding quality child care, and 2) state- and community-level approaches to documenting and addressing child care deserts. First, we highlight the themes around parent child care journeys that emerged from a series of focus groups with parents from vulnerable populations. Next, we provide an overview of several key informant interviews conducted with selected state- and community-level studies

of child care deserts. For each community, we document motivations for studying deserts, the process they undertook to collect data, the reports and/or online tools they developed, how data was used to influence policy or community change, and where readers can go for more information. The report gleans lessons learned from these efforts. We also included several snapshots of supply and demand work of other states and communities throughout this paper. Finally, we propose policy solutions to improve access to quality child care for vulnerable populations.

Child Care Deserts

What is a Child Care Desert? The U.S. Department of Agriculture defines food deserts as “parts of the country void of fresh fruit, vegetables, and other healthful whole foods.” **CCAoA borrows from this important work and refers to areas or communities with limited or no access to quality child care as *child care deserts*.** In both situations, the identification of deserts is important, because it identifies an absence of an essential commodity that results in limited access, which current child care systems do not address.

At this early stage in our exploration of child care deserts, we are interested in introducing the concept very broadly—focusing on the ways in which communities examine supply and demand concerns. As we learn more from the field, we hope to provide a more specific definition of the term child care desert. With respect to quality, we recognize that there are many ways in which the field defines levels of quality through classroom observations, accreditations and quality rating systems. Although this is assessed on a state-by-state basis, standard key indicators of a quality child care program include but are not limited to:

- **Ratios.** The number of children cared for and educated by one adult. Having one adult responsible for a smaller number of children allows children to get more individualized attention, but low staff-to-child ratios requires hiring more staff.
- **Group size.** The number of children that can be in one setting regardless of adult supervision. A smaller group size is better for children’s development, particularly for very young children where recommended group sizes are six infants with two adults.

- **Facilities.** Creating warm, welcoming learning environments and engaging outdoor play spaces with adequate square footage per child is essential for children’s learning. Child-focused learning environments offer the child choices and opportunities for learning through play.
- **Activities and materials.** A wide variety of activities and age-appropriate materials accessible to children and that support children’s academic, physical, social, and emotional growth and school readiness.
- **Professional development and training.** Well-trained staff is an important component of child care quality.
- **Warm, positive interactions** between teachers and children. Quality programs have teachers and providers who use positive speech and are loving and responsive.

In our review of a number of states that have explored supply and demand in child care, we found that these deserts are especially prevalent in low-income communities, rural communities, among families of color, and among families with irregular or nontraditional work schedules. Now with the passage of the Child Care and Development Block Grant Act of 2014, it is paramount that states and communities understand how to study child care supply and demand, analyze the findings, identify areas of child care deserts, and implement solutions. In fact, Child Care Resource and Referral Agencies (CCR&R) are specifically called out in the legislation to report supply and demand to the state:

If a state uses funds for a system of local or regional CCR&R, the CCR&R must collect data and provide information on the supply and demand for child care and submit this information to the state.

States are also expected to meet the needs of certain populations by developing and implementing strategies to increase the supply and improve the quality of child care services for children in underserved areas, infants and toddlers, children with disabilities (as defined by the state), and children who receive care during nontraditional hours (NTH). To serve these vulnerable populations and ensure that children from these families gain access to high-quality early childhood education, states and communities need data on supply and demand of child care services.



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She's really excited, and she tells me that she's had a good day and that she learned a lot. And that means she's happy and she's very excited, and this makes me very happy. So for me this is something that's very important.

— Latino Parent, April 2016 Focus Groups

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the unique factors that affect supply and demand is required to devise solutions that better address the needs of families.³

Demand and Supply of High-Quality Child Care

The demand for high quality child care has grown significantly in previous decades, and a child care system that is adaptable and responsive to a variety of needs is required. Research has shown that high-quality child care is especially important for historically vulnerable and underserved populations,⁴ and it is important to consider how the demand for child care in these populations varies across communities challenged by child care deserts. Ensuring that all children have access to high-quality and affordable early childhood programs can help children prepare for school and succeed later in life and is a workforce support in every community. However, the supply of such child care is often limited, especially for underserved populations. In order to gain a full picture of child care deserts, it is also critical to consider some of the contextual factors contributing to the increasing demand for child care and areas in which the supply of child care is lacking.

Women as breadwinners. The demand for quality, accessible child care in recent years has been greatly affected by shifting family and workforce demographics. In 1970, only 30 percent of married mothers with a child under the age of six were in the workforce; by 1994, that figure had doubled to 62 percent.⁵ Now, about 75 percent of mothers with children six to 17 years old are in the labor force; the figure stands at 61 percent for mothers with children under three years old.⁶ This rise in maternal employment has affected the demand for child care, as families with employed mothers are more likely than families with non-employed mothers to seek quality, affordable child care. To compound this issue, in 2013, 40 percent of all households with children under the age of 18 include mothers who

The new law also significantly increases the minimum health and safety requirements for providers accessing child care subsidies. While provisions in the new law are critical, without support it may be difficult for some providers to meet these standards, resulting in a decrease in the supply of quality providers serving low-income CCDF eligible children. In addition, the passage of more stringent health and safety requirements may prove a strain to school-age programs which previously had few and limited requirements to meet. If these programs do not receive support to meet these requirements, parents may begin to experience child care deserts specific to the school-age population.

At the local and state levels, child care leaders (especially CCR&R) have traditionally examined child care access, conducted needs assessments, and mapped supply and demand for target populations. It is imperative that expertise and data available through entities like CCR&R are included and leveraged in a systematic collection of supply and demand. Communities need to understand how the data from these evaluations will aid states in developing strategies to increase accessibility to vulnerable populations.

To gain an accurate picture of these child care deserts, where supply of child care does not meet families' demand, it is important to more closely examine definitions of both supply of and demand for child care. As you will see later in this report, each community we interviewed approached the concept of supply and demand in a slightly different way. The concepts of supply and demand in child care are extremely nuanced—beyond the traditional definitions that revolve around number of provider slots and counts of children—and an understanding of

are either the sole or primary source of income for the family. However, this group is further divided: 5.1 million (37 percent) of these breadwinner moms are married mothers who have a higher income than their husbands, and 8.6 million (63 percent) are single mothers. Married breadwinner moms are disproportionately white with a household median annual income around \$80,000, while single breadwinners are largely African American or Hispanic with a median income around \$23,000.⁸

Addressing Infant Child Care. For many families, the high cost of infant and toddler care in and of itself limits access to an already limited supply of child care options. According to the 2016-2017 CCAoA *Public Policy Agenda*, the average cost of infant care exceeds 10 percent of the state's median income for a two-parent family. Nearly 64 percent of infants and toddlers participating in CCDBG live in families with household incomes below the federal poverty level, which was \$20,090 for a family of three in 2015. Young children need developmentally appropriate care with higher staff-to-child ratios and smaller group sizes than those for older children, which is a key factor to markedly higher costs for infant care. Infants and toddlers from low-income families are more likely than their peers to lack the key resources needed for a good start on the school readiness path and to ensure they not fall behind even before arriving at pre-kindergarten. These costs are even harder to shoulder for low-income families and single parents. Across all 50 states, the cost of center-based infant care averaged over 40 percent of the state median income for single mothers.

