

EXECUTIVE SUMMARY

Summit County Childcare & After School Care Needs Assessment

Introduction and Report Organization

Root Policy Research was contracted by Early Childhood Options and Summit County to conduct an analysis of childcare usage and demand in Summit County, Colorado. Root has previously conducted similar studies for childcare demand for the Town of Breckenridge and Summit County as a whole. This study expands our historical approach by including out-of-school time care needs for children aged 6-12 (in addition to early childhood childcare needs). The study is organized around the following sections:

- **Section I. Socioeconomic Trends** - summarizes relevant demographic and employment trends in the county.
- **Section II. Care Options and Capacity** - documents existing childcare options, and discusses the economic impact of childcare.
- **Section III. Parent Preferences and Needs** - offers a detailed review of survey responses from parents/guardians of children under age 12 throughout the county.
- **Section IV. Provider Perspectives** - reports results from interviews and surveys of current childcare providers in Summit County (including ECE, after-school, and license-exempt providers).
- **Section V. Demand Analysis** - contains the analysis of current and future demand for licensed childcare in Summit County.

Summary of Top Findings

This report utilizes the best data available and input from both parent/guardians and providers to identify Summit County's top needs related to childcare and after school care provision. It is important to note that unknown variables—economic fluctuations, household choices/preference, and housing availability and affordability—will all influence future demand for care to some extent. To achieve greater certainty in meeting childcare demand, the County should monitor indicators of changes in demand and capacity. Key findings from the report are bulleted below, followed by a summary of top needs.

Socioeconomic trends and childcare capacity:

- Summit County is home to 4,367 total children: 1,485 children are under age 6 and 2,882 are between 6 and 12. The state demographer forecasts an increase in the number of children in the county over the next 30 years. Seventy three percent of children in Summit County have all parents in the Labor Force and are therefore likely to need some type of childcare or after-care.

- Existing licensed childcare providers can serve up to **661 children** daily. There are currently 726 children enrolled in childcare and 559 are on a waitlist.¹ Children under 2 comprise 65% of the waitlist², but only 22% of enrollment, highlighting the dire need for additional infant care in the county.
- At the time this report was drafted, after-school care options were able to serve 285 school-aged children. However, since Keystone Science School (KSS) cut programming, the capacity has dropped to 205 children. Even before KSS program reductions, all after school programs that were either site-based or provided transportation from schools were near capacity or had a waitlist.

Parent/guardian perspectives:

- According to the parent survey, two-thirds of all households with children under age 6 are regularly using some type of childcare (and another 4% are not using care right now only because of COVID-19).
- The most common type of non-parent childcare utilized by Summit County households is a childcare center—45% of children under 6 are in this form of care at least once a week—followed by nanny (26%), friend or relative care (26%), public preschool (19%), licensed family care provider (16%) and part-day preschool (10%). In addition, one-third (32%) of households cover some childcare needs by parents arranging their schedules or stay home with children part-time. Many households are using multiple types of care throughout the week. In fact, households with children under 6 are using 1.75 different types of care per week on average.
- Among parents not using regular childcare, the most common reasons are that the “waitlist is too long” (or “my child is on the waitlist”), followed by “can’t find/get into quality care,” and “can’t afford it.”
- Waitlist, availability (days needed are not available) and affordability were also top challenges reported by those currently using childcare. Finding care for an infant was a critical challenge and affected 39% of all respondents (and a majority of households with an infant or young toddler).
- For school-aged children, participation in after-school activities (and what types of activities were common) varied by socioeconomic status and geography. Organized sports and lessons of various kinds (e.g., art, music, etc.) were more prevalent among households earning over \$50,000 compared to lower-income households. Lower

¹ Some children on the waitlist may also be included in the currently enrolled figure as they could be waiting for additional days/hours.

² Includes unborn children on the waitlist.

income households were much more likely to enroll their child in a before/after school program offered at their child’s school or by a childcare center.

- Among parents who do not regularly send their school-aged children to care providers nor activities after/before school, many indicated that it was important to them to spend time with their children (22%) and others said they and their partner worked different shifts so they do not need after school care (16%). Affordability and availability were also top concerns, driving the need for after-care for 14% and 12% of households, respectively.
- Parents were also asked to indicate changes they would like to see in their before/after school care arrangements. The vast majority (83%) would like to see at least some type of change, most commonly (48%) for more and/or different activities to choose from for after school care. Nearly a third also indicated that they would like to have better transportation to care (29%), better academics/homework assistance (28%), and a location in their child’s school (27%).

Provider perspectives:

- As part of the study, Root Policy Research surveyed Summit County childcare providers (for children under 6) to assess perceptions of demand and barriers to providing care. Thirty-three childcare providers responded to the survey. Root also interviewed licensed-exempt Spanish-speaking providers. Early childhood care providers identified the following challenges:
 - There has been a notable increase in demand and there are simply not enough childcare spots in the county.
 - Biggest challenges for both Center directors and family care providers are low pay/benefits and finding/retaining quality staff.
 - Operational challenges are also common including financial challenges/making ends meet as well as managing enrollment, waitlist and capacity.
 - Some also face regulatory challenge (license requirements, CCCAP reimbursement, paperwork, etc.).
- Root also conducted interviews with a variety of before/after school care providers offering consistent programs to elementary school students (ages 6-12). Key challenges from their perspective include:
 - Strong demand, especially for site-based options (or those providing transportation);
 - Staffing is a huge challenge—both finding and retaining staff, particularly when pay is low and hour are part-time (by definition).

“For afterschool care to be successful in Summit County, it needs to be consistent, affordable, and site-based.”

– Summit Count stakeholder

- Operation and funding barriers make it difficult to sustain programming.
- Need for additional providers and options; the current system is overly reliant on relatively reliant on program providers for whom childcare is not a primary mission;
- Need for regional coordination, including with the school district and County.
- After-care providers suggested solutions to ensure that afterschool childcare for K-5 students in Summit County is sustainable, affordable, and practical. Most of these solutions revolved around the county playing a larger role in helping coordinate and fund K-5 afterschool programs.

Top Needs and Recommendations

- Provider data indicate that **demand for childcare far outstrips the supply**—as indicated by the waitlist of 345 children wanting care (or additional days). Population forecasts for the county indicate an increase of young children living in the county and birthrate trends seem to support that forecast. If the population does increase as projected and the same proportion of children living in the valley need childcare in the future then the gap between supply and demand will continue to widen.
- The **shortage of early childhood care is most acute for infants** and young toddlers. The County and its partners should work together to increase capacity for care particularly through this age group, despite the inherent financial/operational challenge unique to infant care. This could include tailored subsidies, facilities, and/or programming.
- **Childcare affordability** remains a challenge for many families, despite local tuition assistance programs. The County should explore options for extending tuition assistance countywide for all age groups.
- The **current after-school care infrastructure is insufficient** to meet demand for site-based (or transportation-provided) affordable care. Families are facing an acute need for immediate care following KSS program cancellations but there is also a long-term need for reliable, consistent after-care options.
- The County and its partners should **explore options for better coordination and additional funding to increase the success and reliability of after care options**. This should include partnership with existing providers but also research on more centralized models (e.g., Discovery Link, or School Care Works, and Denver Public Schools). Centralization can lead to greater efficiency but it should be approached in ways that preserve existing provider partnerships and options for parents.