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Summit County Childcare & After School Care Needs Assessment

PREPARED FOR:

Early Childhood Options
Summit County

CREATED

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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 reliable 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.

SECTION I.

SOCIOECONOMIC TRENDS

SECTION I.

Socioeconomic Trends

This section summarizes the demographic and employment trends in Summit County to provide context for the childcare needs assessment.

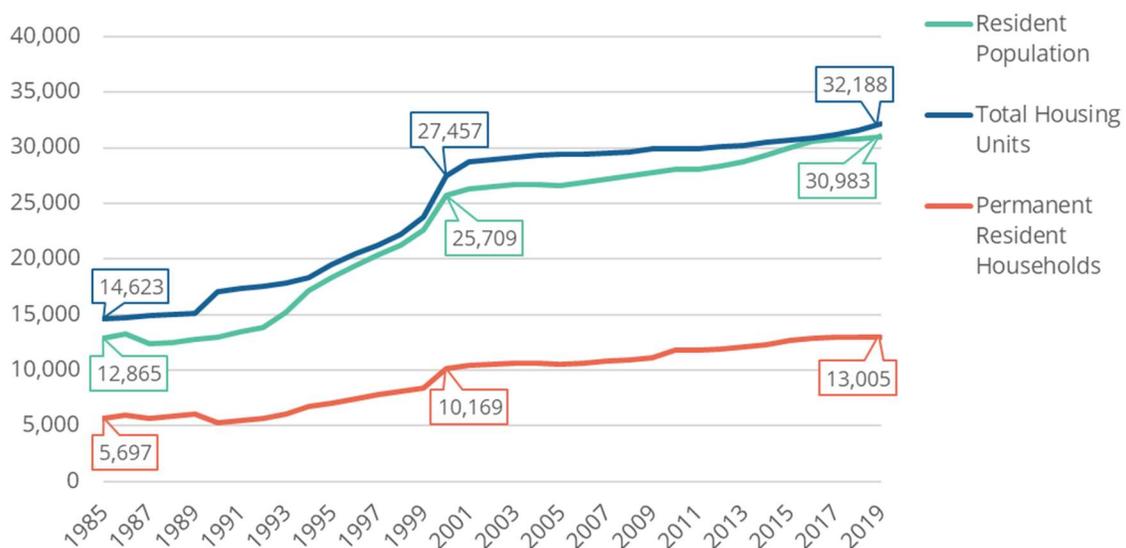
Demographic Profile

Summit County includes the towns of Breckenridge, Frisco, Silverthorne, Dillon, Keystone, Copper Mountain, Heeney, and Montezuma. The following section summarizes socioeconomic trends in Summit County to establish the context for discussing current and future childcare needs in the community. Where possible, data are provided for the county overall as well as for larger communities within the county.

Population and households. As of 2019 (the most recent data year available), there were 30,983 residents occupying 13,005 households in Summit County. Another 19,183 housing units in the county are non-permanent residents or vacant households, largely second homes and/or seasonal/recreational homes (including short-term rentals).

Figure I-1 displays trends in population, housing units, and permanent resident households in Summit County between 1985 and 2019. The county's population has steadily increased since 2000, but not at the same rapid rate of increase that took place during the 1990s.

Figure I-1.
Population and Households, Summit County, 1985-2019



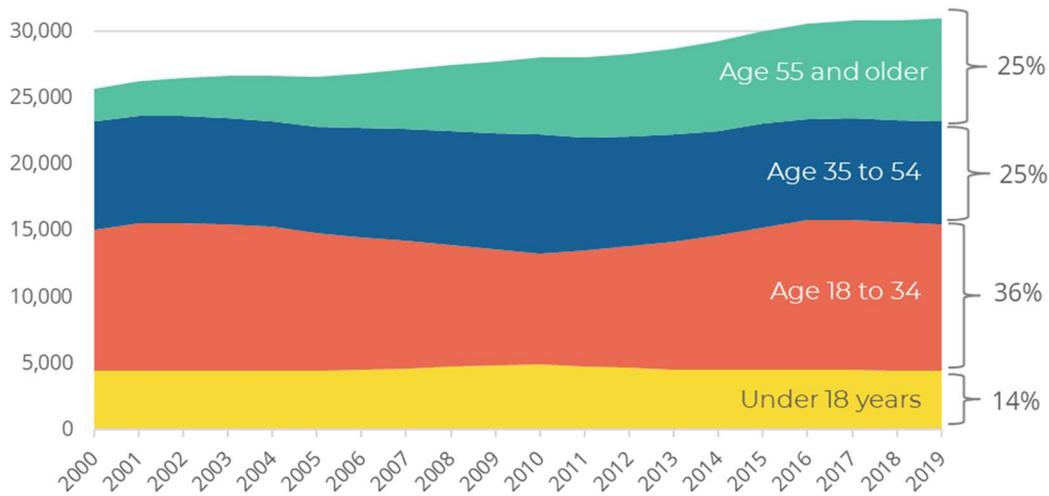
Source: Colorado Department of Local Affairs and Root Policy Research.

According to 2019 5-year American Community Survey (ACS) data, the City of Breckenridge has 4,938 residents, Silverthorne has 4,673 residents, and Frisco has 3,116 residents. The culmination of these three towns accounts for about 42% of the county’s total population.

In 2019, 40% of all housing units were occupied by permanent residents and 60% were “vacant.” Of these vacant, non-permanent resident households, 97% were for seasonal, recreational, or occasional use; 2% were currently for rent or for sale; and 1% were vacant for other reasons.¹

Age profile. The largest age cohort in Summit County is residents aged 18 to 34, accounting for 36% of the total population. This is a slight decrease since 2000 when the adults aged 18 to 34 accounted for 41% of the total population. The population aged 55 and older has increased from just 9% in 2000 to 25% in 2019. All other age groups declined as a percent of total population between 2000 and 2019, including the child cohort which was 17% in 2000 and 14% in 2019. Figure I-2 shows the change in population by age group in Summit County.

Figure I-2.
Population by Age in Summit County, 2000-2018



Source: Colorado Department of Local Affairs and Root Policy Research.

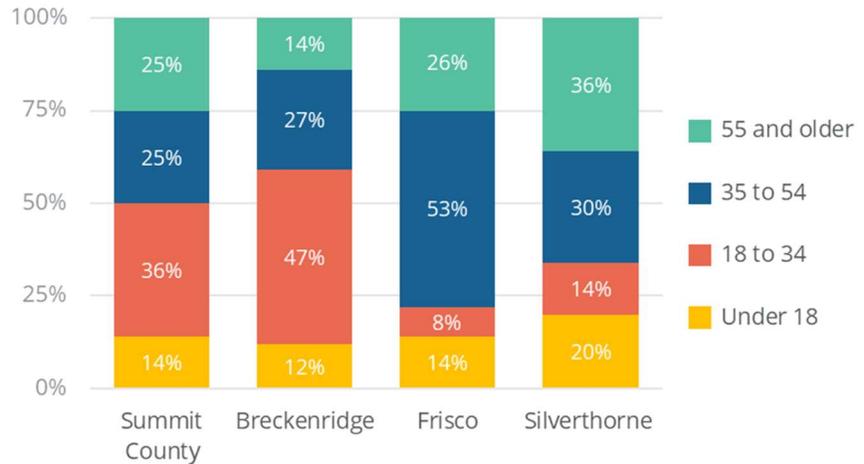
Twenty percent of the county’s population under age 5 live in Silverthorne, 11% live in Breckenridge, and 3% live in Frisco. Silverthorne is home to 19% of the county’s children (under 18 population) while 12% live in Breckenridge and 9% live in Frisco.

¹ Occupied and vacant units from Colorado Department of Local Affairs (DOLA); reasons for vacancy from 2019 5-year American Community Survey (ACS) data.

Figure I-3 compares the age distribution of the county overall with that of Breckenridge, Frisco, and Silverthorne. Breckenridge has a median age of 32, much lower than that of Silverthorne (46) and Frisco (48). However, Breckenridge also has a lower representation of children (just 12% of the population) while Frisco and Silverthorne have a higher representation of children, 14% and 20% respectively.

Figure I-3.
Age Distribution,
Communities in
Summit County

Source:
Colorado Department of Local
Affairs, 2019 5-year ACS and
Root Policy Research.



Presence of Children

As discussed above, the proportion of children living in Summit County declined between 2000 and 2020. However, the number of children in the county is predicted to increase over the next 30 years according to Colorado’s Department of Local Affairs (DOLA).

Figure I-4 shows the population of children (under 18) and the population of children under age six since 1990 and forecasts those populations from 2020 through 2050. Historical data are indicated by solid lines; forecasts are indicated by dashed lines. (Note that DOLA only provides forecasts at the county level).

Figure I-4.
Historic and
Forecasted
Population of
Children, Summit
County, 1990-2050

Source:
Colorado Department of Local
Affairs and Root Policy Research.

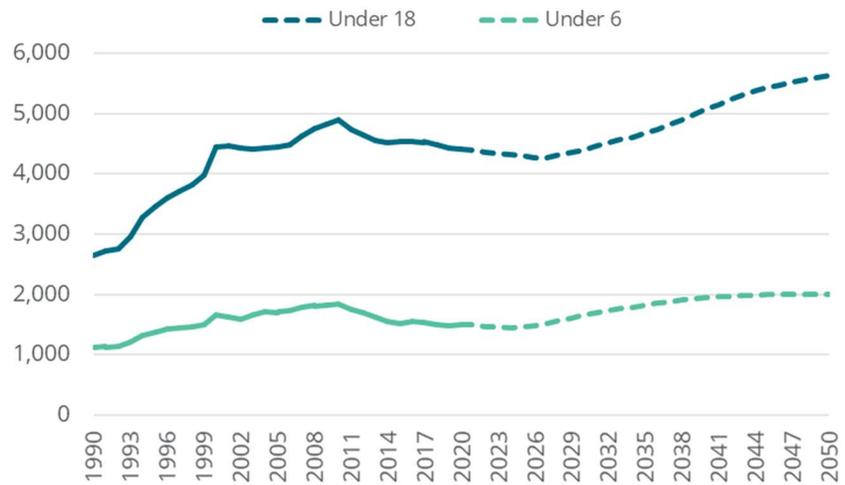
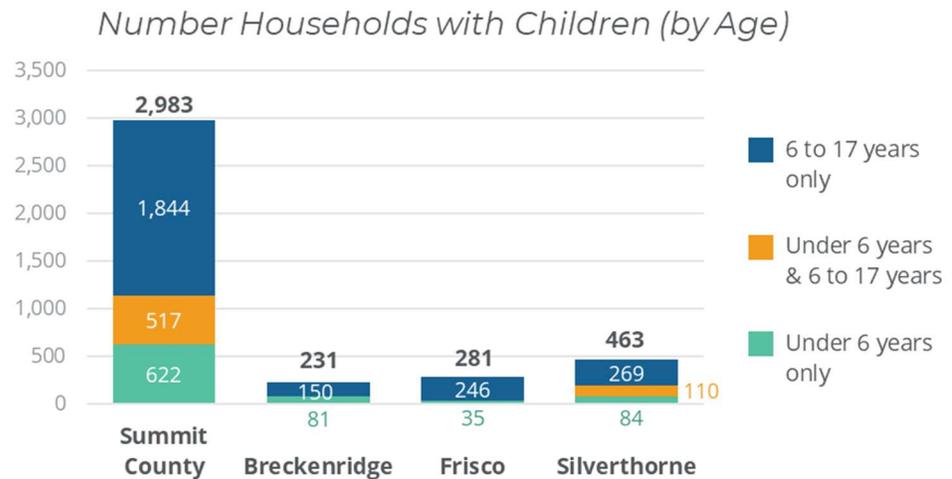
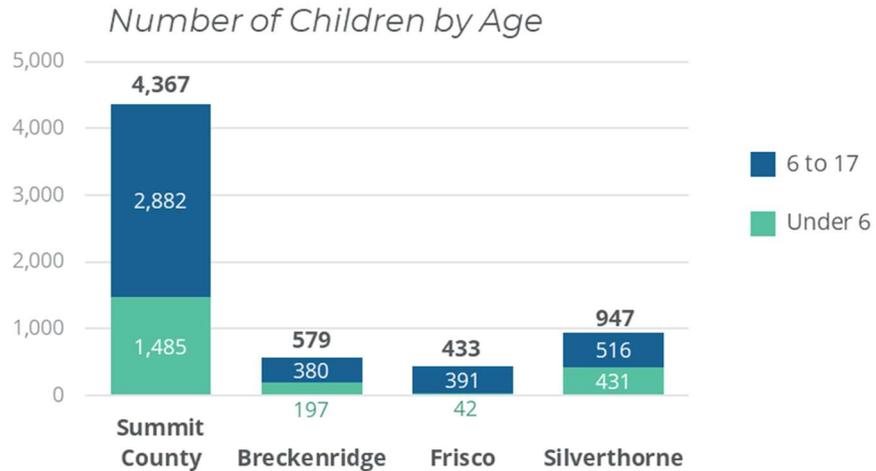


Figure I-5 shows the number of children by age in Summit County and its communities as well as the number of households with children (by age and community). As of 2020, about 23% of county households included children, representing 4,367 total children. Of those 1,485 are under 6 and 2,882 are school-aged (6-17).

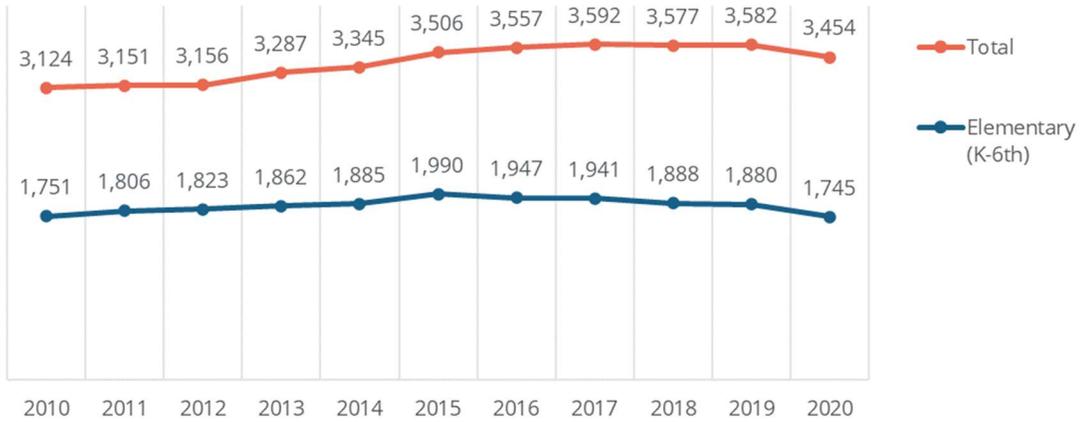
Figure I-5. Children in Summit County Population and Households

Source: DOLA population and household estimates and forecasts; 2010 and 2019 ACS; and Root Policy Research.



School enrollment. Figure I-6 displays total trends in school enrollment over the past 10 years in Summit County, both overall and in elementary grades (K through 6th). While enrollments decreased slightly between the 2019 and 2020 academic years, this may be largely explained by school withdrawals due to the COVID-19 pandemic (switching to homeschooling, private schools, etc.).

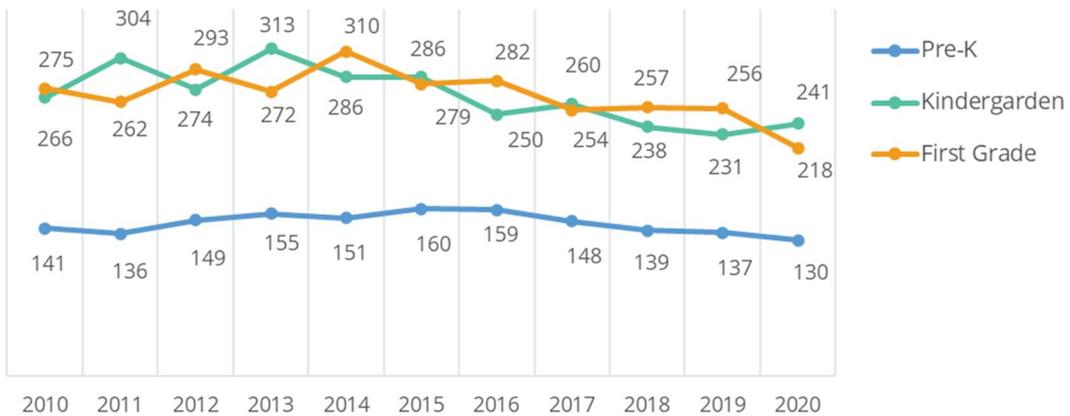
Figure I-6.
School Enrollment in Summit County



Source: Colorado Department of Education.

School district data also indicate an average of 268 children per year entering Kindergarten from 2010 to 2020. This would equate to about 1,609 children under the age of six living in Summit County, which serves as a useful verification of the DOLA estimate of 1,702 children between the ages of 0 and 6 living in Summit County.

Figure I-7.
School Enrollment in Summit County: Pre-K, Kinder, and 1st Grade



Source: Colorado Department of Education.

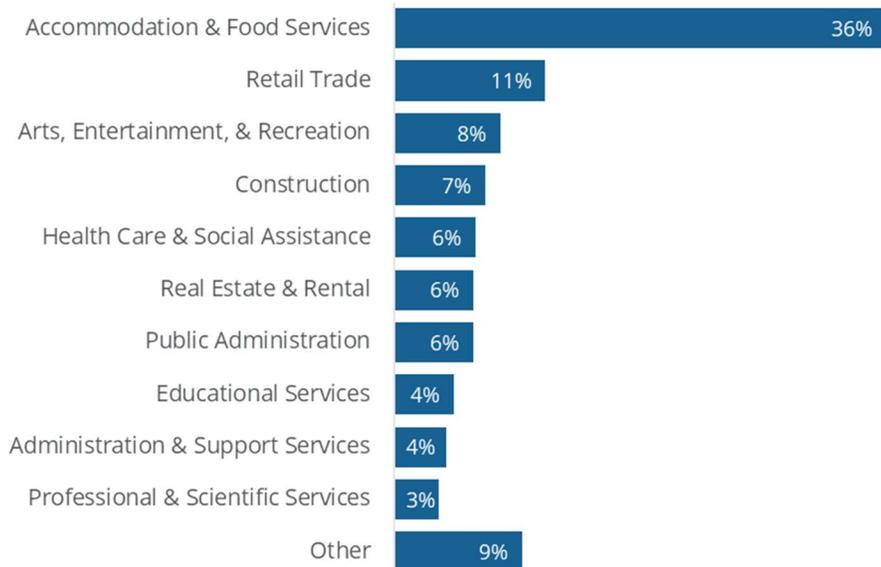
Employment Profile

The Census Bureau estimates that there are about 16,909 primary jobs in Summit County. The industries providing the most primary jobs in the county are accommodation and food service (36%), retail trade (11%), arts, entertainment and recreation (8%), and construction (7%). Most jobs in the county are concentrated along State Highway 9, US Route 6 and Interstate 70 in Breckenridge, Keystone, Silverthorne, and Frisco.