Unequal access for minority children. This stratification in the dramatically increasing group of working mothers may help to explain why child care demand appears to be especially diversified along racial and income lines. For example, among children ages birth through four whose mothers are employed, African-American children are most likely to be enrolled in center-based care (31 percent). Regardless of race, poor children are also less likely to be in center-based care and more likely to be cared for by a relative at home⁹—likely in order to keep the costs of child care down in an already strapped budget. As such, increasing levels of maternal employment have grown a demand for child care to become a pressing issue for many families.



The nation's census data reveals the pressing need for a remedy to the unequal access to quality child care for children of color. According to census data released in 2015, there are approximately 5.5 million¹⁰ children of color ages five years or younger living the U.S. By the year 2050, it is predicted that people of color will be the largest percentage of all U.S. citizens. Furthermore, it is projected that by 2060, Hispanics will represent 39 percent of the U.S. population under the age of five with whites, African Americans, and Asians at 31 percent, 13 percent, and 7 percent respectively.¹¹ Not only is the general supply of child care options lagging, but the options currently available may not fully represent quality child care responsive to the specific cultural and linguistic needs of this growing population.

In many communities, particularly more rural areas, access to care may be limited to home-based providers, further limiting choice for families. Although the selection of center-based care versus family-based care is not necessarily an indicator of quality, it may be an indicator of access to care deemed more culturally appropriate by parents. As noted in *Theories of Decision-Making* later in this report, parents are more likely to choose child care situations that provide their child with a social experience most closely identifiable to their own, leading many to choose relatives or neighborhood family-based care providers.

Unfortunately, all early care and education programs are not equal. Studies show that some children of color, particularly African-American preschoolers, are the least likely to gain access to high-quality early care and education. Barnett et al.¹² reported on the findings from the National Center for Education Statistics study of observational ratings of preschool

settings and revealed that although 40 percent of Hispanic and 36 percent of white children were enrolled in center-based classrooms where quality was rated as “high,” only 25 percent of African-American children were in classrooms with the same rating. Furthermore, 15 percent of African-American children attended child care centers where quality was ranked as “low”—almost two times the percentage of Hispanic and white children. Hispanic and African-American children in home-based settings were even worse off with over 50 percent in settings rated as “low” compared to only 30 percent for white children.

Head Start, designed to serve the children of very poor families, is focused on delivering quality programming with high program standards and frequent federal monitoring. Quality, however, is inconsistent from program to program, leaving African-American children at a real disadvantage. In fact, only 26 percent of the Head Start programs that serve African-American children are considered high quality—far below the numbers for both Hispanic and white children (43 percent and 48 percent, respectively).¹³

Desire for culturally and linguistically appropriate child care. The importance of cultural and linguistic diversity in demand for child care has also grown, as the U.S. becomes more diverse. Currently, out of 23 million children under the age of six, 25 percent (as compared to just 14 percent in 1990) is made up of children of immigrants and refugees.¹⁴ Children benefit from working with teachers and caregivers from similar linguistic, racial, or ethnic backgrounds.¹⁵ In addition, children benefit from exposure to educators and caregivers from diverse backgrounds at an early age as they develop early perceptions of social categories. Although the early childhood education workforce is more diverse than most fields, it is critical to maintain and grow this diversity. Further, while reflecting

In the culture we live in, you have to make sure that your children have a way of living with other races [...] the other day she was telling me that she wanted to have blonde hair. So all those images that she's seeing on television, that's affecting how she thinks of herself, and so I want to make sure to show her that there are different kinds of people, that they're all beautiful.

— Latino Parent, April 2016 Focus Groups

diversity is important, it is not enough to simply have an ethnic match between staff and children. All child care providers, regardless of background, should have professional development opportunities that focus on how to best support learning and development of children from diverse backgrounds.

Mondays she goes to daycare until my grandparents pick her up, and then they stay at my house until my aunt gets home. She's with me Tuesday. I take her to my mom's Wednesday and Thursday, because those are my mom's two days off. Friday I take her back to daycare. Saturdays she's all day with my aunt, and Sunday she's all day with my dad. It definitely takes a village.

— Parent With Nontraditional Work Schedule, April 2016 Focus Groups

Nontraditional hours (NTH) for child care. Beyond the growth of cultural and linguistic diversity, there is also growing demand for child care that is flexible in scheduling to meet the needs of parents in the NTH workforce. Over one-fifth of parents with children under age 13 work nontraditional schedules. Irregular, unpredictable schedules often also require last-minute adjustments to child care arrangements, necessitating extremely flexible child care hours to ensure comprehensive care.¹⁸ This need for flexibility is also especially impactful for low-income workers, who are more likely to operate on nontraditional schedules than other workers (28 percent compared with 20 percent, respectively).¹⁹ Most child care centers are often open only Monday through Friday during regular business hours and are thus unable to support families who require child care during their own working hours. In addition, low-income parents working irregular schedules may be discouraged from seeking child care subsidies because such subsidies may require a minimum or consistent number of work hours per week, further limiting realistic choices to meet their needs.^{20, 21}

Child care supporting special needs. Another population impacted by increasing demand for flexible child care is families with children with special needs. As many as one in four children are at risk for a developmental delay or disability.²² Low-income children are also more likely to have special needs, with sixteen percent of low-income families having a child with a disability (nearly 50 percent higher than the rate for higher income families). Research has shown the importance of providing supports to

children with disabilities and other special needs in their early years, as quality child care and early education in inclusive settings can benefit both the children and their families. Despite this statistic, the current state of child care centers leaves many families with special needs wanting for adequate support. Studies have shown the lack of child care slots willing to accept children with disabilities or other special needs, and even once accepted, parents have reported that their children are more likely to be let go by caregivers due to behavioral problems.²³

Parent Perceptions of Child Care Deserts

Theories of Decision-Making

When it comes to plotting child care choice, researchers have come a long way since their initial comparison of supply versus demand. It is important for the child care community to understand the challenges parents face in choices around child care so that they can better support decision-making that makes sense for parents' unique situations. Interesting work by the [BIAS project](#) focuses on how parents make decisions that impact economic self-sufficiency, including child care. Part of their work focuses on the importance of understanding and reducing the psychological barriers parents may have in making choices about services (too many choices, not enough time to make a choice, and confusion with how the choices are presented) and how policymakers can make the process more streamlined and easier for parents to navigate.

Economic Model. Classically, researchers turn to the economic or consumer choice model, which assumes individuals make decisions by considering tradeoffs relative to their preferences and the options available; although choices are subject to constraints, such as budget and supply, individuals will choose the best option. The consumer choice theory assumes individuals have full information, about their choices, however parents frequently make decisions about child care with very incomplete or imperfect information about the options available. This theory does a good job of describing how price affects choice, but does not adequately predict how factors like race and ethnicity, and parent perception of child care quality impact decision-making.²⁴

Heuristic Model. When individuals make decisions, they frequently rely on past experiences to shortcut



the decision-making process. These simplifying shortcuts, or *heuristics*, help us understand the factors that interfere with a careful, reasoned decision. These shortcuts are most effective when we can draw from familiar situations. When decisions are based on a new situation, the shortcuts lead individuals to make unfair assumptions about their options. For example, a parent may be more likely to choose a child care option they drive past daily, or one that many of their friends or neighbors use instead of another better option.²⁵

Social Network Model. Parents also rely on personal networks and relationships to help make decisions. The social networking framework recognizes that not all relationships have equal value or exert the same pressure from individual to individual, or even from decision to decision.²⁶ For example, a parent might seek advice on how to find child care from a well-respected elder and a casual neighbor. The social network model assumes the parent would attach greater value to the advice of the well-respected elder.