Industry distributions have an important impact on childcare needs, particularly when jobs are concentrated in industries with non-traditional working hours—as is the case in Summit County.

Figure I-8.
Primary Jobs
by Industry
in Summit
County

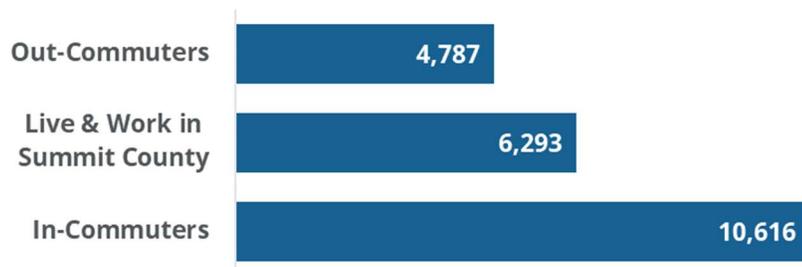
Source:
Longitudinal Employer
Housing Dynamics.



Commuting patterns. A slight majority of Summit County workers also live in Summit County, but there are still a high proportion of out-commuters as well as in-commuters, as shown in Figure I-9. Commuting patterns are particularly important for childcare demand as families and workers have different preferences about childcare proximity to home and work. These preferences are discussed in detail in Section II, Parent Preferences and Needs.

Figure I-9.
Inflow/Outflow
of Commuters
in Summit
County

Source:
2019 Longitudinal Employer
Housing Dynamics.

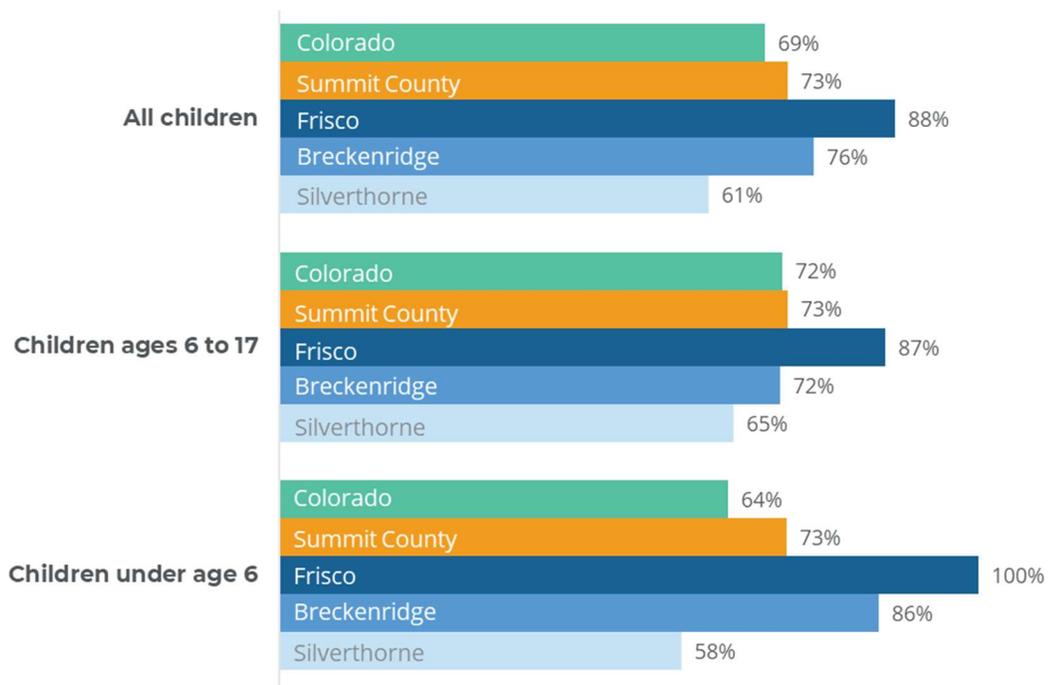


Children with parents in the labor force. Nearly three quarters (73%) of children in Summit County have all parents in their household in the labor force.² Rates are similar regardless of the age of children in the household and have stayed fairly consistent over time.

The proportion of children with all parents in the labor force in Summit County is higher than the state overall (69%) and that differential is greatest for young children, under age 6—73% in Summit vs 64% statewide.

Among Summit County communities, Frisco has the highest proportion of children with all parents in the labor force (88%) and Silverthorne has the lowest (61%).

Figure I-10.
Children with all parents in the labor force, 2019



Note: Considered all parents in the labor force if two parents in the labor force for those children living in two-parent households and one parent in the labor force for single parent households.

Source: 2019 5-year ACS data and Root Policy Research.

² Two parents in the labor force for those children living in two-parent households and one parent in the labor force for single parent households.

SECTION II.

CARE OPTIONS AND CAPACITY

SECTION II.

Care Options and Capacity

This section discusses existing childcare and after school care options and capacity in Summit County. It concludes with a discussion of the economic impact of childcare, based on academic literature statewide reports.

Early Childhood Childcare Capacity & Enrollment

Licensed childcare options in Summit county include childcare centers, public elementary early childhood education (ECE) programs, and licensed family childcare providers (those offering childcare services from their own homes). Collectively these options have capacity to serve 661 children per day:

- Eight licensed childcare centers with a collective capacity of 392 spots per day, account for 61% of the county's overall licensed childcare capacity. Five of these programs are in the Upper Blue Basin (Breckenridge Montessori, Carriage House Early Learning Center, Little Red School House, Open Arms Early Childhood Development Program, and Timberline Learning Center); two are located in Dillon (Lake Dillon Preschool and Rocky Mountain Montessori); and one is in Frisco (Summit County Preschool).
- Five elementary school ECE programs provided through Dillon Valley Elementary, Frisco Elementary, Silverthorne Elementary, Summit Cove Elementary, and Upper Blue Elementary have a collective daily capacity of 150 children (three- and four-year-olds only).
- Twelve licensed family childcare providers (also called "in-home daycare" or "family care providers" licensed to provide care for between six to twelve children in their own home) offer a collective capacity of 111 spots daily. Of the 12 providers, one is located in Breckenridge, four are in Dillon, two are in Frisco, and five are in Silverthorne.

Outside the structure of licensed childcare, families employ a number of strategies to provide care for their children including arranging work hours to accommodate care options, relying on friends, neighbors and family for care and using a nanny or participating in a nanny-share. Data on these options are not available, though their use in Summit County is evaluated through the parent survey, discussed in detail in Section III of this report.

Licensed capacity. Figure III-1 shows the licensed childcare options in Summit County by provider type. It includes the collective daily capacity by provider type along with the total number of children currently being served. Note that the number of individual

children actually served exceeds daily capacity because not all children are in care every day of the week. On average, children in licensed care attend 4.2 days per week.

At the time this data update was conducted, 726 children were accessing regular care in one of Summit County's licensed childcare programs. Overall, 18 percent of children in care are under the age of two. Licensed family childcare providers have the lowest overall capacity but the highest proportion of children under two years old.

Figure II-1.
Childcare Capacity and Enrollment, Summit County, 2022

| Provider Name | Total Daily Capacity | Number of Children Enrolled | Percent of Enrollment by Age | | | Provider Location |
|--|----------------------|-----------------------------|------------------------------|--------------------|--------------------|-------------------|
| | | | Infants (0-23 mos.) | Toddlers (2-3 yrs) | Preschool (4 yrs+) | |
| Child Care Centers | | | | | | |
| Breckenridge Montessori | 20 | 20 | 0% | 36% | 64% | Breckenridge |
| Carriage House Early Learning Center | 56 | 64 | 33% | 41% | 26% | Breckenridge |
| Lake Dillon Preschool (Zoomers) | 85 | 77 | 30% | 40% | 30% | Dillon |
| Little Red Schoolhouse- Breckenridge | 65 | 80 | 29% | 52% | 20% | Breckenridge |
| Open Arms Childcare and Preschool | 28 | 30 | 15% | 54% | 31% | Breckenridge |
| Rocky Mountain Montessori | 20 | 28 | 0% | 38% | 62% | Dillon |
| Summit County Preschool | 61 | 70 | 20% | 44% | 35% | Frisco |
| Timberline Learning Center | 65 | 68 | 28% | 43% | 29% | Breckenridge |
| Total Childcare Centers | 400 | 437 | 24% | 44% | 32% | |
| Public School ECE | | | | | | |
| Dillon Valley Elementary School | 30 | 27 | 0% | 0% | 100% | Dillon |
| Frisco Elementary School | 15 | 12 | 0% | 0% | 100% | Frisco |
| Silverthorne Elementary School | 45 | 40 | 0% | 0% | 100% | Silverthorne |
| Summit Cove Elementary School | 30 | 24 | 0% | 0% | 100% | Frisco |
| Upper Blue Elementary School | 30 | 27 | 0% | 0% | 100% | Breckenridge |
| Total Public School ECE | 150 | 130 | 0% | 0% | 100% | |
| Family Child Care Homes | | | | | | |
| Total for 12 Family Providers <i>(data presented collectively)</i> | 111 | 159 * | 32% | 44% | 24% | various |
| TOTAL - ALL PROVIDERS | 661 | 726 | 22% | 36% | 42% | |

Note: *Number of children in licensed family childcare homes is an estimate based on survey data; all other enrollment data obtained from Early Childhood Options. Where available we have substituted effective capacity for licensed capacity. Licensed capacity reflect state regulations; effective capacity reflects licensed capacity adjusted for operational realities including classroom allocation and staffing.

Source: Early Childhood Options, Colorado Licensed Child Care Facilities Report in the Colorado Information Marketplace, and Root Policy Research.

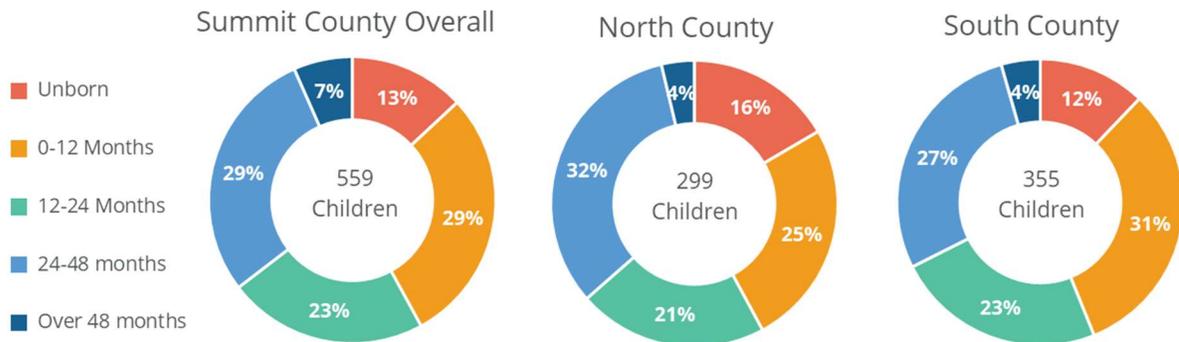
Waitlist. Early Childhood Options (ECO) maintains waitlist information for each center-based provider and then removes duplicates (waitlisted children who were on the list for more than one provider). According to data from ECO in 2018, there are 559 unduplicated

children on waitlists for care in Summit County—up from 345 in 2018. This indicates that demand for childcare is rising and is significantly higher than what existing providers can accommodate.

Figure II-2 displays the age profile of the current waitlist for the county overall as well as by location (North County vs South County). Note that some children may appear in both North and South County waitlists.

The age profile of the current waitlist for licensed childcare care skews heavily toward infants and unborn children. Indeed, 42% of children on waitlists for care in Summit County are wither unborn or younger than 12 months old. Another 23% are between 12 and 24 months old, 29% are between age two and four, and 7% are 4 years or older. The high proportion of infants and toddlers on the waitlist is a reflection of the broader childcare market, which has relatively low capacity for children under three years old.

Figure II-2.
Waitlist for Center-Based Childcare by Age



Note: Summit County list is unduplicated, though some children may appear in both North and South County waitlists.

Source: Early Childhood Options and Root Policy Research.

After-School Care Capacity

There are six primary operators of regular after-school programming in Summit County, all of which are either near capacity or have an active waitlist.

Four of the after-school providers either host programming on site at a Summit County elementary school or provide transportation to the site from Summit County elementary schools:

- Keystone Science School, which operates on-site after school programs at 3 elementary schools (Dillon Valley, Silverthorne, and Frisco Elementary);

- Frisco Fun Club, a function of the Town of Frisco which operates after-school programming at the Frisco Community Center (with occasional programming at the library and the Nordic Center) and provides transportation from Frisco Elementary;
- Breckenridge Mountain Camp, an after-school program at the Breckenridge Recreation Center with transportation from Breckenridge and Upper Blue elementary schools; and
- The Lake Dillon Theater Company, which provides a dual language after school theatre program on site at Silverthorne Elementary.

In addition, there are two providers which offer after-school care but do not provide on-site services or transportation from elementary schools. These include:

- Mountain Top Children’s Museum; and
- Lake Dillon Preschool.

The total daily capacity of the programs outlined above (and shown in Figure II-3) is 265-285. The range reflects additional programming on Mondays and Thursdays as part of the Little Vikings program in Frisco.

Figure II-3.
After-School Care Options for Elementary School Children

| Program Name/Operator | Location | Daily Capacity | Program and Transportation Description |
|-------------------------------------|---|----------------|---|
| Keystone Science School | Dillon Valley Elementary | 20 | After School Program - on site |
| Keystone Science School | Silverthorne Elementary | 20 | After School Program - on site |
| Keystone Science School | Frisco Elementary | 20 | After School Program - on site |
| Frisco Fun Club (Town of Frisco) | Frisco Community Center | 20-40 | - Program varies by day (library, yoga, SNO, Art) - Little Vikings program adds 20 spots on Mon and Thurs - Transportation from Frisco Elementary |
| Mountain Top Children's Museum | Mountain Top Children's Museum (Breckenridge) | 45 | After School Program |
| Breckenridge Mountain Camp | Breckenridge Recreation Center | 100 | After School Program; transportation provided from Breckenridge Elementary and Upper Blue |
| Lake Dillon Preschool | Lake Dillon Preschool | 20 | School Age Camp |
| The Lake Dillon Theater Co. | Silverthorne Elementary | 20 | Dual Language After School Theatre Arts Program - on site |
| Total Daily Capacity | | 265-285 | |

Note: Programs generally serve K-5th grades, or ages 5-13.

Source: Colorado Licensed Child Care Facilities Report in the Colorado Information Marketplace, www.1degree.org, and Root Policy Research.

In addition to the options listed above, there are a number of extra-curricular activity options which offer one- or two-days per week of focused activities (i.e., specific sports teams, arts, dance, etc.) but do not serve the same childcare oriented purpose as those above. Participation in such activities is discussed in more detail in the parent survey, Section III of this report.

Economic Impact of Childcare

The positive impacts of early childhood education/childcare are well-documented in prevailing academic research. These impacts include individual benefits for the child and family as well as economic and social benefits realized by the broader community.

Child development. Academic studies highlight the need for early intervention to support identified benefits based on the pace of brain development from birth through age six and the early development of noncognitive skills such as motivation, self-control, and time preference.¹ The research is clear that the types of early experiences that help children thrive include “stable and nurturing relationships with caregivers, language-rich environments, and encouragement to explore through movement and senses;” while the types of experiences that negatively impact development include “poverty; exposure to violence, abuse or neglect; and an incarcerated or mentally ill parent.”² Toxic stress, caused by these adverse experiences, has an immediate impact on children’s ability to learn and self-regulate but also has long-term mental and physical health impacts.³

In response to psychological, behavioral, and economic research on this issue, early childhood development programs are designed to create supportive environments and help foster healthy development from the earliest years. According to research from the Minneapolis Federal Reserve, “programs that offer enriched experiences for children and involve parents and other caregivers provide benefits for all children but have the strongest impact on children from disadvantaged environments.”⁴ Public health experts

¹ Douglas Clement, “Interview with James Heckman” The Region, Federal Reserve Bank of Minneapolis, 2005. Available online at www.minneapolisfed.org/publications/the-region/interview-with-james-heckman

² Rob Grunewald, “Investments in Young Children Yield High Public Returns,” Federal Reserve Bank of Minneapolis, 2016. Available at www.philadelphiafed.org/community-development/publications/cascade/93/04_investments-in-young-children

³ Maxia Dong, Wayne H. Giles, Vincent J. Felitti, et al. “Insights into Causal Pathways for Ischemic Heart Disease: Adverse Childhood Experiences Study,” *Circulation*, 2004, 110(13). Available at <http://circ.ahajournals.org/content/110/13/1761.full>.

⁴ Rob Grunewald, “Investments in Young Children Yield High Public Returns,” Federal Reserve Bank of Minneapolis, 2016. Available at www.philadelphiafed.org/community-development/publications/cascade/93/04_investments-in-young-children

have pointed out how Colorado childcare providers have prioritized children’s wellbeing in ways which set them up for social and economic success in the future⁵.

Economic gains. The most prominent studies of early childhood education impacts are based on the Perry Preschool Project in Michigan (ages 3–4 years), the Chicago Child-Parent Centers program (ages 3–4 years), the Carolina Abecedarian Project in North Carolina (ages 3 months through 4 years), and the Prenatal/Early Infancy Project in Elmira, NY (prenatal to age 2 years). These studies document the individual gains (both immediate and persistent) and the community benefits resulting from the provision of high-quality early learning programs—particularly those targeted to children from disadvantaged environments.⁶

- Individual economic benefits found in these studies include higher school achievement, educational attainment, and earnings along with health improvements such as reductions in smoking rates, heart disease and diabetes.⁷
- Societal economic benefits documented in these studies include reduced societal costs (e.g., reduced incarceration rates and reduced need for special education resources), increased tax revenue, increased labor force productivity, and higher labor force engagement among parents.⁸
- Benefit-cost ratios from the projects described above range from \$4 to \$16 returned for every dollar invested—and the public benefits measured were higher than the private benefits.

Prevailing academic literature shows the full economic impact of early childhood education to range from \$4 to \$16 for every \$1 invested—that equates to a 400% to 1,600% return.

Economic cost of insufficient childcare. Other studies have shown that inadequate access to childcare constrains local economic activity. For example, many scholars have found that presence of young children in the household reduces women’s likelihood of labor force participation, but a 2019 study found that this can be mitigated by

⁵ Eyer, Amy A., et al. "Adherence to Updated Childcare Nutrition Regulations in Colorado, United States." *Frontiers in public health* 8 (2020): 102.

⁶ Ibid. and James J. Heckman, Rob Grunewald, and Arthur J. Reynolds, "The Dollars and Cents of Investing Early: Cost-Benefit Analysis in Early Care and Education," *Zero to Three*, July 2006, 26(6).

⁷ Karen Shellenback. "Child Care and Parent Productivity: Making the Business Case," *Linking Economic Development & Child Care Research Project*, Cornell University, 2004.

⁸ Rob Grunewald, "Investments in Young Children Yield High Public Returns," Federal Reserve Bank of Minneapolis, 2016. Available at www.philadelphiafed.org/community-development/publications/cascade/93/04_investments-in-young-children

childcare availability.⁹ Others have found that parent absenteeism and productivity reductions due to childcare breakdowns cost U.S. businesses more than \$3 billion annually.¹⁰

Recent literature has found that mothers who moved to states with higher-than-average childcare costs had odds of employment that were 18% lower than mothers moving to states with average or less-than-average care costs. Colorado was one of 21 states with higher-than-average care costs in this study.¹¹

In fact, Colorado is one of the top ten least affordable states for infant and four-year-old care. The cost of center-based infant care is more than 40% higher in Colorado than nationally, while the cost of home-based infant care is nearly 30% higher than the national

“The economic impacts of insufficient childcare on Colorado parents, employers, and taxpayers totals

\$2.17 billion

in annual costs to our state” – 2020 *Ready Nation report: Want to Grow Colorado’s Economy? Fix the Child Care Crisis*

average. The cost of care for a 4- year-old in either home- or center-based care is 26% higher in Colorado than it is nationally. The average cost of childcare statewide is 31% of the average income, meaning childcare is unaffordable for many families.¹²

Research has shown that productivity losses due to inability to find childcare have caused Colorado employers to lose an estimated \$680 million annually. Similarly, when parents earn less, they pay less in state taxes: an estimated \$420 in Colorado tax revenue is lost per parent due to childcare challenges.¹³

⁹ Conroy, Tessa. "The kids are alright: working women, schedule flexibility and childcare." *Regional Studies* 53.2 (2019): 261-271.

¹⁰ Rob Grunewald, "Investments in Young Children Yield High Public Returns," Federal Reserve Bank of Minneapolis, 2016. Available at www.philadelphiafed.org/community-development/publications/cascade/93/04_investments-in-young-children

¹¹ Landivar, Liana Christin, Leah Ruppner, and William J. Scarborough. "Are States Created Equal? Moving to a State With More Expensive Childcare Reduces Mothers' Odds of Employment." *Demography* 58.2 (2021): 451-470.

¹² Butler Institute for Families and Brodsky Research and Consulting, "Bearing the Cost of Early Care and Education in Colorado: An Economic Analysis," Prepared for Early Milestones Colorado, 2017. Available online at <https://earlymilestones.org/wp-content/uploads/2020/01/Bearing-the-Cost-of-ECE-in-Colorado.pdf>

¹³ Bishop-Josef, Sandra, Cook, Michael, and Garrett, Tom, "Want to Grow Colorado's Economy? Fix the Child Care Crisis," Prepared for Ready Nation & Council for Strong America, March 2020. Available online at <https://strongnation.s3.amazonaws.com/documents/1120/f40c30b2-32e4-4197-97bf-cb2b8c6fd8d4.pdf?1589292162&inline;filename=%22Want%20to%20Grow%20Colorado%E2%80%99s%20Economy%20Fix%20the%20Child%20Care%20Crisis.pdf%22>

Economic impact of Colorado’s childcare industry. A 2017 report on the Economic Impact of Child Care in Colorado classifies the economic impacts in Colorado as follows:

- The *immediate* economic effect in which spending on childcare services contributes to state/local employment and economic output (**\$619 million in earnings and \$1.4 billion in sales/services**);
- The *enabling* economic effect, in which the provision of childcare allows parents to participate in the workforce (**\$4.4 billion**); and
- The *investment* effect, in which childcare spending generates individual and community returns derived from higher lifetime incomes, lower incarceration rates, lower welfare expenditures, and improved worker productivity (**\$832 million annually in Colorado**).¹⁴

“The early care and education sector is a key driver for the state’s economy... It adds \$2.25 to the state economy for every dollar of services purchased in the industry, enables parents to participate in the state’s workforce, generating \$4.4 billion in earnings annually... [and] adds an additional \$832 million into the state economy in short- and long-term benefits.” –*Bearing the Cost of ECE in Colorado*

expenditures, and improved worker productivity (**\$832 million annually in Colorado**).¹⁴

While these data are not available at the local level, Summit County certainly experiences the same types of benefits on a proportional scale.

¹⁴ Butler Institute for Families and Brodsky Research and Consulting, “Bearing the Cost of Early Care and Education in Colorado: An Economic Analysis,” Prepared for Early Milestones Colorado, 2017. Available online at <https://earlymilestones.org/wp-content/uploads/2020/01/Bearing-the-Cost-of-ECE-in-Colorado.pdf>

SECTION III.

PARENT/GUARDIAN PERSPECTIVES

SECTION III.

Parent Preferences & Needs

This section presents results from Summit County Childcare Needs Survey of parents and guardians (Parent Survey) and examines:

- Current childcare choices;
- Childcare preferences and needs, including parent-only care and friend/family care;
- The cost of childcare; and
- Before/after school care needs for children 6 to 12 years old.

Survey Methodology

Surveys were available online and in paper form in both English and Spanish and outreach efforts targeted households that have children too young for school or school-aged children under age 12, regardless of whether they utilize paid childcare or afterschool activities. The survey was open to anyone interested in participating, which means the results are based on non-probability sampling methods. Specifically, responses were derived from convenience sampling and snowball sampling methods. Convenience sampling refers to promoting the survey to known individuals or organizations through direct contact (e.g., email invitation) or public relations and social media. Snowball sampling is when a respondent to the survey promotes the survey to their peers or social networks (e.g., sharing the survey link by email or social media).

Root monitored the survey as it progressed and compared demographic and socioeconomic indicators with the overall population and continually worked with the committee to adjust outreach efforts as necessary to make sure we were reaching all segments of the potential user population.

The survey received 528 respondents, representing 486 children aged six and younger who are not yet in kindergarten, and 405 children who are in school but under age 12. Socioeconomic characteristics of respondents are discussed in more detail in the following section but broadly speaking, respondents characteristics were similar to County residents overall. The respondent numbers indicate over one-quarter of children in those age groups were represented in the survey (29% of all children under 6 and 26% of all children 6-11).

The survey was open to respondents during the months of October through December (2021). While some parents/guardians may have shifted their childcare usage during the COVID-19 pandemic, the survey instrument was carefully designed to ask respondents about non-COVID,

or “typical” childcare experiences. As such, the results are intended to inform childcare preferences and needs in a non-pandemic environment.

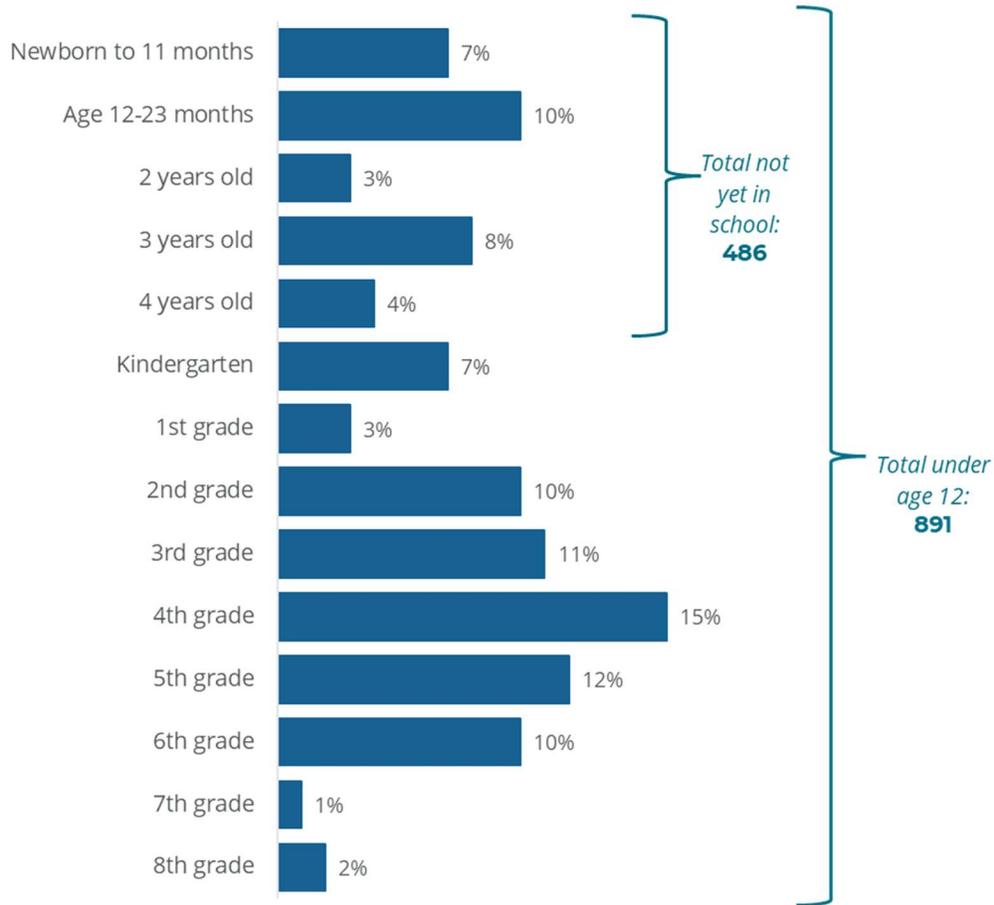
Profile of Participating Parents

A total of 528 parents (or soon-to-be parents) with children under age 12 living or working in Summit County responded to the Parent Survey.

- Most respondents live in Breckenridge (26%), Silverthorne (24%), or Frisco (13%). Another 11% of respondents live in Summit Cove and the remainder live in Dillon Valley (6%), Dillon (5%), Keystone (4%), Blue River (3%), Copper Mountain (1%), or Montezuma (1%). About 3% of respondents live elsewhere within Summit County.
- A small group of respondents (4%) live in neighboring counties but work in Summit County (i.e., in-commuters).
- Overall, 72% of respondents have children who are too young for school (under age 6 and not in kindergarten) and 57% have a child in school under the age of 12. An additional 4% of respondents do not yet have children, but are planning to have, adopt, or gain custody of a child under age 12 in the next 12 months. The average household size of survey respondents is 3.7 members, with respondents most commonly living in households of three (37%) or four (42%) members.
- On average, respondents’ household income is about \$102,500, slightly higher than the County’s median household income reported in the ACS (\$79,277). In fact, 56% of respondents had household incomes higher of \$100,000 or more.
- Among survey respondents who disclosed their ethnicity, 78% identified as White and 21% identified as Hispanic. Hispanic representation in the survey is very similar to the overall representation of Hispanic ethnicity among all families with children in Summit County (25%).

Children represented. A total of 486 children aged six and younger who are not yet in kindergarten live in the households represented by Parent Survey respondents. Another 405 children aged 6 to 12 are also represented by survey respondents. The respondent numbers indicate over one-quarter of children in those age groups were represented in the survey (29% of all children under 6 and 26% of all children 6-11).

Figure III-1.
Number of Children by Age, Living in Survey Respondent Households



Note: n=528 parent respondents.

Source: Root Policy Research from the 2021 Summit County Childcare Needs Survey.

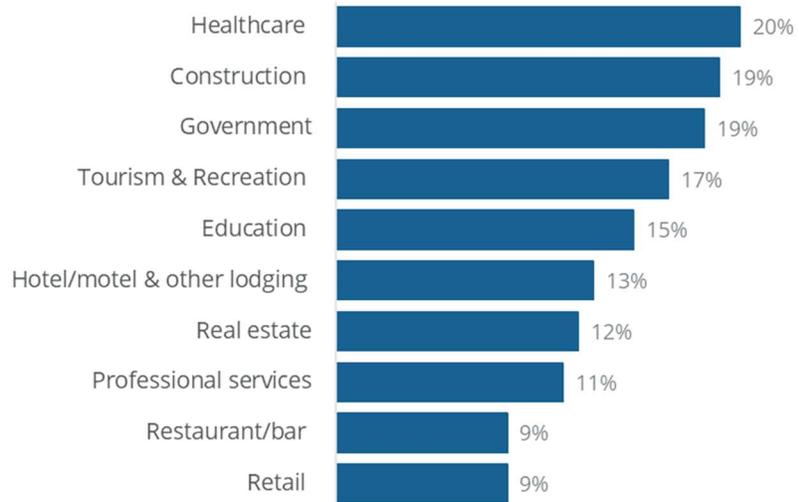
Employment. Just 16% of Parent Survey households have at least one adult in the home who is not in the labor force. In the remaining 84% of households, all adults in the home are engaged in paid work.

Respondents work in a wide variety of businesses and industries. Figure III-2 presents the top 10 business/industries where parents of young children are employed in Summit County. Nearly one fifth of households have a member working in healthcare and similar proportions include an adult working in government, construction, or tourism and recreation. Such industries tend to have atypical work schedules and thus present unique childcare challenges.

Figure III-2.
Top 10 Businesses or Industries of Parents

Note:
 n=394 households. Total sums to more than 100% because households may contain multiple working adults (in multiple industries).

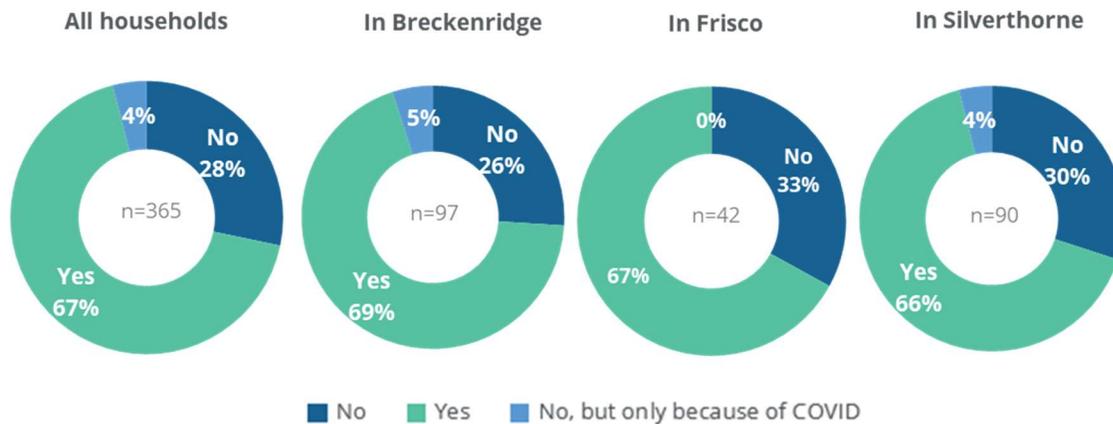
Source:
 Root Policy Research from the 2021 Summit County Childcare Needs Survey.



Childcare for Children Too Young for School

Current childcare choices. Overall, 67% of survey respondents with children under 6 regularly use some form of non-parent childcare and an additional 4% indicated they typically use non-parent childcare but currently do not only because of the COVID-19 pandemic. Proportions are similar across Summit County communities, as shown in Figure III-3.

Figure III-3.
Are any of your children aged six or under regularly in any type of childcare or preschool programs provided by someone other than their parent or guardian? [This does not include occasional babysitting].

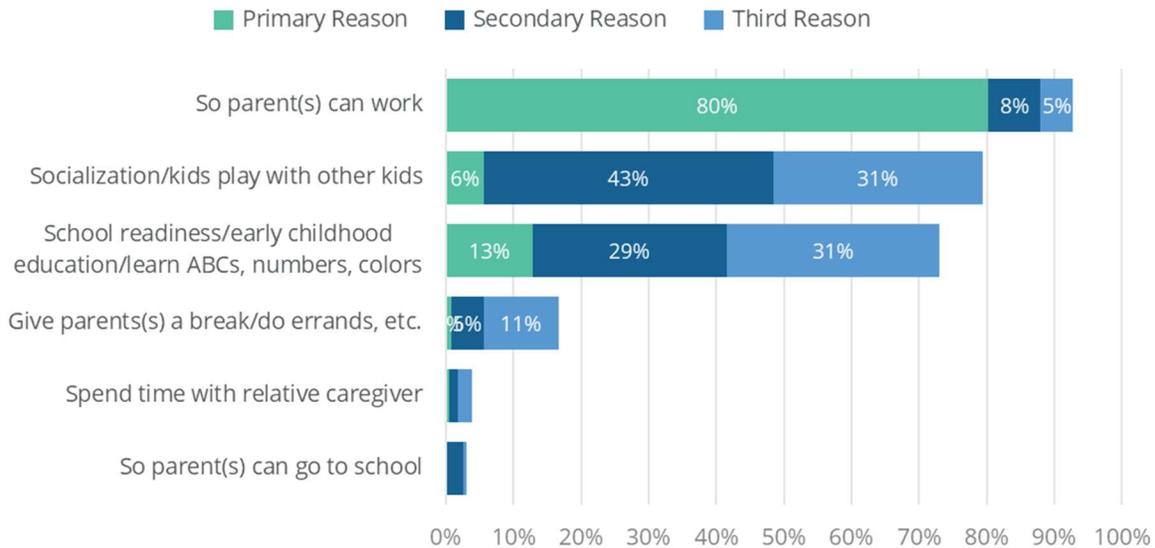


Note: n=365 parent respondents.

Source: Root Policy Research from the 2021 Summit County Childcare Needs Survey.