Accommodation Model. The accommodation theory suggests that when parents make decisions about child care, they are not making true choices; instead they make accommodations based on factors in their lives that may include job demands, short supply of child care slots or options, individual child and family characteristics, demands of the child care system, and demands of their social network.²⁷

Accommodation theory “ . . . recognizes that complex choices are rarely based on perfect information about preferences.”²⁸ Child care decisions are highly contextualized patterns of action, based on

Developing Solutions to Supply and Demand: Philadelphia, Pennsylvania

Funded by the recently passed and unprecedented soda tax, Philadelphia is planning a citywide expansion of early childhood education. As they expand, they are utilizing supply and demand data by neighborhood to determine the availability of pre-K slots for three- and four-year olds, as well as the percentage of children with “multiple risks”, which include preterm or low birth weight and lead exposure among other risk factors, who may be in need of quality child care. The city will prioritize diverse, independent, and quality pre-K providers as they disburse funds to bridge the gap in child care provision across Philadelphia. To aid this expansion effort, Fund for Quality developed an interactive mapping tool for parents, providers, and policy makers.

a dynamic interplay of available options hampered by numerous budgetary, scheduling, and social constraints. Child care preferences are not “discrete and static,” but are ever-changing as supply increases or decreases and preferences adapt.²⁹ These decisions may be further complicated when parents are faced with special concerns such as a child’s special needs, being a dual language learner, or through scheduling conflicts of a job with nontraditional hours.

Special needs. In a study on child care choice and satisfaction, Knoche et al. found that mothers of children with special needs tend to have a more erratic work schedule and often report some workplace discrimination. Children with special needs experience several different types of child care, with different caregivers, and beginning at a later age than other children, demonstrating a general lack of availability of providers or care settings. This may also indicate a lack of availability for appropriate infant and toddler care as well. Parents rated the provider’s willingness to accept their child, the provider’s willingness to accept subsidies, training and credentials, and accreditation as the most important factors related to their satisfaction with their child care setting.³⁰

Dual language learner (DLL). Research shows that low-income, minority, and immigrant families are more likely to use relatives as caregivers. Although this is often attributed to cultural norms and differences in childrearing beliefs, studies suggest this may be due, in part, to the availability and affordability of child care options;³¹ when options are available and affordable, Latino and DLL families choose center-based care at the same rates as other families.³² When it comes to selecting child care, it was most important to

DLL families that their child care provider speak Spanish, serving two needs: parents can easily communicate with their child’s care provider; and children are provided with a social experience similar to what they experience at home and with relatives. DLL parents believe their child will learn English anywhere, but will only maintain their native language skills when cared for by someone who speaks their native language.³³

Nontraditional hours (NTH). Although the plight of NTH workers navigating their child care journey is becoming a growing concern, there is little research done regarding their decision-making process for selecting child care. As many centers do not currently accommodate weekend or overnight care, NTH parents are left with little choice but to patch together child care between centers, family members, and friends.

Field Research

In April 2016, CCAoA conducted focus groups with parents to gain a better understanding of how they found solutions to finding child care when:

- Seeking child care for a child with special needs under the age of five;
- Seeking child care for a child under the age of five during NTH; and
- Seeking child care for a child under the age of five when the parents primarily speak Spanish.

We worked with a research firm in the Northern Virginia region to help us recruit parents and facilitate the focus group sessions. Each group had 8 respondents; it is important to note that the information gleaned from the parents cannot be generalized.

Developing Solutions to Supply and Demand: Delaware

Delaware Technical & Community College (DTCC) allows Early Childhood Education students to complete their service learning requirement at the Guard and Reserve drill weekend child care facility. This is particularly helpful for family child care providers who find it difficult to get substitutes during their business hours so they can complete service learning for this course. This simultaneously provides a vital service to military families so they can fulfill their military service requirements on drill weekends, when typical child care service providers are not open.

In addition, the state awards Capacity Grants that provide incentives for child care programs to increase the quality of their provisions and to build the supply of child care that is in limited supply in one or all of the following areas:

- Children who need care during NTH (defined as care needed a minimum of one hour prior to 7 a.m., until a minimum of one hour after 6 p.m., and/or care needed on weekends);
- Children who are English language learners;
- Children with special needs (defined as children with Individual Education Plans and/or Individual Family Service Plans); and
- Infants and toddlers (defined as birth up to 36 months).

Grant awards include, but are not limited to: purchasing educational materials, funding to support quality assured professional development, classroom furnishings, or services that will improve efficiency in operations. Grant awards may also include incentives such as professional development and technical assistance.

However, their experiences are useful in helping to frame our understanding of the issues parents face and called attention to the areas that we would like to pursue for further research. Although participants in different groups discussed their unique challenges in obtaining child care for their child or children, several common themes emerged for all parents:

Availability is an issue. Many parents described a cobbled together child care scheme, frequently relying on family and friends to fill in the gaps when children are not able to be in child care settings. This can be due to the hours of operation for centers, available slots by day, or to parents' ability to afford full-time child care all week. Parents of children with special needs also discussed their experience of being turned down by child care providers unable to accommodate their child's disability. Outdated online resources led to frustration and mistrust among these parents in particular, making the child care search even more difficult.

Regardless, parents noted their concerns at the lack of routine and general inconsistency surrounding what their children are fed and the activities in which they are participating ("device" time, watching TV,

etc.) and to what extent. Parents expressed concerns that they cannot demand that family members providing care follow their routines and rules when they are providing that care for free.

Affordability means compromise. Several parents noted they had found at least one child care situation they liked that they were not able to afford. Parents noted they found themselves having to choose between options that were "must-haves" versus those that were "nice to have." This included trading cost for situations that would accommodate their work schedule, relying on friends and family to fill in the gaps. Many parents expressed the desire for centers with cameras installed to provide families with virtual access to their child during the day; however, the cost of these centers seemed to be anywhere from \$100 to \$300 more expensive per week. For some parents, these compromises were not worth the cost, noting particularly that a week of child care for their child was on par with a week's pay. One parent, a substitute teacher, noted that for this reason, she only works when she can find family or friends to care for her child for free.

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You use up basically your full paycheck on child care, and then you're not there. As much as they're learning and stuff, you're not there to see all that, and like, it kills you.

— Parent With Nontraditional Work Hours,
April 2016 Focus Groups

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Building trust is key. All parents expressed their need to have a trusting relationship with their child care provider, noting this is the greatest emotional hurdle in choosing a child care provider. Parents expressed concern over their child's physical and psychological safety, their child's nutrition, and their social and educational development. Parents reiterated that no one can take care of and support their child the way they can. Some parents noted they took care to become friends with their child care provider, taking time to tell them about their job and their family, or to bring homemade treats to forge a connection. Parents noted that routines and good communication from their provider led to greater trust and better relationships. Even so, some parents expressed great doubt and mistrust for child care providers, noting they would not leave their child with a stranger until their child was able to express himself and provide feedback on their experience with the care provider.

Quality child care is multifaceted. Parents were asked to discuss their must-have needs from quality child care: a clean, safe, loving environment, and a day filled with structure, routine, developmental learning, and play.

- **Safety.** For parents, the physical safety of their children comes first. Parents look for qualified providers in a safe, secured building with processes and procedures to gain access. They look for age-appropriate spaces with child-proofing and appropriate adult-to-child ratios by age group.
- **Love and attention.** Parents actively sought care providers who are enthusiastic about children and who have demonstrated a career focus on child development. Although background checks are a consideration, many parents wondered whether potential providers had the temperament to care for several children day in and day out.

- **Cleanliness.** Attention to the cleanliness of the facilities was important to parents, particularly to prevent constant colds and illness that seem to come with exposure to other children.
- **Schedule and routine.** Parents want to be sure children will participate in a mix of fun and learning activities during the day, and that children will not be unsupervised or left to watch TV.
- **A Form of Monitoring.** Parents were much more likely to raise background checks and CPR certifications for child care workers than licensing as a credential for selecting a particular child care provider. Parents seemed to assume that providers are regulated and licensed.

Although they were not must-haves, parents noted that location, social and emotional development, and healthy eating were indications of quality care. Parents also seemed to prefer center-based care, noting it seemed more structured and secure.

The search for child care can be difficult and frustrating. Although all parents began to think about child care during pregnancy, most did not actively search for a provider until the baby had been born. Parents had varied experiences, noting that it took from a few weeks to months to find or determine their child care situation. Few respondents seemed aware of county-based or city-based listings, or government offices that provide assistance finding child care. Parents relied heavily on internet searches, which they noted are not an effective or reliable source for locating child care providers. Internet searches frequently turned up too many providers with out-of-date reviews or old contact information. Parents said they called and visited each location they found. Some said they just walked around their neighborhood to see what was nearby.

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When we did find the first one, I went to the daycare, and I saw some parents leaving, so I kind of like, beep, beep, pulled over the parent, like, what do you think about this daycare? So it was definitely a process.

— Parent With Nontraditional Work Hours Parent,
April 2016 Focus Groups

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Parents emphasized their reliance on word of mouth for reviews and referrals to potential child care providers. Even when they found a provider online, parents sought references whenever possible. Even so, several parents admitted that, even when they did their homework and talked to other parents, they still had to go with the provider who had space for their child at a price they could afford.

State- and Systems-Level Examination of Child Care Deserts

Researchers at CCAoA conducted in-depth key informant interviews with representatives from six states (Kansas, Ohio, Maryland, Indiana, Vermont, Florida) and a region of a state (North Carolina's Triangle region) to learn more about their studies

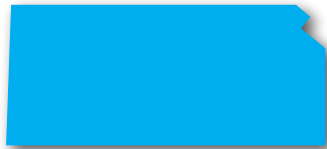
on child care supply and demand. The case studies included in this report represent a scan of the literature, the accumulated experiences of our staff, and a brief survey completed by CCAoA members. Although the studies highlighted in this report are by no means exhaustive, we hope the experiences relayed here will serve as a representation of supply and demand work being done across the country.

During our interviews, we asked each representative to describe the work being done in their state, region, or city; their motivation for studying child care supply and demand; and asked them to describe any lessons they learned along the way. A summary of what we learned is provided in this section.



Child Care Aware® of Kansas

Child Care Aware® of Kansas performed data collection and analysis of child care supply and demand across the state and partnered closely with other organizations in multiple counties to disseminate and make use of the data.



Motivation for Studying Child Care Supply and Demand

Child Care Aware® of Kansas was motivated to study supply and demand of quality child care in part due to anecdotal stories about the decrease in providers in the early 2010s. During that time, Kansas passed a law that set high licensing standards and professional requirements that impacted many child care facilities and providers in the state. Many rural areas in Kansas, where child care is supplied primarily by Family Child Care (FCC) homes, were especially affected. Child Care Aware® of Kansas felt the need to conduct a county-level analysis of data on supply and demand to better understand how these new factors in the child care field impacted families in local communities.

In addition, language in the 2014 reauthorization of the Child Care and Development Block Grant Act encouraged states to collect and share information on supply of and demand for child care services in the state. As a CCR&R with access to important local-level data on child care, Child Care Aware® of Kansas was determined to be a key player in telling the story of child care across the state and in working with local communities to assess their needs.

How Child Care Aware® of Kansas Studied Child Care Supply and Demand

In 2014, Child Care Aware® of Kansas investigated the quantitative deficit in child care supply. For each county, demand was defined as the number of child care referral requests and supply as the number of child care facility slots available. The study identified numerous counties with inadequate child care supply to meet the number of referral requests.

Impacts and Outcomes of Child Care Supply and Demand Study

The results of this study on child care supply and demand proved useful in a variety of ways for many

local communities across the state. For example, in Republic County, a largely rural area in the northern central area of Kansas, Republic County Economic Development Corporation made use of data on child care supply and demand (provided by Child Care Aware® of Kansas) to motivate and justify the need for a county-wide resource meeting. The meeting connected child care providers with major employers in the county with employees in need of quality child care and also provided an opportunity for newer child care providers to connect with more veteran providers. In addition, potential providers had the opportunity to meet members of a licensing agency and the CCR&R, and learn about financing options, encouraging the creation of more child care supply in the county. As a result of this meeting, the Republic County Economic Development website now provides consumer information on quality child care for new members of the community. The study on child care supply and demand was thus critical in battling the perceived difficulty of getting licensed for providers in this rural area of Kansas.

In addition, Child Care Aware® of Kansas's data on child care deserts provided critical information for one of their partners, United Way of McPherson County, to make the case for investment in child care. The analysis of supply and demand was instrumental in justifying use of donated funds for child care that helped build the supply of needed child care slots in the county.

Lessons Learned

Child Care Aware® of Kansas's research team began the investigative process by conducting research on other states and localities, such as North Dakota, that had conducted similar studies of supply and demand of child care. The team indicated the importance of not "reinventing the wheel," using lessons learned from other reports to ensure that data is shared and visualized in a manner that is meaningful for local audiences and state-level partners. In addition, the team emphasized the importance of county- or community-level conversations on how to document the work being done at local levels on child care supply and demand. Kansas and the counties within it are unique, and it is critical that such studies and the resulting outcomes are motivated by the individual needs of a community.

More Information

For more information on the study and data, please see Child Care Aware® of Kansas's [Data and Reports](#) information.

Please contact [Leadell Ediger](#), Executive Director at Child Care Aware® of Kansas, with additional questions or for additional information.

Developing Solutions to Supply and Demand: Virginia

[Child Care Aware® of Virginia's Mapping Project](#) includes a series of online maps that enables viewers to examine the various types of child care programs throughout Virginia. Each of the maps can be viewed from a statewide, county, community, or even neighborhood perspective. County poverty level information is also indicated on each map. The data reflects operating status as of September 2015 and includes maps for all child care programs, licensed child care centers, religious license-exempt centers, licensed and registered family child care homes, school-aged programs, Head Start and Early Head Start programs, licensed and license-exempt preschool programs, and by Virginia Star Quality Rating Level. Additionally, although not posted on the website, they have mapped the availability and quality ratings of child care centers offering services during NTH. Contact [Donna Foley](#) for more information about this project.



The Early Childhood Advisory Council of Ohio

The Early Childhood Advisory Council of Ohio funded data collection and analysis by community and research partners in the state.



Motivation for Studying Child Care Supply and Demand

To gain a better understanding of early learning and development programs in Ohio, the team took an in-depth look at [county-level profiles](#) of child care supply and demand.

How Early Childhood Advisory Council of Ohio Studied Child Care Supply and Demand

Reflecting a combination of data from census studies and diverse community partners, each profile contains a detailed breakdown of the number and types of both children in need of child care, as well as available spaces in child care. Demand was captured by such measures as children with special needs, facing economic hardship, and with limited English proficiency. Similarly, the profiles detail supply of accredited or quality-rated programs at all levels and slots available in multiple forms of child care spaces. Each county profile also contains a representation of number of the children for every early learning and development program space county-wide as a summary of the gap between supply and demand in the county.