The primary reason most parents (80%) use non-parent childcare is so that one or both parents can work (see Figure III-4). Socialization is the second most common reason for non-parent childcare followed by school readiness/early childhood education.

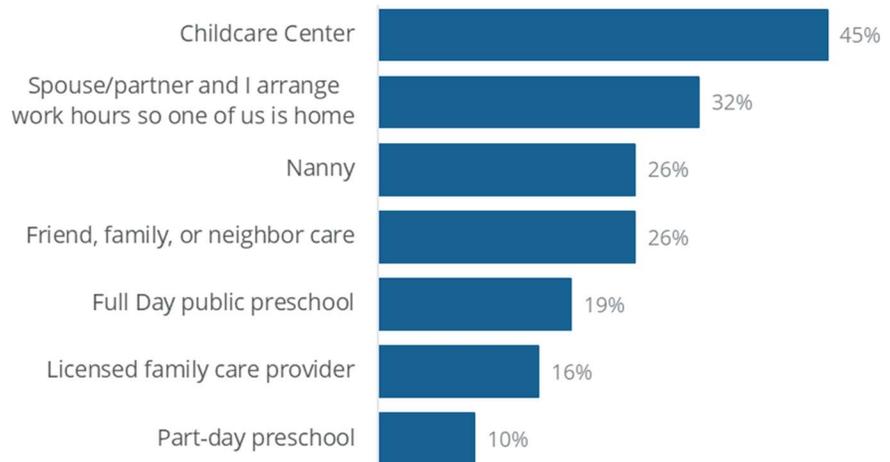
Figure III-4.
What are the primary reasons that your child/children is/are in childcare?



Note: n=233 parent respondents.
 Source: Root Policy Research from the 2021 Summit County Childcare Needs Survey.

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 to the forms of care listed above, one-third (32%) of childcare involves parents arranging their schedules or stay home with children part-time.

Figure III-5.
Types of Childcare Utilized Weekly by Children Under 6 in Non-Parent Care



Source:
 Root Policy Research from the 2021 Summit County Childcare Needs Survey.

Note that the sum of these percentages is over 100 percent, which shows that 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.

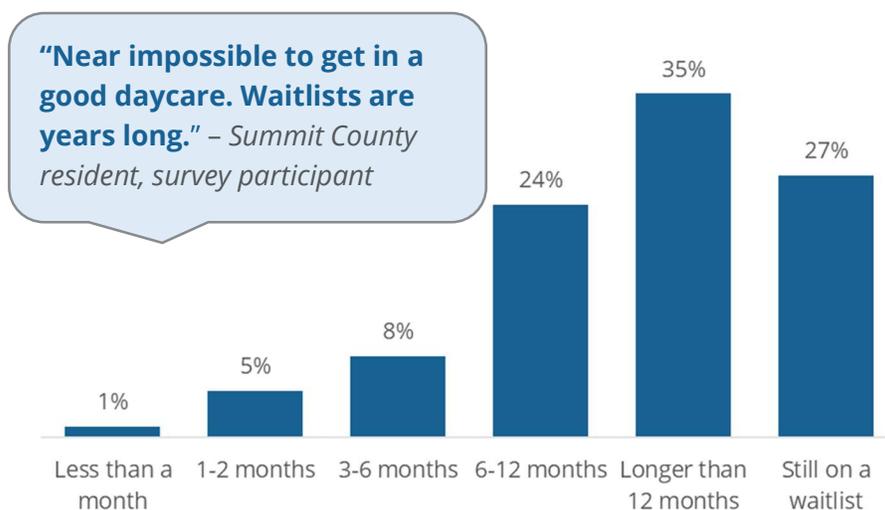
Households with infants are involving even more care coordination, using 2.4 different types of care on average. Infant households are also much more likely use close family friends or neighbors and arrange work shifts for their children’s care compared to households with toddlers or preschoolers.

Waitlist experience. Overall, 73% of Summit County parents with young children were on a waitlist for one or more of their children. Most respondents (59%) were on a waitlist for longer than 6 months and many respondents (27%) indicated they are still on a waitlist.

Figure III-6.
How long were you on the waitlist?

Note:
n=168 parent respondents.

Source:
Root Policy Research from the 2021 Summit County Childcare Needs Survey.



Satisfaction with non-parent childcare. Parents of young children using some type of non-parent childcare rated their satisfaction with childcare on a scale from “extremely unsatisfied” (rating of 0) to “extremely satisfied” (rating of 9). Figure III-7 considers parent satisfaction with their childcare overall as well as by types of care used by the household and ages of children in the household.

Overall, Summit County parents that use non-parent childcare for children aged six or younger are relatively satisfied with the care: 73% rated their satisfaction between seven and nine. Just 5% indicated they were unsatisfied with a rating of zero through three. The average satisfaction rating overall was a 7.4 (on a 9-scale).

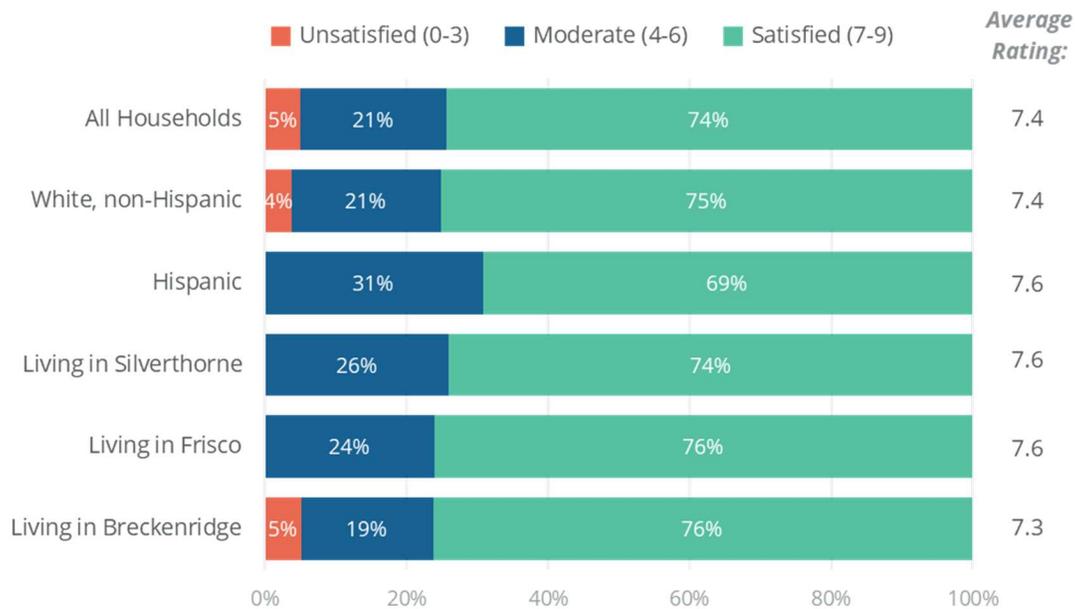
Average satisfaction ratings varied somewhat by residence, with those in Breckenridge slightly less

“I would [like to] be able to find daycare for both of my kids and not just one. One is still on every waitlist. It has been 18 months.” – Summit County resident, survey participant

satisfied than those living in Silverthorne or Frisco. Hispanic residents, on average, were also slightly more satisfied than White, non-Hispanic residents.

Figure III-7.

On a scale from 0 to 9, where 0 is “Extremely Unsatisfied” and 9 is “Extremely Satisfied,” how satisfied are you with the childcare provided to your children?



Note: n=219 parent respondents.

Source: Root Policy Research from the 2021 Summit County Childcare Needs Survey.

The respondents that were “unsatisfied” with their childcare cited a variety of reasons including scheduling, limited choice, high cost, and poor quality of care.

Family/friend/neighbor care. Among parents who indicated their young children are cared for by a family member, friend, or neighbor, grandmothers (67%), grandfathers (33%), aunts (21%), and non-relative family friends/neighbors (33%) comprise the majority of FFN childcare providers used by Summit County households.¹ The most common *primary* reasons for choosing family, friend, or neighbor care were:

- I trust this person (33%);
- I want someone I know to take care of my child (33%); and
- It was the only option available (17%).²

¹ Percentages add to more than 100% because households use multiple friends/family providers for childcare.

² Another 17% listed COVID as a primary, albeit temporary, reason.

Secondary reasons included being on a waitlist for licensed care, proximity to home, affordability, and spending quality time with the caregiver.

When asked what types of training or child development education they wished their friend/family provider had, the greatest proportion of households identified CPR/first aid (83%), followed by nutrition (50%), child development (50%), and health and safety training (50%). When asked if they thought their friend/family caregiver would take up this training if offered, 40% said yes. Others were not sure (20%) or said they would not participate in training (40%).

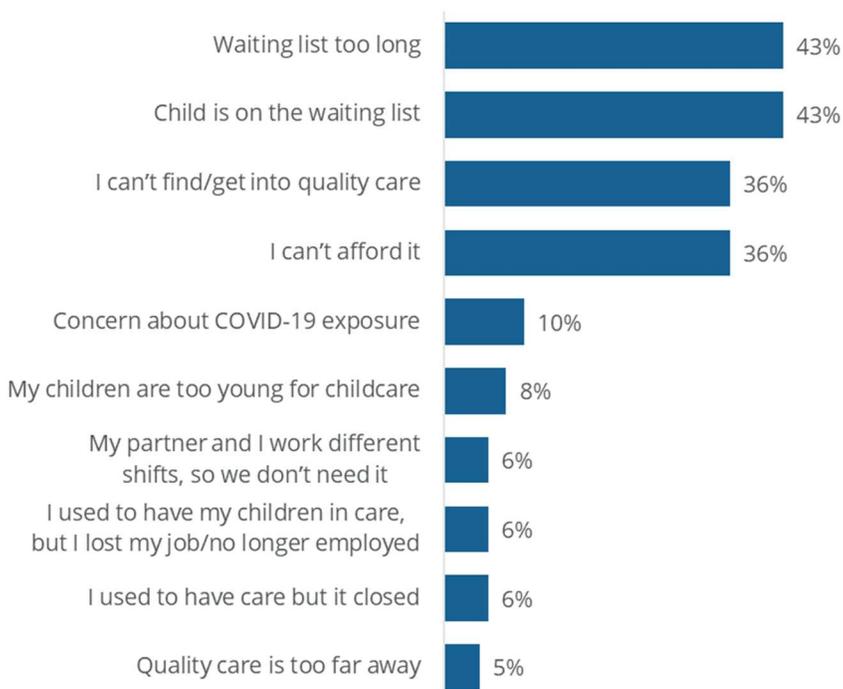
Parent-only care. A little over a quarter (28%) of Summit County parents with children still too young for school do not regularly use non-parent childcare providers. Among those households, **the vast majority (91%) said they would prefer to use childcare if there were an affordable, high-quality option available.**

As shown in Figure III-8, the most common reason why these households do not have someone else regularly watch their children is because the waitlist is too long or their child is still on the waitlist (43%). Other top reasons were “I can’t find/get into quality care” (36%) and I can’t afford it (36%).

Figure III-8.
What is the primary reason why you do not have someone else regularly care for your children age 6 or younger?

Note:
 n=88 households. “Other” responses included not having children yet or being undocumented.

Source:
 Root Policy Research from the 2021 Summit County Childcare Needs Survey.



The survey also asked parents of young children what type of care arrangement would work best if they needed care. The most common preference for children under three was a childcare center or public preschool (49%) followed by Head Start (11%), licensed family care provider (8%), or a nanny providing care in their home (8%).

Childcare preferences and needs. Parents with a young child in some type of non-parent childcare responded to a number of questions related to their childcare preferences, including important factors in choosing a provider and desire to change childcare arrangements. They also provided information on their preferred location, types of care, and schedule.

Important factors. Parents with a young child in some type of non-parent childcare rated the importance of 17 factors in their decision to select a childcare provider. These factors range from trust and safety to child development opportunities.

Figure III-9 shows the average rating of each factor among all households using non-parent care and by race/ethnicity of respondent and household income. The top three factors for each category are highlighted in green.

On average, parents rate factors associated with childhood development and education, provider values, and socialization for children as the most important factors.

These factors vary somewhat by race and ethnicity. Compared to White, non-Hispanic respondents, Hispanic respondents view reputation/referrals and affordability/cost as more important. They are also more likely to value providers' speaking a language other than English, and providers that can accommodate their child's special needs or disability.

As expected, lower-income households (those making less than \$50,000 annually) are more concerned about affordability and cost than higher-income households. They are also more likely to value providers who can accommodate their child's special needs or disability and slightly less likely to value having a licensed provider.

Figure III-9.

Think about the factors you considered when you were evaluating different childcare providers for your child/children. Please rate the importance of each of the following factors on a scale from 0 to 9, where 0 means not important at all and 9 means very important.

| | All Households using Non-Parent Care | Race/ethnicity | | Income level | |
|--|--------------------------------------|---------------------|----------|--------------------|------------------|
| | | White, non-Hispanic | Hispanic | Less than \$50,000 | \$50,000 or more |
| | | | | | |
| Wanted emphasis on child development/education | 8.1 | 8.1 | 8.1 | 8.0 | 8.1 |
| Values/is comfortable with this provider | 7.9 | 7.9 | 8.5 | 8.5 | 7.8 |
| Socialization for child | 7.9 | 8.0 | 8.1 | 8.1 | 7.9 |
| Location/convenience (e.g. close to home or work) | 7.7 | 7.8 | 8.2 | 7.7 | 7.7 |
| Reputation/referrals | 7.5 | 7.4 | 8.5 | 7.9 | 7.5 |
| Wanted a licensed provider | 7.4 | 7.5 | 7.3 | 6.9 | 7.4 |
| Affordability/cost | 7.1 | 6.8 | 8.4 | 8.0 | 6.9 |
| Hours of operation | 7.0 | 6.8 | 8.2 | 7.5 | 6.9 |
| Only type available/nothing else available | 6.3 | 6.6 | 6.1 | 6.0 | 6.5 |
| Provider accepts CCCAP or other tuition assistance | 5.3 | 4.9 | 6.4 | 6.2 | 5.0 |
| My other children are already with this provider/went to this provider | 5.3 | 5.1 | 5.6 | 4.1 | 5.4 |
| They were able to accommodate my child's special needs/disability | 4.6 | 3.1 | 7.7 | 6.9 | 3.2 |
| Wanted a family/home environment | 4.1 | 3.4 | 7.1 | 6.9 | 3.7 |
| Wanted more than one adult with child | 3.8 | 3.4 | 5.7 | 4.7 | 3.7 |
| They speak a language other than English | 3.2 | 2.6 | 6.2 | 5.6 | 2.8 |
| Wanted one-on-one care | 2.6 | 1.9 | 5.7 | 5.1 | 2.3 |
| Wanted child to be cared for by a relative, friend, or neighbor | 2.4 | 1.7 | 5.5 | 5.8 | 1.9 |

Note: n=226 parent respondents.

Source: Root Policy Research from the 2021 Summit County Childcare Needs Survey.

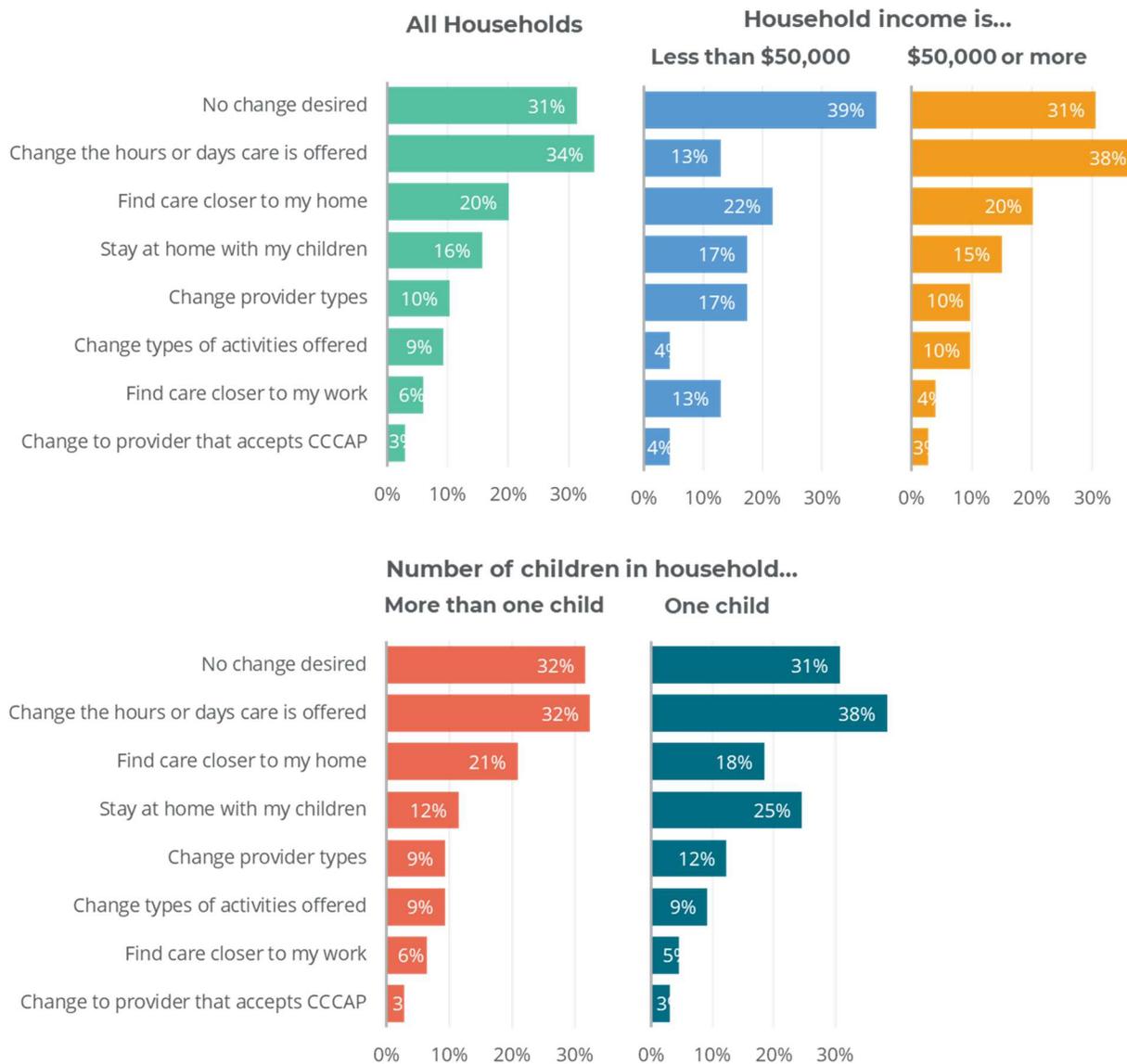
Desire to change childcare arrangements. Overall, 69% of Summit County parents of children who are not yet in kindergarten would change something about their current childcare/preschool arrangement if they could. The changes respondents indicated they would like to make are shown in Figure III-10.

The most common aspects respondents said they wanted to change were the hours or days care is offered, followed by finding care closer to home. Note that percentages do not sum to 100 because respondents could select more than one desired change.

“There is a lack of selection for licensed childcare facilities. I would like to be able to choose a facility rather than having to pick the only one close by.” – Summit County resident, survey participant

Households with more than one child are more likely to want care closer to their homes than those with just one child. However, those with just one child are more likely to desire staying home with their children. Low-income households are much more likely than higher-income households to desire care closer to their work.

Figure III-10.
If you could change your childcare arrangements, would you....



Note: n=204 parent respondents.

Source: Root Policy Research from the 2021 Summit County Childcare Needs Survey.

Hours and days of week care is needed, but not provided. Only about one-third (35%) of households with young children have access to childcare during all hours and days of week needed. Figure III-11 presents the additional hours and days of week needed by the type of care used by the household.

Among all household with children too young for kindergarten, 24% need childcare on additional weekdays, but their provider is currently full. Many (23%) also need care earlier in the morning than currently offered and 21% need weekend hours. About 14% of parents expressed a need for summer care and 11% expressed a need for hourly drop-in care.

Households with at least one member working in healthcare, restaurant/bar, or tourism and recreation were more likely to need weekend, evening, and earlier morning care compared to the general population.

Low-income households (those making less than \$50,000 per year) were more likely to need weekend, evening, overnight, and drop-in care compared to the general population. Households with more than one child were more likely to desire earlier morning hours than households with just one child. They were also much more likely to need drop-in care and summer care.

Figure III-11.

Are there hours and/or days that you need childcare for children six or under to accommodate household members' work schedule and it is not provided?

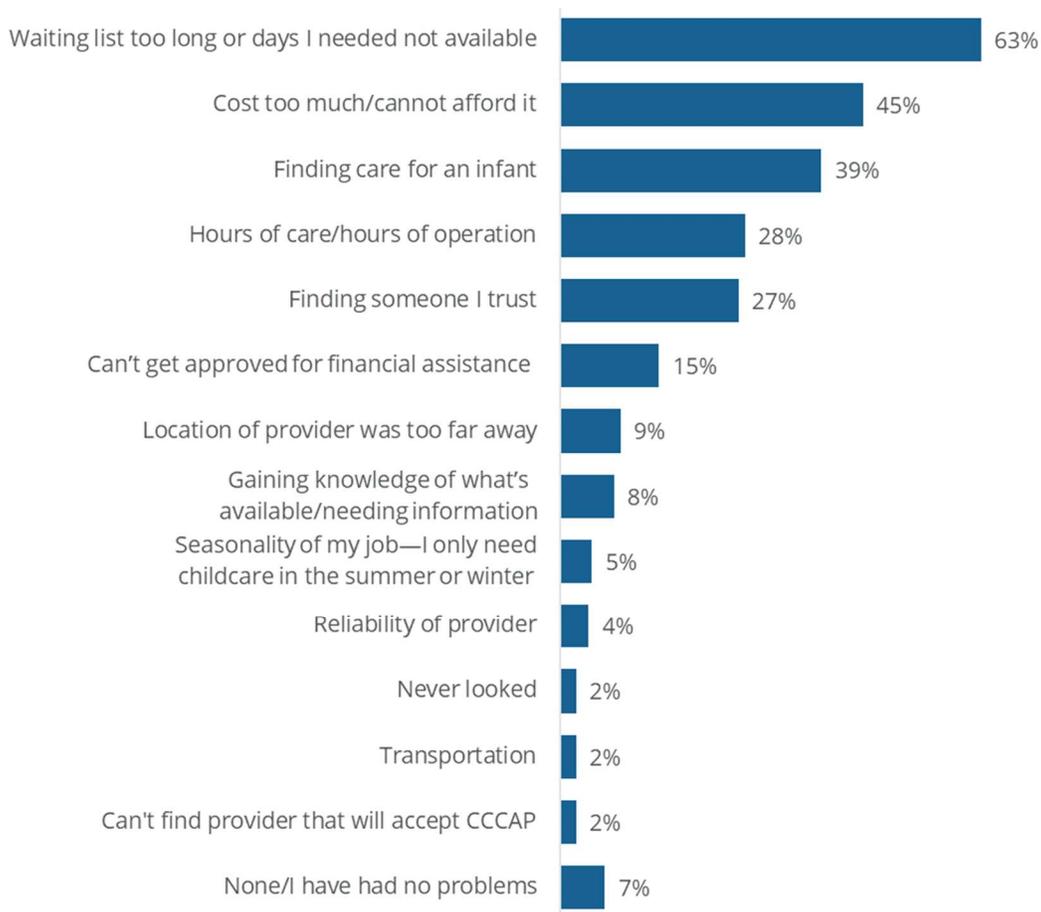
| | All Households using Non-Parent Care | Income: | | Num. of children: | | Industry: |
|--|--------------------------------------|--------------------|------------------|-------------------|---------------------|------------------------|
| | | Less than \$50,000 | \$50,000 or more | One child | More than one child | Atypical work schedule |
| No – the hours offered by my provider meet my needs | 35% | 24% | 36% | 36% | 35% | 34% |
| Yes – I need additional weekdays (but my provider is full) | 24% | 19% | 25% | 25% | 23% | 23% |
| Yes – I need earlier morning hours | 23% | 10% | 25% | 17% | 25% | 27% |
| Yes – I need weekend hours | 21% | 33% | 20% | 23% | 20% | 23% |
| Yes – I need evening hours | 17% | 24% | 16% | 20% | 16% | 19% |
| Yes – I need summer care | 14% | 19% | 13% | 6% | 17% | 9% |
| Yes – I need drop-in hourly care | 11% | 24% | 10% | 8% | 13% | 10% |
| Yes – I need overnight or night shift hours | 4% | 10% | 3% | 5% | 4% | 4% |

Note: n=202 total parent respondents. Those with atypical work schedules are classified as households in which at least one member is working in healthcare, restaurant/bar, or tourism and recreation.

Source: Root Policy Research from the 2021 Summit County Childcare Needs Survey.

Biggest challenges in finding and using childcare. In the past year, the vast majority (93%) of respondents with young children experienced one or more challenges finding and using childcare in Summit County. Figure III-12 displays the biggest challenges parents of young children faced. Note that respondents were explicitly prompted to select challenges they have faced outside of a COVID environment, so these data do not necessarily reflect challenges parents faced during COVID.

Figure III-12.
In the past 12 months, what were the biggest challenges, if any, you had in finding and using childcare/preschool for your children?



Note: n=209 parent respondents.

Source: Root Policy Research from the 2021 Summit County Childcare Needs Survey.

More than half of respondents with young children (63%) indicated that waitlists and unavailability of certain days were a major challenge. Many (45%) also faced cost challenges. This is comparable to data from other childcare studies: for instance, nearly half of parents in Clear Creek County and 45% in Summit County faced cost challenges, and 26% in Estes Valley said cost was a major challenge.

Nearly 40% of respondents faced challenges in finding care for an infant, suggesting a shortage of infant care providers in the area. Others also found hours of operation (28%) and finding someone they trust (27%) to be a major challenge.

Transportation was a much bigger issue for county residents living in Silverthorne compared to Frisco and Breckenridge: 4% of those in Silverthorne identified transportation as a major challenge compared to less than 1% of households in Frisco and Breckenridge.

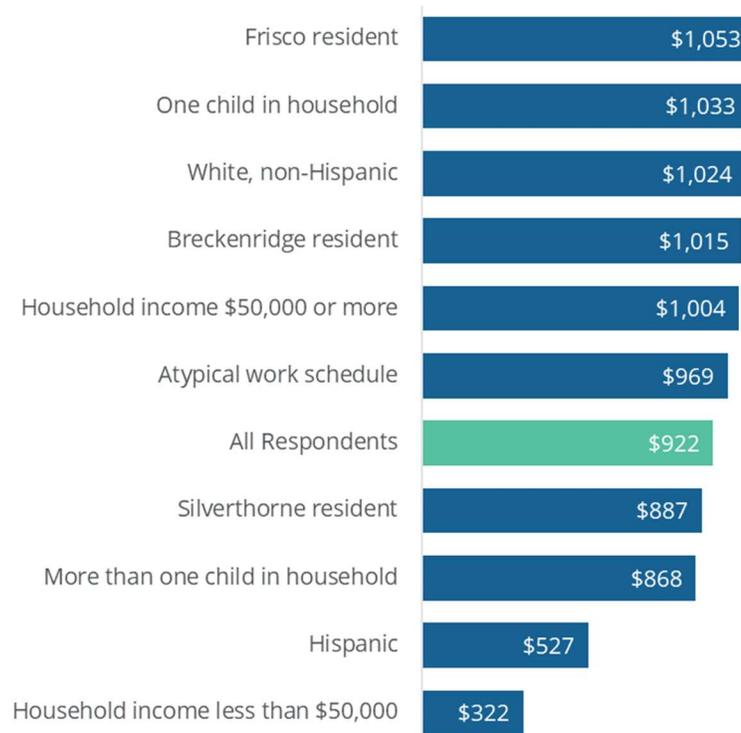
Hispanic parents (43%) were much more likely to indicate that finding someone they trust is a major challenge compared to White, non-Hispanic parents (23%). However, no respondents indicated that they couldn't find provider that speaks their language, nor did they indicate that they couldn't find provider information in their language.

Cost of childcare. Parents of young children shared the monthly amount they spend on childcare services. Figure III-13 presents the average monthly cost per child of childcare; note that the cost data are total household spending per child, regardless of the number/type of providers used in the course of a week.

Figure III-13.
Average Monthly Per-Child Cost of Childcare

Note:
n=205 households.

Source:
Root Policy Research from the 2021 Summit County Childcare Needs Survey.



On average, parents spend \$922 per month per child (under age 6) for non-parent care. Frisco residents spend more than Breckenridge and Silverthorne residents, at \$1,053 per month. Those with atypical work schedules (namely, those working in bar/restaurants, tourism/recreation, and healthcare) pay more than average, at \$969 per month.

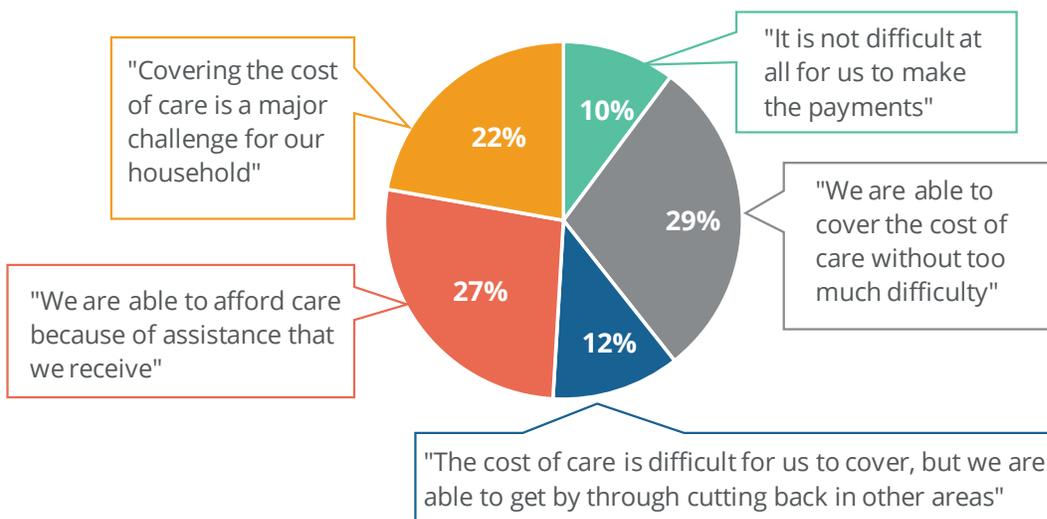
It is important to note that these data focus on what households pay and therefore do not include the value of subsidies provided by state or local sources. In addition, the data exclude children that are attending preschool at public elementary schools where tuition is subsidized by district funds and, in some cases, the Colorado Preschool program.

These cost estimates are below statewide averages—likely due to Summit County’s childcare subsidy programs. According to the Economic Policy Institute, the average monthly cost of childcare in Colorado is \$1,277 for infants and \$1,032 for preschoolers.³

Managing costs. As shown in Figure III-14, 39% of households with young children are able to cover the cost of childcare without too much difficulty (“it is not difficult at all” or “we are able to cover the cost of care without too much difficulty”). Thirty-four percent said covering the cost of care is “difficult” or a “major challenge.” Twenty-seven percent of all households said they are only able to cover childcare costs because of assistance received.

Of those who indicated that they pay for care by cutting back in other areas, many indicated that they reduce spending on entertainment, eliminate savings, or rely on credit card debt. Others indicated they were delaying buying newer vehicles or were putting off having more children.

Figure III-14.
How would you characterize the amount you pay for childcare/preschool per month?



Note: n=216 parent respondents.

Source: Root Policy Research from the 2021 Summit County Childcare Needs Survey.

³ “The cost of child care in Colorado” from the Economic Policy Institute, 2020. Available at: <https://www.epi.org/child-care-costs-in-the-united-states/#/CO>

If they couldn't afford the cost of care, parents of young children would adopt a variety of strategies to manage:

- 25% would move from Summit County;
- 19% would find resign from their job and/or find another job;
- 16% would seek alternative care (e.g., home care, bring in grandparent to watch children) or apply for financial assistance (i.e., Colorado Child Care Assistance Program, CCCAP);
- 9% would work more hours;
- 5% would find another job; and
- 4% would change their work shift(s).

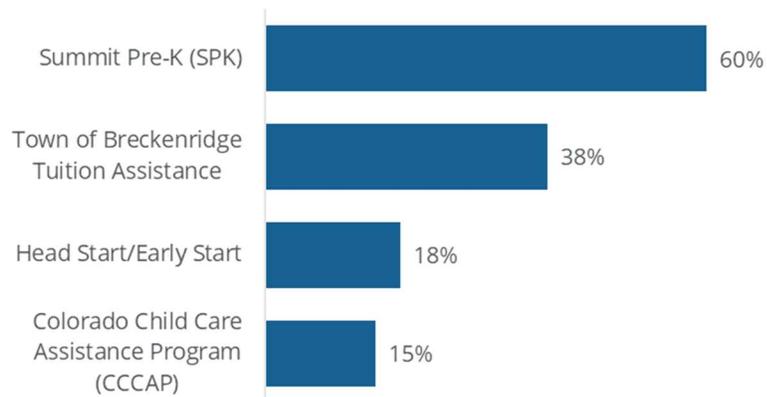
With over a quarter of residents indicating they would leave Summit County if care costs were unaffordable to them, it is especially important for the county's labor force maintenance that care be affordable to residents.

Assistance Programs. When asked which assistance programs affected childcare choices for parents of young children, 60% pointed to Summit Pre-K (SPK). Others also indicated the Town of Breckenridge Tuition Assistance affected their childcare choices.

Figure III-15.
Which of the following assistance programs has affected your childcare choices?

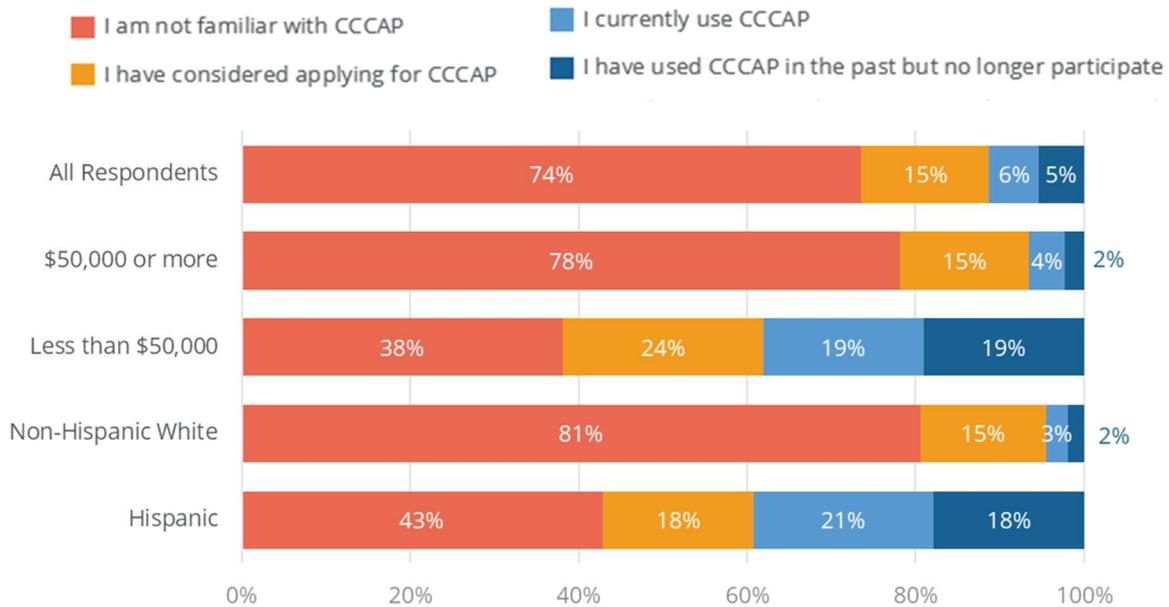
Note:
n=121 parent respondents..

Source:
Root Policy Research from the 2021
Summit County Childcare Needs Survey..



As shown in Figure III-16, Just 26% of parents with young children were familiar with Colorado Child Care Assistance Program (CCCAP), which provides financial assistance to qualifying families for childcare costs. Upper-income and White parents were less likely to be familiar with the program compared to lower-income parents and Hispanic parents. Overall, just 6% of respondents use CCCAP and 15% had considered applying.

Figure III-16.
What best describes your experience with CCCAP?



Note: n=121 parent respondents.

Source: Root Policy Research from the 2021 Summit County Childcare Needs Survey.