Impacts and Outcomes of Child Care Supply and Demand Study

The findings of the report reflected a large dearth of high-quality child care slots as compared to demand, with an average of 7.2 children for every accredited, quality-rated Early Childhood Education (ECE) or Preschool Special Education program space statewide. In addition, the results demonstrated especially large deficiencies in urban areas, which were also often the best funded counties for child care.

Armed with this information on the need for increased high-quality child care spaces, stakeholders in Ohio advocated for increased support for providers in both entering and maintaining financial stability in Ohio's [Step Up to Quality](#) quality rating and improvement system (QRIS). These advocacy efforts brought about important policy initiatives in the state. Such changes included requiring publicly funded providers to enter the quality rating system by 2020, as well as modifying subsidy payments in rate categories to better support providers in rural areas and in the process of transition into higher quality ratings.

Lessons Learned

Throughout the process of creating and communicating the incredibly impactful results of this child care supply and demand study, the team of researchers in Ohio overcame multiple challenges and learned important lessons on how to make this data useful and meaningful. In collecting data from agencies, researchers faced the challenges of varying definitions and data collection processes across agencies and were forced to work around these difficulties to standardize data. For example, subsidy supply data was usually based on licensed capacity, whereas pre-kindergarten data was typically based on enrollment. In addition, figuring out how to communicate the data effectively demonstrated the importance of keeping the analysis report clear, concise, and easy to read. Finally, although the gap between supply and demand may have been discouraging and may not have reflected positively on work in Ohio's child care space, it was extremely important to identify and share the lack of child care supply.

More Information

For more information on the study and data, please see Early Childhood Ohio's [Early Learning and Development County Profiles](#).

Please contact [Todd Barnhouse](#), CEO of Ohio Child Care Resource and Referral Association, with additional questions or for additional information.

Maryland Family Network LOCATE: Child Care

Maryland Family Network
(MFN) LOCATE: Child

Care conducts an annual analysis and reporting of the state's child care supply and demand. Child Care Demographics are done to assist in service delivery (e.g. child care start up and expansion, etc.), as well as to generate and disseminate a meaningful data-driven tool to spark discussions with legislators and family advocates.

Motivation for Studying Child Care Supply and Demand

It was the vision of late Executive Director Sandra J. Skolnik that MFN collect and analyze data on Maryland's child care needs and that information be shared with legislators, advocates, and families. That vision continues under the leadership of current Executive Director Margaret E. Williams. Since its creation in 2009 (the resultant merger of two non-

profits: Maryland Committee for Children and Friends of the Family), MFN has utilized research and reporting to inform legislators, administrators, and family advocates and catalyze change for families in Maryland.

How MFN Studied Child Care Supply and Demand

MFN provides referral services to families across Maryland in search of child care. MFN maintains a comprehensive *supply* database on all licensed, regulated child care. After receiving basic information from licensing, MFN solicits programmatic information such as hours of operation, fees, available services, languages and curriculum, among other topics, from new programs and providers, as well as regular updates to their database with existing providers. *Demand* data is collected through parent intakes completed when a call is made to the LOCATE: Child Care referral service and includes geographical information, what the parent is looking for, and child and family demographics. The resulting demographic report not only provides a composite picture of supply and demand statewide, but breaks data down by



jurisdiction showing child care clusters and possible shortages of needed care programs.

Impacts and Outcomes of Child Care Supply and Demand Study

Child Care Demographics, as well as other data-driven resources and materials developed by MFN, has become an integral tool for planners and policy advocates and a much-anticipated resource for legislators, representing the best interests of constituent families and allowing for a closer look at trends in supply and distribution in each jurisdiction. As noted in *Lessons Learned*, communication between administrators, referral specialist, researchers, and policy advocates helps to identify trends as the report is developed and distributed. When referral specialists identified a spike in referrals for parents whose young child had been expelled from their child care provider, MFN dug deeper to gain an understanding of this growing issue. This research led to a pilot program matching early childhood behavioral health specialist with children facing possible expulsion; with minimal cost, specialists were able to significantly reduce expulsions by providing coaching to providers and families in working with children's behaviors or finding programs that better fit the children's needs. This Early Childhood Mental Health Consultation program was implemented statewide and has been helping to meet the needs of Maryland's families for more than 10 years.

Lessons Learned

As noted above, the communication loop between MFN administrators and referral specialists, researchers, and policy advocates contributed to the demographic report's evolution into a useful tool for planners, policy makers and family advocates,

as well as pointing to possible trends as the annual report is completed. Referral specialists, as a result of talking to both parents and providers, are the front line in alerting administrators, researchers and policy advocates to potential issues parents or providers are facing. Likewise, analysts are in regular contact with administrators and policy advocates to ensure they meet their needs and help them to answer incoming questions and requests for information whenever possible. One thing that has made MFN's Child Care Demographics so vital to policy work in Maryland is that the report speaks directly to the needs planners and policy makers are looking to address. Tailoring language and reporting to be easily understood by legislators and advocates, parsing data by jurisdiction, and highlighting trends without bias make this information accessible for a wide audience.

MFN also emphasized the importance of maintaining data consistency over time. They noted the benefit of having consistent individuals pull, clean, and analyze data over time, ensuring that data makes sense and that it is pulled from their database at the same time of year. It is importance to have a clear idea of the ultimate goals and objectives of data collection and reporting efforts, and to regularly assess whether the data that is collected addresses stakeholder's needs, particularly as those needs change and evolve over time.

More Information

For more information on MFN's annual demographics report and to download the 2016 report, go to their [website](#).

Please contact [FloJean Speck](#), Director of LOCATE: Child Care at MFN with additional questions or for additional information.

The Indiana Association for Child Care Resource and Referral

The Indiana Association for Child Care Resource and Referral (IACCRR) set out to assess child care need in Indiana's counties in order to best focus efforts at building quality child care for Indiana's young children (birth to age five). They were particularly focused on understanding the need for quality care among families eligible for CCDF funds.



Motivation for Studying Child Care Supply and Demand

The Indiana CCR&R system had a long history of using supply and demand data to inform recruitment and retention efforts of child care programs. The CCR&R gained a huge opportunity to advance the work even further when the state funder, the Indiana Family and Social Services Administration (FSSA), approved funding for an Outreach Specialist position in all nine service delivery areas. A primary outcome of the position was to increase the number of high-quality child care spaces available to Hoosier families. To best inform the efforts of these new staff, IACCRR analyzed and disseminated data for local CCR&R use when establishing their recruitment and retention strategies. By analyzing the data, CCR&R were better suited to set goals for recruiting and retaining new programs—and could use licensing data to demonstrate their efforts were successful by reporting monthly on the number of new spaces in high-need areas.

How IACCRR Studied Child Care Supply and Demand

IACCRR examined child care supply and demand of high-quality care in all 92 counties across the state. They collected statistics on population, employment, Child Care Development Fund (CCDF) voucher usage, child poverty, and created a capacity- to-need ratio. The resulting database includes the state's most comprehensive information about supply, demand, cost, and quality data. This information was uploaded into a [publicly accessible data portal](#) where users can access reports by region and county on unmet needs for high-quality care.

In 2014, IACCRR advanced its efforts in data services by producing dynamic heat maps that could be used by CCR&R, advocates, government agencies, and funders to accurately identify geographical areas with the greatest need for high-quality programs. Through its partnership and data sharing agreement with the Indiana FSSA, IACCRR was able to acquire geocodes for all children with CCDF vouchers. The geocodes were displayed on a map, with areas with the most concentrations of children with CCDF vouchers appearing in dark red. IACCRR used child care program geocodes from The National Data System for Child Care (NDS) database to add a supply layer to the map. The initial maps were available both as hard copies and online as live maps, allowing the users to zoom into specific neighborhoods as needed.

Developing Supply and Demand Solutions: New York

New York offers higher subsidy rates for approved counties with a need for NTH child care. Counties must apply for this designation and the state makes approval determinations, as well as the subsidy increase rate. The NY Office of Children and Family Services (OCFS) has a [website](#) that allows parents to search for NTH child care.

In their [FY 2016 – 2018 CCDF Plan](#), NY coordinated with the statewide network of CCR&R, which prioritized increasing the supply and improving the quality of child care services in general, as well as for children who receive care during NTH. CCR&R receive requests for care during NTH from parents requiring part-time, drop-in, evening, weekend, overnight, and rotating care. CCR&R work with families, but this care is difficult to find. Currently, local districts can pay up to 15 percent above the applicable market for NTH. OCFS plans to revisit the existing enhanced subsidy rate for providing care during NTH, to require a minimum enhanced rate of five percent above the applicable market rate, with local district option to go up to 15 percent above the market rate.



Impacts and Outcomes of Child Care Supply and Demand Study

The success of the initial maps led to an expanded usage of dynamic mapping as a catalyst for effective CCR&R recruitment strategies, as well as a valuable tool to illustrate rationale for increased public and private investment in quality and supply building efforts. In particular, the maps were an integral component of ramp up for the Indiana five-county preschool pilot, On My Way Pre-K. Maps were used in multiple capacities, including informing targeted recruitment of high-quality preschool programs by identifying the geographical areas of where the most eligible preschoolers lived. Later in the same year, the IACCRR maps were used by advocates to make a case for increasing funding for preschool vouchers for children in Indianapolis. The maps were available to government officials who made the decision to fund the vouchers through the Indy Preschool Scholarship Program. The maps also were highly effective in securing private funds to improve the quality of community-based pre-K programs; thus, adding significant funding to CCR&R and helping to create new public-private partnerships.

Lessons Learned

Using their mapping software, IACCRR could analyze supply and demand challenges at the neighborhood level. Examining child care supply and demand on a local level was much more effective and provided much more valuable information than looking at need from a state or even a county level.

IACCRR's mapping capability drew great interest and additional use within Indiana. Decision-makers, front-line staff, funders, and advocates alike were ultimately more informed, and therefore, could be more confident in their investment of time, talent, and treasure toward a shared goal of affordable accessible, high-quality child care for all Indiana families.

More Information

For more information on Indiana's current work on supply and demand, please log on to the data center at <http://datacenter.iaccrr.org>.

Statewide programs and services have transitioned from IACCRR to Early Learning Indiana. For more information on Indiana's current work, please contact Sue Burow, Director of Data Informed Practice.

Child Care Services Association (North Carolina's Triangle Region)

Child Care Services Association conducts a biennial study of child and family population for children birth to 12 and the region's capacity, quality, and cost of available child care in North Carolina's Triangle region.



Motivation for Studying Child Care Supply and Demand

Child Care Services Association (CCSA) has a long history of data-driven reporting in response to issues affecting the region's children and families. Grounded in a culture of research, CCSA has been doing regular supply and demand studies on North Carolina's Triangle area (Durham, Orange, and Wake counties) for over 20 years. They first posted the digitized version of their *The State of Child Care in the Triangle* report eight years ago in conjunction with the opening of their new office building in Durham.

Although they had previously developed a formal hard copy report of findings, the web-based reporting option allows CCSA to expand their region of study, as well as to make the report more visually appealing to policymakers and advocates. CCSA does not receive funding to develop and disseminate this report, so the timing, format, and purview of this document is often subject to their capacity and the resources they can allocate to this task. This year, CCSA expanded their report to include findings from the nine counties (Alamance, Caswell, Durham, Franklin, Granville, Orange, Person, Vance, and Wake) they serve.

How CCSA Studied Child Care Supply and Demand

CCSA utilized a number of existing databases to populate their report, pulling supply data largely from their referral database, Child Care Referral Central, and from NDS, as well as from their licensing agency North Carolina Division of Child Development and Early Education. CCSA pulls demand data for their report from the American Community Survey's website, supplementing this with local data on schools and education from their Department of Public Instruction. CCSA does a broad-based demographic study with an emphasis on the child population (under 12) and low-income populations.

Impacts and Outcomes of Child Care Supply and Demand Study

The biennial supply and demand report has become a hotly anticipated tool for state and regional policymakers, funders, and advocates who are the chief stakeholders; the report is widely available on CCSA's website. CCSA highlights key findings whenever possible, calling particular attention to the high cost of child care, the availability (or lack) of quality providers in communities in need, and the gap in the number of children receiving subsidies versus the number of children who are eligible to receive subsidized care. These findings are of particular interest to policymakers and advocates who utilize this information in discussions on gaps in child and family services in the region.

Lessons Learned

CCSA noted several lessons learned in developing and disseminating this report over the years, not the least of which included the use of the same data analyst for the last several iterations of their report. Data pulled from multiple state and national databases can often require a great deal of data cleaning in order to make it usable for this report. CCSA's data consultant brings years of expertise and familiarity with their report and databases, lending to a consistent, efficient reporting process. In addition, this consultant has developed a codebook and provided some cross-training for CCSA staff on this process.

In addition, timing is a key factor for CCSA. Although timing of the report can often depend on the organization's available resources, the data is typically pulled at the same time of year, once staff have determined that most of the data has been entered by counselors. This ensures that the organization is able to provide as much data as possible, but also protects the integrity and accuracy of the data for the most recent reporting period.

Finally, CCSA noted the importance of maintaining a useful, relevant document for key stakeholders. CCSA faces an ongoing battle in providing stakeholders with a data-driven, informational document while delivering a readable, easy-to-use resource. With limited resources, CCSA will review potential areas in this document to add more narrative and interpretation of their findings, as well as areas where different kinds of graphics or



infographics may be helpful. Of note, CCSA cited the use of interns from area universities, in particular the local school of social work, as a potentially valuable resource in working with data, populating data tables, and lending graphical expertise to make the report more visually appealing.

More Information

For more information on the study and data, please see Child Care Services Association's [Research & Reports](#) section.

Please contact [Vivian Eto](#), Senior Director of Family Support at Child Care Services Association, with additional questions or for additional information.

Let's Grow Kids (Vermont)

Let's Grow Kids is a public awareness and engagement campaign about the important role that high-quality, affordable child care can play in supporting the healthy development of Vermont's children during their first five years.



Motivation for Studying Child Care Supply and Demand

In 2015, the campaign launched an initiative called Small Talk with several partner organizations to collect the personal stories of Vermonters whose lives have been impacted by the state's early childhood system. By working closely with communities in counties across the state, Small Talk captured numerous stories from parents, providers, business leaders, grandparents, and community leaders—many of which highlighted family challenges related to finding and affording high-quality child care. Motivated by these stories of shortage in access to care, Let's Grow Kids in partnership with a team of stakeholders, embarked on a journey to quantitatively study the supply of and demand for regulated child care in the state.

How Let's Grow Kids Studied Child Care Supply and Demand

To collect accurate, comprehensive data on supply and demand, Let's Grow Kids worked closely with numerous stakeholders, each holding a different piece of the child care puzzle. The data collected highlighted meaningful supply and demand measures to capture a more precise picture of the landscape. Demand was defined as the population of infants and toddlers with all parents in the labor force (referred to as children likely to need care), and supply as the number of regulated and high-quality regulated provider-reported slots offered.