Among those who no longer participate in CCCAP, most (64%) said they no longer participate is because their income no longer qualifies. An additional 18% indicated their new provider does not accept CCCAP.

Those who have considered applying for CCCAP were asked why they have not. Many (71%) said they might not qualify due to their income. Others who have not applied to CCCAP indicated that their provider does not accept CCCAP (7%) and others said they needed assistance with paperwork (3%).

Activities and Care for School-aged Children

The following section summarizes survey responses of households with at least one child aged 6 to 12 about their care choices for before/after school and enrichment activities.

Out-of-school care choices. The majority (57%) of parents of 6 to 12 year-olds said their child is at home after school at least one day a week, either alone or with a guardian. This was more common among households with one child than those with multiple children and was more common among White respondents compared to Hispanic respondents.

Organized sports and lessons of various kinds (e.g., art, music, etc.) were common after school activities (38% and 37%, respectively) though these activities were more prevalent among households earning over \$50,000 compared to lower-income households. Lower 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.

Figure III-17.
Types of Before/After School Care Utilized by Children Ages 6-12

| | All Households | Income: | | Num. of children: | | Race/ethnicity: | | Industry: |
|--|----------------|--------------------|------------------|-------------------|---------------------|-----------------|--------------------|------------------------|
| | | Less than \$50,000 | \$50,000 or more | One child | More than one child | Hispanic | Non-Hispanic White | Atypical work schedule |
| At home (alone or with a parent/guardian) | 57% | 50% | 57% | 62% | 56% | 38% | 63% | 51% |
| Organized sports teams | 38% | 32% | 42% | 40% | 38% | 32% | 44% | 43% |
| Lessons (dance, art, musical instrument, etc.) | 37% | 35% | 38% | 33% | 38% | 36% | 37% | 30% |
| Before/after school program at a rec or community center | 33% | 26% | 35% | 22% | 38% | 28% | 33% | 28% |
| With a family member, friend, or neighbor | 26% | 32% | 27% | 25% | 26% | 40% | 24% | 28% |
| Other extra-curricular | 21% | 26% | 20% | 19% | 22% | 23% | 19% | 15% |
| Before/after school program at my child's school | 21% | 35% | 16% | 19% | 22% | 34% | 14% | 18% |
| Before/after school program at a childcare center | 16% | 47% | 7% | 5% | 20% | 38% | 5% | 14% |
| Licensed family childcare provider (in provider's home) | 8% | 24% | 3% | 5% | 9% | 21% | 2% | 5% |
| With a nanny, babysitter, or nanny-share | 6% | 15% | 4% | 5% | 7% | 15% | 3% | 4% |

Note: n=216 respondents. Percentages do not sum to 100% because many households use different types of care on different days.

Source: Root Policy Research from the 2021 Summit County Childcare Needs Survey.

Participation in before/after school activities and care also varied by geographic location in the county. For instance, just 26% of households in Frisco indicated their children participate in organized sports compared to 52% in Silverthorne. Households in Frisco were substantially more likely to use a licensed family care provide (30%) compared to those in Silverthorne (13%) and Breckenridge (3%).

Breckenridge residents were more likely to participate in rec center programs than other communities, which is consistent with the town’s primary after-school option provided by the rec center.

Figure III-18.
Types of before/after school care

| | All Households | Community | | |
|--|----------------|-----------|--------------|--------------|
| | | Frisco | Silverthorne | Breckenridge |
| At home (alone or with a parent/guardian) | 57% | 63% | 50% | 57% |
| Organized sports teams | 38% | 26% | 52% | 41% |
| Lessons (dance, art, musical instrument, etc.) | 37% | 33% | 33% | 40% |
| Before/after school program at a rec or community center | 33% | 0% | 29% | 48% |
| With a family member, friend, or neighbor | 26% | 15% | 29% | 17% |
| Other extra-curricular | 21% | 30% | 25% | 19% |
| Before/after school program at my child's school | 21% | 30% | 33% | 9% |
| Before/after school program at a childcare center | 16% | 19% | 25% | 10% |
| Licensed family childcare provider (in provider's home) | 8% | 30% | 13% | 3% |
| With a nanny, babysitter, or nanny-share | 6% | 4% | 12% | 3% |

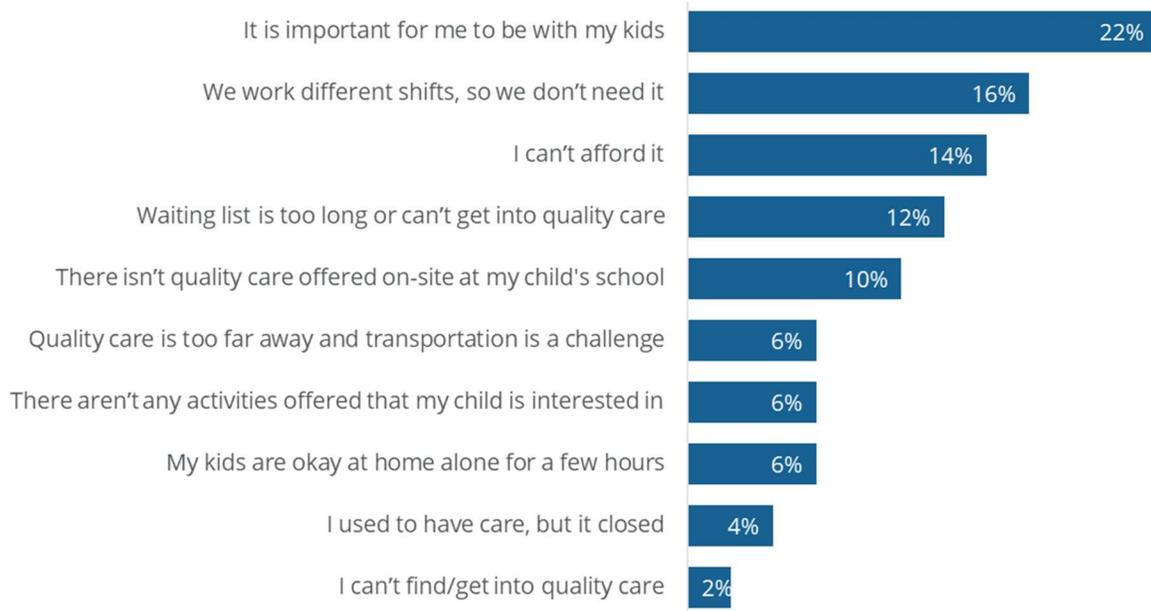
Note: n=216 parent respondents. Percentages do not sum to 100% because many households use different types of care on different days.

Source: Root Policy Research from the 2021 Summit County Childcare Needs Survey.

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 (see Figure III-19).

Figure III-19.

What is the main reason why you do not have someone else regularly care for your child(ren) before or after school?



Note: n=49 parent respondents.

Source: Root Policy Research from the 2021 Summit County Childcare Needs Survey.

Factors in choosing activities. Parents with a 6-12 year old in some type of before/after school activity rated the importance of 14 factors in their decision to select a specific care option or activity. Figure III-9 shows the average rating of each factor among all households and by race/ethnicity of respondent, number of children, and household income. The top three factors for each category are highlighted in green.

Parents rated “wanted sports/arts opportunities for child,” “values/comfortable with this provider,” and “location/transportation” as the most important factors.

Low income households were more likely to indicate that learning/educational opportunities were important compared to upper income households.

Households with more than one child were more likely to indicate that hours of operation were important compared to households with just one child.

Compared to White respondents, Hispanic respondents were more likely to indicate that affordability and cost were important. They were also much more likely to indicate that a family/home environment was important and that the caregiver speaking a language other than English was important.

Figure III-20.

Think about the factors you considered when you were evaluating different out-of-school programs for your school-aged children. Rate the importance of each on a scale from 0 to 9, where 0 means not important at all and 9 means very important.

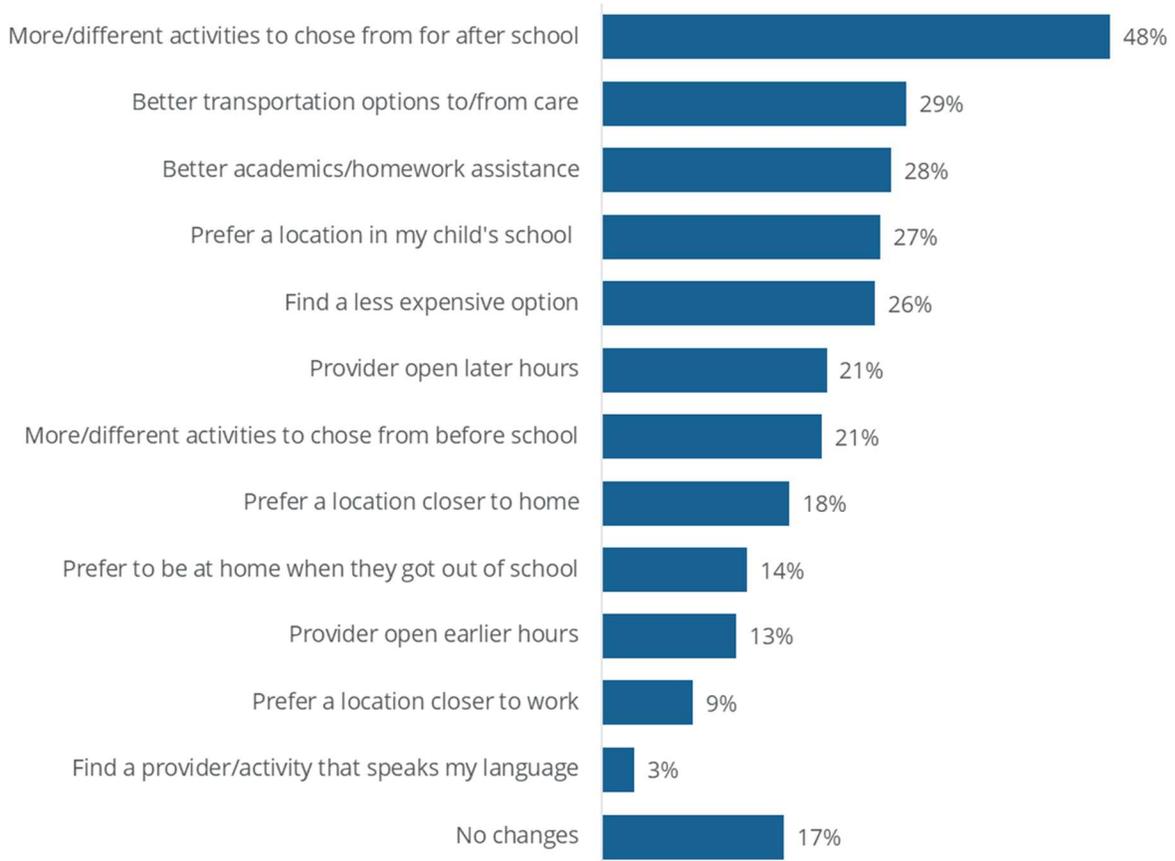
| | All Households | Income: | | Num. of children: | | Race/ethnicity | |
|---|----------------|--------------------|------------------|-------------------|---------------------|----------------|--------------------|
| | | Less than \$50,000 | \$50,000 or more | One child | More than one child | Hispanic | Non-Hispanic White |
| Wanted sports/arts opportunities for child | 7.3 | 7.9 | 7.3 | 7.4 | 7.3 | 7.5 | 7.4 |
| Values/comfortable with this provider | 7.3 | 7.8 | 7.3 | 7.5 | 7.2 | 7.7 | 7.2 |
| Location/transportation (e.g. close to home/work, can carpool or bus, etc.) | 7.3 | 7.5 | 7.2 | 7.4 | 7.2 | 7.7 | 7.2 |
| Hours of operation | 7.2 | 7.6 | 7.1 | 6.9 | 7.3 | 7.5 | 7.1 |
| Wanted learning/educational opportunities for child | 7.1 | 8.2 | 6.9 | 7.0 | 7.2 | 7.5 | 7.1 |
| Affordability/cost | 7.0 | 7.8 | 6.8 | 6.4 | 7.2 | 7.7 | 6.7 |
| Reputation/referrals | 6.6 | 7.6 | 6.5 | 6.7 | 6.6 | 7.5 | 6.3 |
| Wanted a licensed provider | 5.8 | 7.0 | 5.5 | 5.8 | 5.8 | 6.7 | 5.4 |
| Already at the school/continuity with school | 5.5 | 6.3 | 5.3 | 5.4 | 5.6 | 6.3 | 5.2 |
| Only type available/nothing else available | 4.4 | 6.2 | 4.0 | 4.2 | 4.5 | 6.1 | 3.8 |
| Wanted a family/home environment | 3.9 | 7.6 | 2.9 | 3.4 | 4.0 | 6.8 | 2.6 |
| Wanted more than one adult with child | 3.6 | 5.0 | 3.3 | 3.1 | 3.9 | 5.2 | 3.0 |
| Wanted one-on-one care for the child | 3.1 | 5.2 | 2.6 | 3.0 | 3.1 | 4.8 | 2.3 |
| They speak a language other than English | 2.7 | 5.6 | 2.1 | 2.6 | 2.8 | 6.0 | 1.5 |

Note: n=184 parent respondents.

Source: Root Policy Research from the 2021 Summit County Childcare Needs Survey.

Desired changes. 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%). Figure III-21 shows desired changes.

Figure III-21.
If you could change your typical before/after school care arrangements, you would...



Note: n=196 parent respondents.

Source: Root Policy Research from the 2021 Summit County Childcare Needs Survey.

Labor Force Impacts

The challenges that families face related to childcare have impacts beyond their household—they also affect employers and the economic health of local communities.

Missing work. When asked if they had faced issues/consequences at work as a result of childcare problems, the vast majority of respondents indicated that they had been late to work or left early (75%) or missed part of a work shift/day (71%).

Figure III-22.
As a result of childcare problems, have you or your partner ever...

| | All Households using Non-Parent Care | Income: | | Industry: |
|---|--------------------------------------|--------------------|------------------|------------------------|
| | | Less than \$50,000 | \$50,000 or more | Atypical work schedule |
| Been late for work or left work earlier than normal | 75% | 65% | 76% | 78% |
| Missed part of the work shift or a full day of work | 71% | 56% | 75% | 74% |
| Reduced your regular work hours | 55% | 52% | 55% | 58% |
| Been distracted at work | 52% | 20% | 58% | 55% |
| Quit a job | 13% | 28% | 11% | 10% |
| Been reprimanded by a supervisor | 8% | 11% | 7% | 3% |
| Been let go or fired | 1% | 4% | 1% | 2% |

Note: n=346 parent respondents.
 Source: Root Policy Research from the 2021 Summit County Childcare Needs Survey.

Households with more than one child were more likely to face workplace consequences due to childcare problems. Low income households were more likely to have a worker be let go/fired or reprimanded by a supervisor due to childcare problems than those in households earning \$50,000 or more. Parents working in healthcare, tourism/recreation, or restaurants/bars were more likely than the overall population to be late for work or leave early, miss a shift, or reduce their hours.

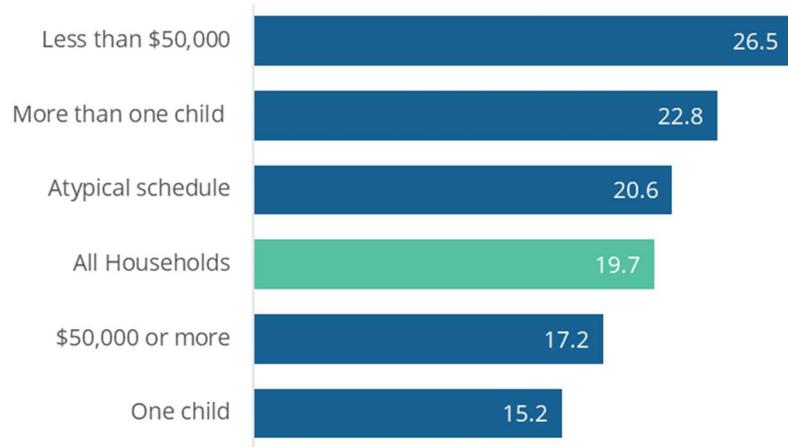
Parents who indicated they missed a day/shift of work were asked how many days they'd missed work in the past year because they could not find childcare. The average number of days was 19.7. Households earning less than \$50,000 lost more workdays on average, at 26.5. Households with more than one child (22.8) and households in which one or more parents worked in healthcare, bar/restaurants, or tourism/recreation (20.6) also lost more work days

than the average Summit County parent. At average county-wide wages, 20 days of lost work equates to \$3,560 in lost wages each year per worker—nearly one full month of lost wages.⁴

Figure III-23.
In the past year, how many days have you or your partner missed work because you couldn't find childcare?

Note:
 n=225 parent respondents.

Source:
 Root Policy Research from the 2021 Summit County Childcare Needs Survey.



In addition to wage losses because of missed work, absences or bringing a child to work may negatively affect parents' promotion potential. Studies have suggested a 'child penalty' to mothers' wages, where they are perceived as not being as committed to their jobs as childless counterparts.⁵ This perception was exacerbated during the pandemic.⁶

Further, faced with high childcare costs, some households often choose to keep an adult out of the labor force in order to provide care in the home instead. Academic research conducted across the United States estimates that a 10% reduction in the price of childcare would lead to a 0.5 to 2.5% increase in mothers' employment.⁷ Our study indicates that many Summit County parents (19%) would consider quitting their jobs or finding another job if childcare became too expensive, which would negatively affect their present and future earnings.

⁴ Wages based on Bureau of Labor Statistics Quarterly Census of Employment and Wages which reports \$46,289 as the average annual wage in Summit County in 2020.

⁵ Burgess, N. (2013). The Motherhood Penalty: How Gender and Parental Status Influence Judgements of Job-Related Competence and Organizational Commitment.

⁶ Kouki, A., & Sauer, R. M. (2020). Child Health, Remote Work and the Female Wage Penalty.

⁷ Morrissey, Taryn W. "Child care and parent labor force participation: a review of the research literature." *Review of Economics of the Household* 15.1 (2017): 1-24.