To represent and communicate the project's analysis in an accessible format, the team worked closely with an internal cross-functional team and the campaign's creative director to devise a thematic representation for the information: Stalled at the Start. Each county was profiled using red, yellow, white, or checkered racing flags to represent the percentage of demand that does not have access to regulated or high-quality child care. The analysis revealed that almost half of Vermont's infants and toddlers that are likely to need care statewide do not have access to regulated child care—a proportion that increases to 79 percent when

considering high-quality child care. Variation across counties was quite large, with up to 98 percent of infants and toddlers likely to need care without access to high-quality care in one county.

Impacts and Outcomes of Child Care Supply and Demand Study

Armed with creative and thoughtful representation of child care supply and demand across Vermont, Let's Grow Kids released its report and findings to the public through two community events; one in northern Vermont and one in southern Vermont. The report garnered positive regional and statewide media attention, as the team tied the data with impactful conversations with families and providers alike to create a compelling narrative. The impact of the report was further extended by coverage on Vermont Public Radio and community *Steer the Conversation* discussions hosted by the Let's Grow Kids field team with community members and elected officials in almost every county statewide.

Lessons Learned

This successful and extensive study could not have been achieved without the diverse working group of stakeholders including the Vermont Department of Health Maternal and Child Health Division, Vermont Department for Children and Families Child Development Division, Building Bright Futures, and Vermont Birth to Five—who advised Let's Grow Kids' work in collecting, communicating, and disseminating its analysis. Thus, the Let's Grow Kids team shared a critical component of the process was the importance of working in coalition rather than in isolation. In addition, the team shared the value of careful consideration of how data visualization can impact the usability and adaptability of findings from this type of analysis for a wide set of people. Data should be presented in a manner that is easy to read, interesting, and connected to symbols or a theme that is commonly relatable.

More Information

For more information on the study and its findings, please see Let's Grow Kids' [Stalled at the Start report](#).

Please contact [Jen Horwitz](#), Policy & Research Director at Let's Grow Kids, with additional questions or for additional information.

Florida's State Advisory Council on Early Education and Care

Florida's State Advisory Council on Early Education and Care commissioned the University of Florida Childhood Needs Assessment Partnership, a collaboration of the Family Data Center and Lastinger Center, to generate a needs assessment of supply, demand, and quality of early learning programs in Florida.



Motivation for Studying Child Care Supply and Demand

The study was motivated by the desire of early learning stakeholders to be able to identify well-served and underserved areas in the state at varying geographic levels, from county and zip code levels to statewide. Wanting to ensure that the study would remain fresh, relevant, and usable in future years, the team decided to create an [interactive online data portal](#) that would be updated each year reflecting the results of the study.

How Florida's State Advisory Council on Early Education and Care Studied Child Care Supply and Demand

By gathering data from numerous sources across the state, the team created a data portal with detailed data on both demand (children and families) and supply (capacity and quality of early childhood providers) across local and statewide levels. Demand side data included not only number but also demographic characteristics and risk factors of children from birth through age five in Florida. These risk factors included traits such as mothers smoking during pregnancy, homelessness, and a nontraditional work schedule. Supply side data reflected both licensed capacity and enrollment in early care and education programs. In addition, the team conducted surveys of Florida's early learning coalitions to gain an understanding of quality assessments used by the coalitions.

All of this data was input into a publicly available database in which users can customize data searches to construct reports on the state of supply and demand at varying geographic levels. This data is updated annually based on data feeds from major departments in the state that provided data for the original study. In addition, the database is capable of continued growth and expansion, with the inclusion of additional layers of information such as funding data when requested.

Impacts and Outcomes of Child Care Supply and Demand Study

In a [needs assessment report](#) analyzing the findings of this data study, the team discovered an oversupply of early childhood education slots. With a 41 percent average vacancy rate of slots in the state, there were notable differences between counties in amount of supply relative to demand. This result, while ostensibly positive, has important negative implications regarding the quality of child care as well. Not all slots available provide high-quality services that effectively support early learning, and the early learning market's susceptibility to market failure has caused the issue of oversupply to drive prices high for both families and providers. The needs assessment thus discusses the resulting "quality deserts" in early child care and education across the state. In addition, the poor quality of child care programs also undercut the efficacy of QRIS systems in Florida, which ended up pumping money into low-quality, financially fragile child care. The outcome of the study thus painted a surprising and concerning picture of the challenges facing child care in the state.

Lessons Learned

The team gathering and analyzing data emphasizes the exceptional quality and level of data available when multiple organizations across the state, such as the Florida Office of Early Learning and Florida Department of Education, collaborate to collect comprehensive data. The team highlighted the importance of unbiased analysis of data, allowing raw numbers rather than expectations about child care to guide findings. Study findings were unexpected based on previous assumptions about the challenges facing early child care and education in Florida, and the team devoted critical effort to challenge and refine thinking around these issues based on the results.

More Information

For more information on the study and data, please see the University of Florida Childhood Needs Assessment Partnership's [Needs Assessment report](#) and the [Florida Early Care and Education Needs Assessment Web Portal](#).

Please contact [Abby Thorman](#), [Roland Estrella](#), or [Lisa Langley](#) with additional questions or for additional information.

In Summary

Although the states we sampled for this paper varied greatly in their studies of child care supply and demand, common themes emerged in their lessons learned:

Study outputs should be tailored to your audience. Five sites advised that key stakeholders' needs should be at the forefront of study planning and final reporting. Vermont's Let's Grow Children, Maryland Family Network, and CCSA in North Carolina each emphasized presenting data in a format that is easy to use and meaningful to the target audience, generally policy makers, advocates, and in some cases, parents and providers. Data collection is expensive and time consuming and should always be collected with a purpose. Data collection and reporting should also be revisited on at least an annual basis to determine the relevancy of messages, fields, and trending for key stakeholders.

Child Care Aware® of Kansas and IACCRR each discussed their decisions to look at supply and demand data on a community or neighborhood level. Both sites noted their key stakeholders' need for local data to inform policy and decision-making and to justify investments of time and resources. Child Care Aware® of Kansas noted particularly the uniqueness of each county making it all the more important the results be individualized.

Maintaining consistent, quality data is key. Three states called out the importance of maintaining consistent, quality data. Both CCSA in North Carolina and Maryland Family Network emphasized the importance of consistency in pulling data from year to year. Each site also noted they were lucky to have the same person or people pulling data each year, since data analysts had set protocols and were very comfortable with the datasets in which they worked, making the process run smoothly. Florida's State Advisory Council on Early Education and Care noted particularly that, as their findings were unexpected, it was vital that data was reported clearly. In addition, when states and organizations use data from various entities, it is important to develop and maintain data dictionaries and map data variables for consistency across data collection systems.



Two heads are better than one. Three states noted the importance of coming together as a team in order to effectively study supply and demand, although they did it in different ways. Let's Grow Kids in Vermont used a working group of key stakeholders from several departments across the state to inform the data collection, analysis, and reporting process. Florida's State Advisory Council on Early Education and Care also partnered with other organizations in the state to obtain a comprehensive data set. In a different way, Maryland Family Network makes good use of a feedback loop between their referral specialist, researchers, and policy office to ensure they are collecting and portraying an accurate portrait of child care supply and demand in the state.