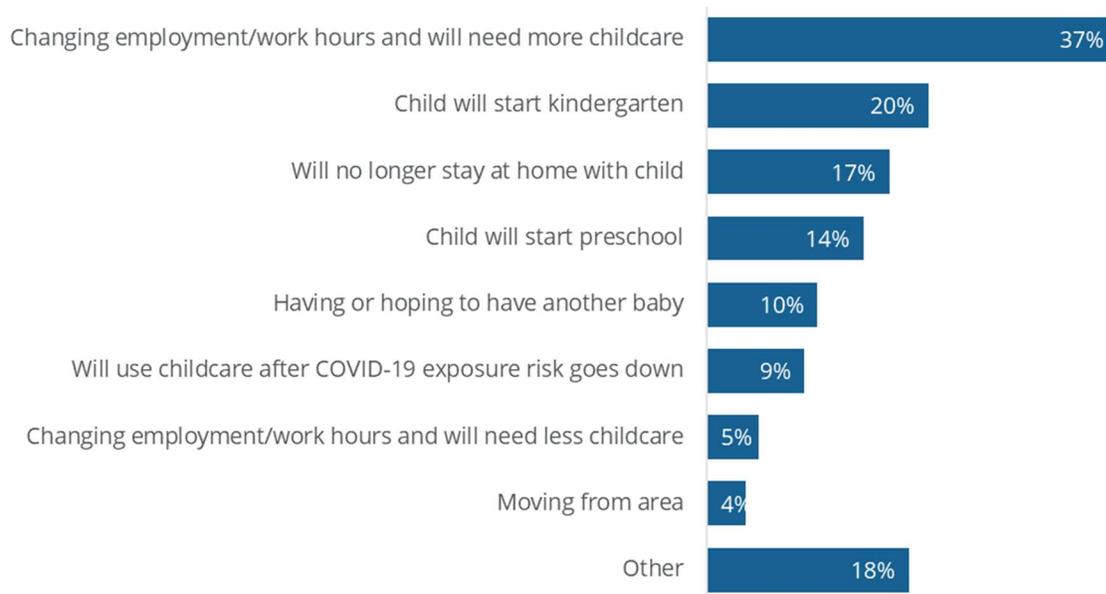
Looking Ahead: Care Needs Next Year

Nearly half (45%) of survey respondents indicated that their childcare needs were likely to change over the next 12 months.

Figure III-24 indicates that among all respondents, 37% indicated they would be changing their employment or work hours and would need more childcare coverage. Others said their child would be starting kindergarten (20%) and some said they would no longer stay at home with their child (17%).

Figure III-24.

Why are your childcare needs likely to change in the next 12 months?



Note: n=169 parent respondents.

Source: Root Policy Research from the 2021 Summit County Childcare Needs Survey.

Overall, many households indicated they would need more childcare in the next 12 months, either because they were changing work schedules, having another child, no longer staying at home with children, or planned to use childcare after COVID risks decreased. This means Summit County should expect an increase in demand in childcare, which we discuss more explicitly in the subsequent section.

SECTION IV.

PROVIDER PERSPECTIVES

SECTION IV.

Provider Perspectives

This section presents the results of Root Policy Research’s outreach to existing providers—both licensed and non-licensed—and their perspectives on demand for childcare and barriers to providing care throughout the County. Outreach included an early childhood childcare provider survey (open to childcare workers, center directors, licensed family care providers, and license exempt providers) as well as interviews with non-licensed care providers and after-school care providers.

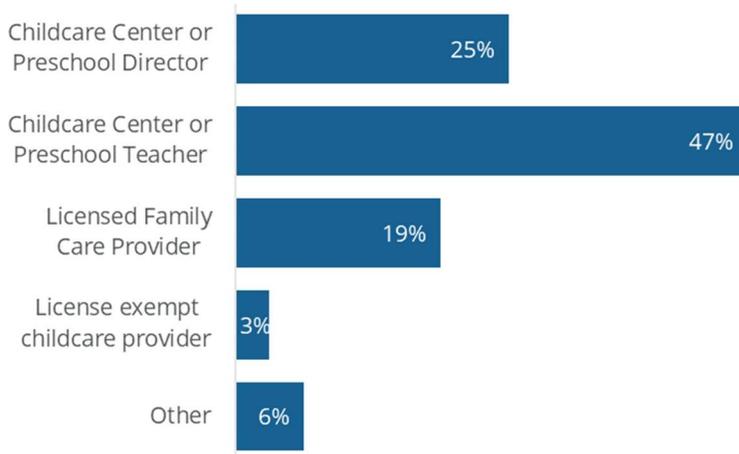
Early Childhood (under 6) Childcare Providers

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. Most represented center-based care (25% were childcare center preschool directors and 47% were childcare center or preschool teacher) but 19% were licensed family care providers and 3% were licensed exempt providers (nanny, friend/family member providing informal childcare, in-home provider with fewer than 4 children in care, etc.).

Figure IV-1.
Provider Survey
Respondents by
Care Type

Note:
Other includes former childcare teachers and other childcare stakeholders..

Source:
2021 Childcare Provider Survey and Root Policy Research.

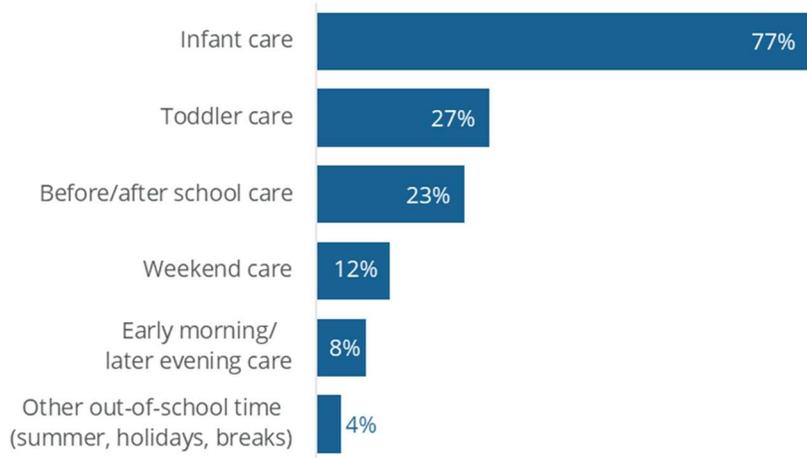


Demand for care. The vast majority (92%) of providers noted the need for childcare has increased over the past 5 years. As illustrated in Figure IV-2, providers perceive infant care to have the most severe shortage—77% of respondents said infant care was the biggest need countywide.

When asked about expressed parent preferences in selecting care, providers noted that availability and cost are the top two concerns.

Figure IV-2.
Based on your perception of childcare demand in the county, where is the biggest shortage in terms of types of care?

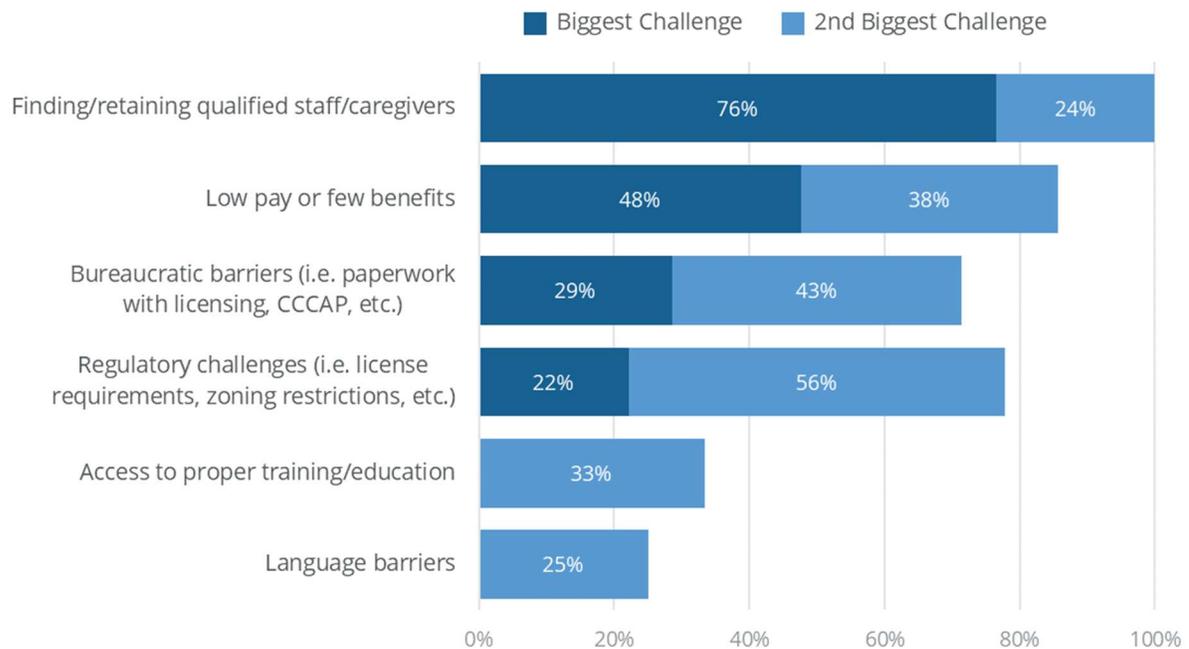
Source:
 2021 Childcare Provider Survey and Root Policy Research.



Given the high demand for childcare countywide, Center Directors were asked if they have considered expansion of their facility to care for more children. Most indicated they were not considering expansion due to concerns about their ability to staff increased capacity and/or their ability to maintain quality of care under an expansion.

Challenges in providing care. Survey respondents were also asked about the biggest challenges they face in providing care (excluding COVID-related challenges).

Figure IV-3.
What have been the biggest challenges providing childcare in the past three years? [Think about challenges outside of a COVID environment].



Source: 2021 Childcare Provider Survey and Root Policy Research.

The biggest challenge identified by providers was finding/retaining qualified staff care/givers, followed by the related challenge of low pay or few benefits. Bureaucratic and regulatory barriers were less likely to be considered a “biggest” challenge” but still posed substantive secondary challenges to providers. Education and training as well as language barriers were also considered secondary challenges.

Other challenges identified by providers in an open response questions included¹:

- *Exhaustion from understaffing.*
- *A big challenge for me is healthcare. I can not afford private healthcare due to low wages, yet healthcare is not benefit that is offered. Therefore healthcare is not an option if I choose to stay in the ECE field. I think this is a huge determining factor in why we do not retain staff.*
- *Staff retention is the biggest.*
- *Lack of substitutes makes this things very difficult when myself or my kids get sick - I feel like I can't take time off. "*
- *Disrespected field for mostly women.*
- *Consistency with support for EL students and understanding of their language support.*
- *2 under 2 rule limits capacity which limits income.*
- *The affordability and accessibility of housing for both local and out of town prospective staff.*

However, providers also commented on the biggest benefits of working in the childcare industry—the things they love most about their jobs [select, representative response below]:

- *The children.*
- *I love the joy children experience each day, I love watching them interact with each other and teachers, observing them learn new skills and helping them to develop those skills. I love the sense of community within the families and staff.*
- *I love that I get the opportunity every day to build relationships with families in our community.*

¹ Quotes reflect select, representative responses from open-ended survey questions.

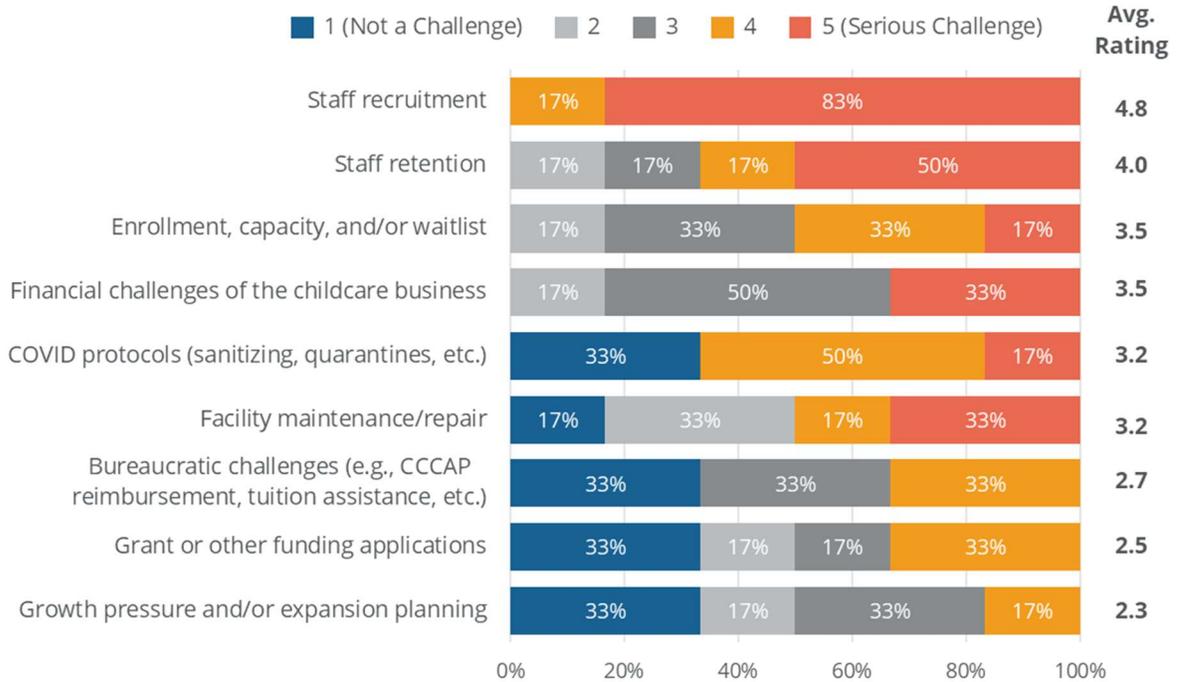
- *I love getting to know the kids and the families. I love being a positive impact on people's lives.*
- *Bonding and attachments to the children and their families. Longevity of clients, children start as infants and I care for them until they go to Kindergarten. Watching them grow into intelligent, secure and health individuals.*
- *Fun, energetic environment with kiddos.*
- *Making a visible, immediate difference on things that actually matter in the long-term. Also I like that I can somewhat count on 'open' hours being within reason, offering at least the suggestion of work/life balance.*
- *Partnering with families.*
- *I get to spend all day with my baby and help out some other awesome families*
- *Providing children with happy safe learning environments. Helping families in time of need. They know there children are well taken care of so many great people and families we meet.*
- *I can get a discount for my child or children when I have them at the school. My children are also able to be in the same building that I work in, when I have them.*
- *The value of the work. The impact on so many lives currently and into the future. The need to advocate for the students, staff and industry as they are under recognized and under served in the greater community.*

Center director challenges. Respondents who indicated they were childcare center or preschool directors were asked to rate potential management challenges on a scale of 1 to 5, where 1 means “not a challenge at all” and 5 means a “serious challenge.”

As shown in Figure IV-4, Staff recruitment had the highest overall rating (4.8 out of 5), with 83% of respondents identifying it as a “serious challenge.” Staff retention had the second highest average rating of 4.0, followed by enrollment, capacity, or waitlist (3.5) and financial challenges (3.5).

Figure IV-4.

What are your biggest challenges as a center director? Please rate the following potential challenges on a scale of 1 to 5 where 1 means “not a challenge at all” and 5 means a “serious challenge.”

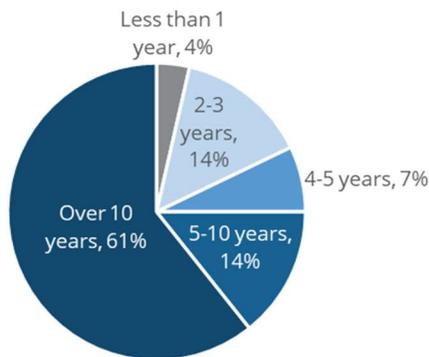


Source: 2021 Childcare Provider Survey and Root Policy Research.

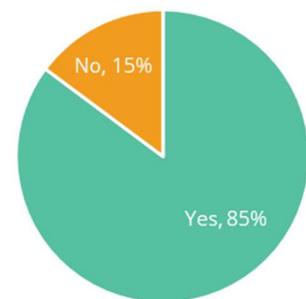
Staff retention. Overall, the survey sample was comprised of childcare professionals who had been working in the industry for a long time—61% had been in the industry for more than 10 years—and the vast majority intend to continue in the field. Among those who said they do not intend to stay in the industry, reasons included wages, benefits, retirement, and frustration with superiors.

Figure IV-5. Respondent Tenure & Intention

How long have you worked as a childcare professional?



Do you intend to stay in the childcare industry over the next 5 years?



Source:
2021 Childcare Provider Survey and Root Policy Research.

About one out of every five survey respondents said they had quit working at a childcare facility, switched to a different care facility, or switched to a different career entirely, in the last five years. The reasons they provided were varied but included low pay, changes in life circumstances, other career opportunities, and disagreements with management.

Center Directors were also asked about staff retention and departures. All director respondents indicated they had at least one childcare worker resign in the past 3 years. Their perspective on employee departure mirrored the reasons given by workers: low pay and high cost of housing, life changes, and other career opportunities.

“The work is difficult and under valued as a whole. There are opportunities to earn the same or a similar income in other less demanding industries.”

– Summit County Childcare Center

Role for county and ECO. Survey respondents were also asked to provide any additional comments to ECO and/or the County in response to the following questions:

- From your perspective as a childcare or program provider, what could the County and/or Early Childhood Options do to improve your work or childcare provisions in the county?
- What else, if anything, would you like Summit County and/or Early Childhood Options to know about providing childcare services in Summit County?

Select responses that are broadly representative of comments include:

- *Come up with more teachers who are qualified.*
- *More home daycare providers are needed... I think we need to advertise more the strengths of daycare as a profession to interest others.*
- *Insurance/benefits options for teachers.*
- *ECO has always been so helpful and accommodating. They have been tireless advocates for family providers.*
- *I feel Early Childhood Options is doing an amazing job supporting Early Childhood in Summit! Don't know what we would do without them!*
- *Have more affordable housing for year round workers and help centers with salary supplements.*
- *Provide a pool of qualified subs to be used when teachers or paras need to take a day off. Not only for sick days, but also for personal days.*

- *Assist with recruitment, vet applicants on our behalf, provide housing stipends to assist with recruitment, provide a relocation package to support recruitment outside our community pool, provide housing- even temporary.*
- *Support with funding to provide high quality/ relatable trainings for staff.*
- *Allow more children under two or stop taking away my three and older children with low cost options... "Centers" are taking all children three and older which limits home providers.*

Spanish language provider interviews. Root Policy also conducted outreach specifically to Spanish-speaking childcare providers, who are providing friend/family care or license exempt care. To this end, Root hosted a virtual focus group conducted exclusively in Spanish and worked closely with ECO to recruit attendees. However, due to limited participation, we are characterizing the conversation as interviews as opposed to a full focus group.