Don't reinvent the wheel. Before beginning their supply and demand study, Child Care Aware® of Kansas looked to their neighbors' recently completed supply and demand studies to inform their process. Think about other available resources that can be tapped. Often other CCR&R, state agencies, and private organizations have data that can be shared and used to answer supply and demand questions.

Think outside the box when managing resources. Although some states received funding that covered their study, others supplemented their data collection and reporting efforts with external help. CCSA in North Carolina's Triangle region reported they are often able to solicit help from social work graduate students who are adept at running, cleaning, and analyzing data.

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I'm just concerned if some of these daycares have a valid and proper license, and if they're renewing it, and if they have CPR and the other stuff.

— Parent Of A Child With Special Needs,
April 2016 Focus Groups

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Policy Recommendations

Early, quality child care provides a solid foundation for children's academic and behavioral success. Research has shown that high-quality early childhood programs contribute to stronger families, greater economic development, and more livable communities. Investments made when children are very young generate returns that accrue over their lifetimes.^{34, 35} For children of disadvantaged families, economists have estimated the rate of return for high-quality early intervention to be in the range of 6-10% per annum with long-term returns on investment as high as 16%.³⁶ Investments in child care expansion thus help to ensure that children have access to safe learning environments and that parents are able to contribute to the local economy. Existing child care centers in underserved areas must work to address these issues by expanding child care hours and working with state and federal agencies to secure access for all families.

In our review of a number of states that have explored supply and demand inequities in child care, we found that these deserts are especially prevalent in low-income communities, rural communities, among families of color, families with infants, and families with irregular or nontraditional work schedules. It is imperative that family child care is considered and supported as a viable option in every community to address child care deserts. There is an overall need to understand supply and demand challenges within a community, ensure the ability **to collect data available on supply and demand, create unbiased analysis of data, and generate community solutions.**

There are several specific recommendations and policy solutions Child Care Aware® of America is seeking for child care programs:

Increase Funding and Resources

Increased funding and resources provide sufficient local, state, and national public investment to optimize and leverage CCR&R capacity to support the new requirements under the Child Care and Development Block Grant (CCDBG) Act of 2014. Public investment is not the only answer to the child care challenge, but it is a major part of the solution on the shortage of licensed child care.

- Authorize funds to support data collection to help CCR&R and their state partners identify child care deserts and develop strategies to address the demand for high-quality child care.
- Authorize funds for pilots in high-poverty communities to explore strategies that blend multiple funding sources to better meet the child care needs of working parents, meeting the criteria of the strongest funding stream to ensure safe, quality care for children.
- Increase the availability of licensed care using policy strategies such as increasing subsidy rates for providers offering care in communities with child care deserts.
- Tier subsidy rates or add quality bonuses so that high-quality providers are reimbursed at higher rates, which provides equal access to families receiving child care assistance through CCDBG.
- Increase the use of CCDBG child care contracts in areas with child care deserts.
- Allow high-quality, community-based ECE providers to participate in publicly funded pre-K programs.
- Fully utilize available Early Head Start-Child Care partnership grants.
- Support and encourage tax credits tied to quality for families using child care, child care providers, and investors.
- Pursue policies that make licensed care more affordable to families.

Invest in Infrastructure

We show how the lack of facilities and infrastructure impacts the inadequacies to meet the demand for child care today and in the future. As a result, additional facilities will be needed, ranging from larger scale centers to family child care spaces. There is vast opportunity in both the private sector and public funding sectors to fill this gap. States and communities looking to build supply must give priority to building the infrastructure necessary to coordinate and manage the functions essential to the success of child care programs. These critical functions include planning, personnel development, training and technical assistance, program evaluation and continuous quality improvement, ongoing coordination and communication.

- Ensure that infrastructure investments are carefully planned and are tied to ongoing business training and professional development to increase sustainability and protect investment.
- Encourage eco-friendly environments by working with parks and recreation departments and utility companies to address energy efficiency that can generate operating savings and create healthier indoor spaces.
- Work with community development resources to identify capital for ensuring that community infrastructure includes child care.
- Work with public officials and community advocates to expand spaces (where appropriate) and improve the facility quality.
- Incentivize businesses to join in public and private investments to develop and support child care spaces in communities. For example, in Georgia employers who purchase or build qualified child care facilities are eligible to receive Georgia income tax credits equal to 100 percent of the cost of construction.

Adequately Support the Child Care Workforce

Adding child care infrastructure and physical space is one challenge, but staffing these facilities is an even greater challenge for most communities. In addition to attracting workers, training, coaching, and mentoring is essential for retention and providing workers with the key information and skills needed to support children's growth and development. Well-prepared and supported

providers are better able to offer quality care and learning opportunities to children and attract parents to their programs. In addition, offering and supporting education, training, and coaching creates a professional environment that can help programs and centers recruit and retain providers, which is an important ingredient for child development consistency.

- Provide resources for child care providers to strengthen skills and competencies of the workforce, aligned with the National Academy of Sciences report, Transforming the Workforce for Children Birth through Age 8: A Unifying Foundation, which offers providers the skills they need by coordinating activities with other community service providers.
- Require community-based training that is intentional, sequential, competency-based, tied with coaching and mentoring, tied to outcomes.
- Examine ways to increase the child care workforce incomes through the expansion of subsidized services.
- Promote articulation agreements between community-based training organizations, community colleges, and universities to ensure that available training and educational opportunities lead to progressive credentials and degrees.
- Tie the obtainment of credentials and degrees to a well-defined and commonly accepted career lattice that includes salary and benefit recommendations and aligns with regulatory and QRIS requirements.
- Provide additional supports to potential child care providers within areas of child care deserts through scholarships, coaching, and microenterprise grants.
- Consider the use of shared services and child care networks in areas of high need to provide necessary infrastructure, support, and recruitment.
- Develop partnerships between departments of education and Early Head Start-Child Care programs to offer shared professional development opportunities.

Strengthen Community Capacity Building

Community capacity building often refers to strengthening the skills, competencies, and abilities of people and communities in developing societies so they can overcome the causes of their challenges. It is clear that there must be a focus on child care community-related capacity building. Helping communities measure supply and demand and understand the challenges with supply and demand is key to creating strategies that meet their unique child care needs. To support community capacity building in child care, it is critical to:

- Leverage child care resources and referral agencies as a conduit for supply building in areas of training, technical assistance, and services for families.
- Provide resources for planning and developing child care capacity to increase the availability of developmentally appropriate high-quality child care options for working families.
- Increase community-level understanding and support of the importance of high-quality child care programs by increasing school readiness and reducing the achievement gap, augmenting economic development and the return on investment, and breaking the cycle of poverty.
- Develop new strategies to finance and sustain Family Friend and Neighbor (FFN), ensuring that they are supported in moving along the quality continuum with an overall goal of becoming licensed and participating in state QRIS systems. Funding should also include efforts to improve program design and innovation, provision of services, and additional research.
- Consider shared service and provider networks as a mechanism to support capacity building.

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About Us

Child Care Aware® of America is a national membership-based nonprofit organization working to advance affordability, accessibility, development and learning of children in child care. Founded in 1987, we advocate for child care policies that improve the lives of children and families, lead research that advances the child care and early learning field, leverage technology to help families make informed decisions about child care, and provide professional development for child care providers.

Vision

Every family in the United States has access to a high quality, affordable child care system. The child care system supports children's growth, development and educational advancement and creates positive economic impact for families and communities.

Mission

We advance a child care system that effectively serves all children and families.

Our work is strengthened by a national network of child care resource and referral agencies and diverse members and partners.

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