The navigator noted participation was lower than anticipated due the hesitancy from undocumented childcare providers to participate on these types of events. The navigator indicated that in addition to being afraid around their legal status, many providers are afraid around their landlords finding out that they provide such services from their rental units. Such hesitation is an important finding in and of itself as it speaks to the challenges faced by informal care providers who do comprise a critical component of the county's childcare-related infrastructure.

Key highlights from Spanish-language provider engagement are summarized below.

Current market demand. Providers noted that demand for childcare vastly outstrips supply in the area. Some providers began providing childcare services due to lack of options for her grandchildren but have continued to provide care for others as well. Providers also expressed concern about the lack of available options countywide, which puts some parents in the position of enrolling their children in places with substandard care. Similarly, providers are concerned that the limited supply of qualified teachers forces providers to hire unqualified people that are not providing the level of care children need.

Barriers. One participant is the process of obtaining a family care home license but finds the process very long and questions whether it is financially worthwhile to pursue the license.

Support. Providers consider the resources provided through ECO helpful, especially the CPR and first aid classes offered. Providers did indicate more support for kids with special need would be very helpful. For example, one provider currently has a child with a disability that needs physical therapy, she would like to be able to have support to get the therapist to provide light training or conduct PT while the child is in her care so she can learn and provide better care that fits the needs of the child.

After-School Care Providers

Root also conducted interviews with a variety of before/after school care providers offering consistent programs to elementary school students (ages 6-12). Key findings from those interviews are summarized below by topic.

Note that these interviews were conducted prior to the recent announcement of Keystone Science School suspending after school programming.

Demand. Overall, stakeholders described strong demand for the afterschool care programs in general, and specifically for those provided on-site at elementary schools or with transportation from elementary schools to the programming site.

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

– Summit Count stakeholder

One stakeholder noted that consistency needs to be the hallmark of afterschool programs in Summit County, adding that “some activities or programs are Monday and Wednesday or Tuesday and Thursday...this makes it difficult and more complex for families to schedule around.” This stakeholder noted that other entities that are set up well to provide consistent afterschool childcare are not inclined to become licensed afterschool childcare providers.

It is noted that the burden of consistent, on-site options is largely provided by relatively few entities countywide, none of which are specifically coordinated by the school district. This puts disproportionate pressure on existing programs—including non-profits and rec centers—to shoulder the burden of after school care. This also makes the after-school infrastructure more vulnerable to sudden changes in care provision—as evidenced by the recent cancellation of Keystone Science School (KSS) programming.

Staffing and capacity. Several stakeholders described the lack of staff and capacity as major barriers in providing afterschool care for K-5 students. One stakeholder described this problem as connected to a larger challenge of trying to maintain a mountain workforce, noting that cost of living is a major barrier when recruiting people to fill open positions.

Several stakeholder indicated they had tried innovative strategies for staffing and compensation, including coordination with school positions, other positions within their organization, and creative bonus/benefits structure but none have provided reliable, replicable results.

Stakeholders shared a similar sentiment that for afterschool care to be available, affordable, and sustainable in Summit County, there needs to be “more players in the game” both from a staffing perspective but also in terms of additional programs that offer a variety of experiences and curriculums. They emphasized the need for a collaborative

partnership amongst the County, school district, municipalities, and nonprofit organizations to make afterschool care in Summit County successful.

Funding. Funding varies across program types but is a common challenge among afterschool providers. One stakeholder commented that have sufficient capacity available at all of the elementary schools, “you would need to fundraise millions for it.”

Some elementary schools are able to partner with municipalities to fund programs, however, schools located in unincorporated Summit County are at a disadvantage. While some schools might be offered funding to work in conjunction with a municipality, others rely on traditional non-profit fundraising capacity or a variety of grants to supplement the tuition parents pay.

Several stakeholders felt if the County took a primary role in coordinating/funding afterschool care throughout the county, some of the resource disparities among schools could be better addressed.

Transportation. For afterschool programs not taking place onsite at schools, it’s difficult to not only transport children to different locations but also difficult for working families to get to those locations.

One stakeholder discussing transportation barriers and childcare articulated that the north side of the county has the highest percentage of working families, adding that “if they can’t have their kids somewhere until 5pm, they can’t live [in Summit County].”

Another stakeholder noted that their organization provides transportation from one elementary school to their afterschool program location but does not have the capacity or funding to provide transportation for all elementary schools in the county.

Summer camp options. Stakeholders generally felt that there were many summer camp/care options but coordination and affordability are challenges for local residents. Many camps offer more limited hours in the summer (e.g., 9am-3pm) and/or sell out within minutes, or are at prices out of reach for lower and middle income families.

One stakeholder suggested that organizations and municipalities set aside space in their summer camps and activities for children receiving free and reduced lunch. While this stakeholder felt this would open up access for these children, they also cautioned that some parents, due to transportation challenges or job demands, might not be able to get their kids to these activities.

One stakeholder also noted that a major reason that people live in Summit County is to experience the outdoors, however, “many of our families who keep this community running don’t get to experience the outdoors.” This stakeholder suggested specific and targeted programs or opportunities be made available to working families to experience the outdoors.

Stakeholder-suggested solutions. Stakeholders suggested several 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. Specific solutions are detailed below.

- **Program coordination.** Stakeholders agreed that the County could take a more proactive leadership role in coordinating afterschool childcare programs across the county. One stakeholder felt that in addition to being best positioned to manage the decentralization of a countywide afterschool program, they could help “implement standardized trainings to staff and ensure an equitable distribution of quality across all on-site programs”, as well as provide a reliable source of funding.

One stakeholder suggested coordinating with the County or Summit Stage to have bus drivers on existing routes be able to take children from school to the local recreation center or other program sites for afterschool care. They also suggested that the county could help better align existing transit schedules with pick-up and drop-off times at school.

- **Logistics coordination.** One stakeholder suggested that the county hire a bilingual activity navigator to help coordinate activities for children of working families. They emphasized that the person in this position would have to be bilingual or “it won’t work”. Additionally, stakeholders felt the County could help coordinate sign-ups for all summer camps and activities in one place or have them available at each school. This stakeholder also advocated for organizations or municipalities to provide set aside spots for kids on free and reduced lunch, or have the county subsidize their spots. They added that having a preference and financial subsidy for these kids would allow them to participate in these activities when they wouldn’t be able to otherwise.
- **Funding.** Multiple stakeholders advocated for County funding either as a supplement to provider wages or for program operations noting that if the County was able to make wages more competitive, that would help to retain current staff and attract new staff. After-care providers commended the county on support for ECE programs but would like to see more public sector attention to be put on the needs of K-5 students. They added that “we forget wraparound services for school aged programs...we need this.”
- **Collaborative partnerships.** Several stakeholders felt that a collaborative approach to childcare in Summit County would yield the best outcomes for K-5 students. For afterschool care, stakeholders felt that the County could take on more of the responsibility to coordinate afterschool care but still partner with nonprofit organizations and the school district to assist with the provision of after-care services. As one stakeholder said, “nonprofit organizations take on a disproportionate amount of afterschool duties...it’s not a sustainable model.”

- One stakeholder also suggested the County make an effort to form partnerships with ski resorts or other organizations that host outdoor activities and make them more accessible for children on free and reduced lunch.
- Another stakeholder advocated for afterschool programs to take place onsite and suggested that the County work with the school district to divvy up the contracts amongst different nonprofit organizations to provide afterschool care at the elementary schools, noting that “this would help with capacity issues.”

SECTION V.

DEMAND ANALYSIS AND FORECAST

SECTION V.

Demand Analysis and Forecast

The demand model used in this study is similar to the model developed for previous demand studies conducted by Root Policy Research (formerly under the umbrella of BBC Research & Consulting) for the Town of Breckenridge and Summit County. It is designed to quantify changes in demand for licensed childcare in Summit County through 2035. The model described below focuses on all types of licensed childcare collectively (childcare centers, elementary school ECE programs, and family childcare homes).

Forecast Model Structure

The demand model accounts for two primary components or drivers of demand for childcare: residents and in-commuters. Summit County residents account for about 96% of current licensed childcare use in the county. As such, they are the key component to determining future demand.

To determine future childcare needs among residents, Root first examined the current number and proportion of non-seasonal Summit County residents that are children under six years old and the number and proportion of those that are currently using or waitlisted for licensed childcare. Root then evaluated population and household forecasts from the Colorado Department of Local Affairs (DOLA) through 2030. Combining the DOLA forecasts with the proportion of children in licensed childcare provided a baseline demand projection for future childcare capacity needs.

Childcare users that work in Summit County but do not live in Summit County (in-commuters) are the second key driver of childcare demand. In 2022 in-commuters' children accounted for 4% of the licensed childcare population. In order to forecast demand from this segment, Root followed a similar methodology as discussed for residents, beginning with the current number of in-commuters and the proportion with children currently in licensed childcare in Summit County. Root then applied that proportion to DOLA forecasts of in-commuters to estimate the number of in-commuter children needing childcare in 2030.

Root did not have information on whether children on the waitlist are living in resident or in-commuter families. For the purposes of modeling future demand, waitlisted children were assumed to have the same geographic distribution as children currently in care: 96% residents and 4% in-commuters.

There may also be a very small proportion of future childcare users that neither live nor work in Summit County. Demand from these families is modeled as non-resident demand and is assumed to follow similar growth patterns as in-commuter demand.

Demand Projections

Figure V-1 displays current and future childcare demand among residents and in-commuters. As shown in the figure, in 2022 there were 1,285 children using or needing licensed childcare in Summit County—726 in care and 559 on waitlists. Of these, 1,234 are Summit County residents and 51 are in-commuters

DOLA forecasts a 9% increase in the overall population of Summit County between 2022 and 2030 but just a 5% increase in the Summit County population under age six. In other words, the number of young children is forecasted to increase slower than the population overall. Workers and-commuters are also forecasted to increase, but not at the same rate as residents or as children living in Summit County.

Applying the current demand rates for childcare to demographic and economic projections through 2030 yields an estimate of 1,351 individual children who may desire childcare in Summit County in 2030, a relatively modest increase from 2022.

Figure V-1.
Number of Children Needing Childcare in 2022 and 2030, Summit County

| | 2022 | 2030 | Difference |
|--|--------------|--------------|------------|
| Summit County Residents | | | |
| Resident Households | 12,960 | 14,142 | 1,182 |
| Resident population | 31,047 | 32,954 | 1,907 |
| Number of children under 6 | 1,442 | 1,517 | 75 |
| Children under 6 in licensed care | 697 | 733 | 36 |
| Children under 6 on waitlist for care | 537 | 565 | 28 |
| In-commuters and non-residents | | | |
| Non-resident children in care in Summit County | 29 | 30 | 1 |
| Non-resident children on waitlist for care | 22 | 23 | 1 |
| Total children using/needing licensed childcare | 1,285 | 1,351 | 66 |

Source: Root Policy Research.

Childcare capacity is not determined strictly by number of children but also by frequency of use. Not all of these children will occupy childcare slots five days per week. The number of childcare slots per day or week can be a more helpful measure of use and demand than the number of children. If we convert the number of children needing care in 2030 to

spaces in licensed provider programs based on the days of the week families currently use care, we project a need for 1,140 daily childcare spots in 2030.

This estimate far exceeds the current capacity of 661 licensed daily spots.

**Figure V-2.
Number of
Children by Days
per Week and
Total Childcare
Slots Needed in
2025**

Source:
Root Policy Research.

| | 2022 | 2030 | Difference |
|--|--------------|--------------|------------|
| Demand: Number of Children | 1,285 | 1,351 | 66 |
| Number of days per week | | | |
| 1 day | 3% | 45 | |
| 2 days | 6% | 79 | |
| 3 days | 14% | 188 | |
| 4 days | 20% | 266 | |
| 5 days | 57% | 773 | |
| <i>Average Days per Week per Child</i> | 4.2 | 4.2 | |
| Demand: Childcare Slots per Day | 1,084 | 1,140 | 56 |
| Current Daily Capacity | 661 | 661 | |

APPENDIX A.

DATA PRESENTATION SLIDE DECK

Summit County

CHILDCARE & AFTER SCHOOL CARE NEEDS ASSESSMENT



PRESENTED BY

Mollie Fitzpatrick, *Managing Director*

Project Objectives & Components

ECO and Summit County want to understand childcare and ECE needs and choices among parents/guardians—building on previous demand studies and surveys.

For the first time, including out-of-school time care needs for children aged 6-12.

Study Components:

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

CONTEXT SETTING
SOCIOECONOMIC
TRENDS & CHILDCARE
OPTIONS

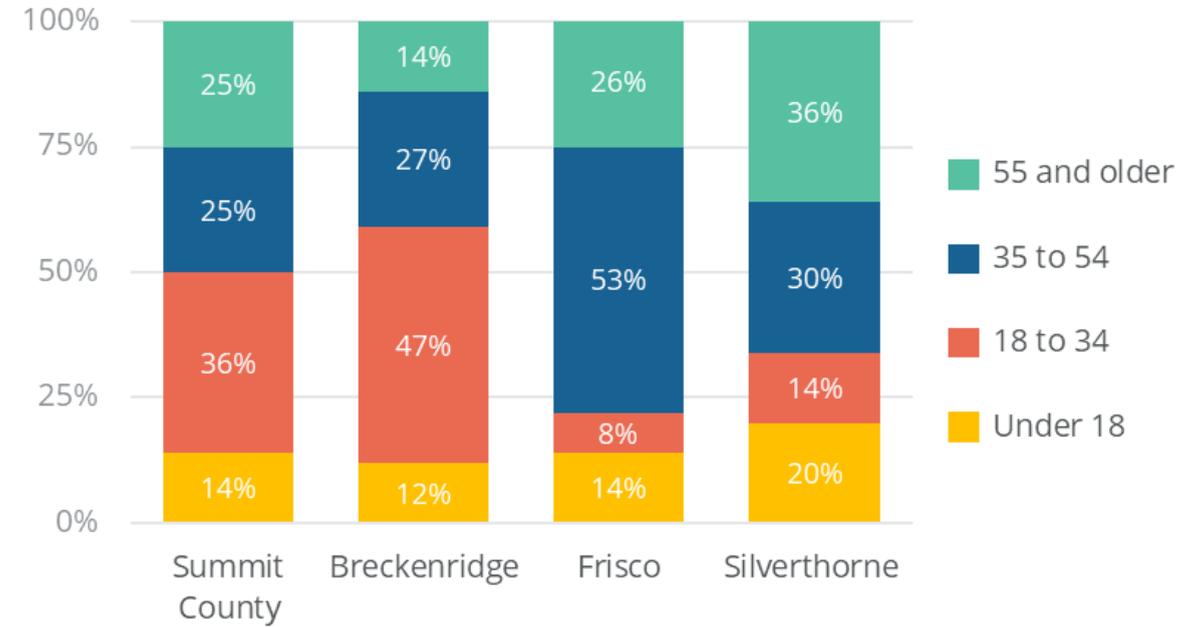
Children in Summit

Summit County is home to 4,367 total children (under 18):

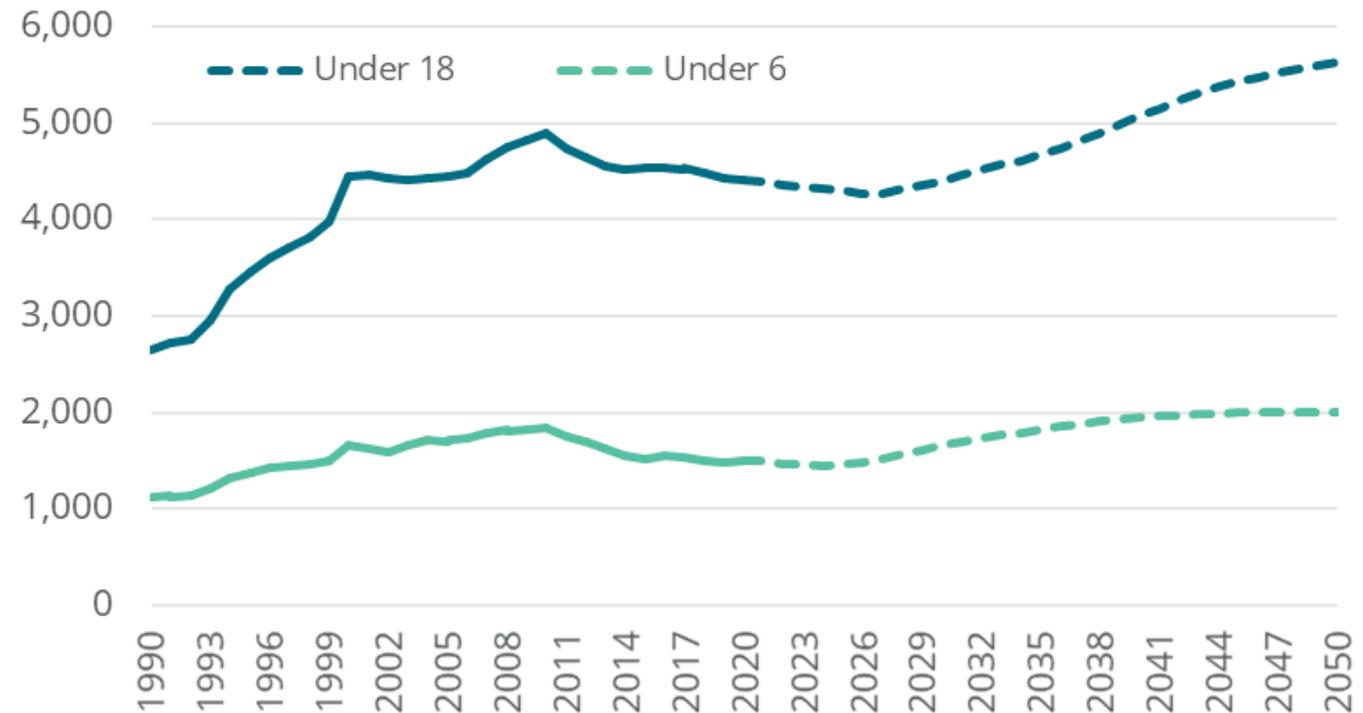
- **1,485** under 6; and
- **2,882** aged 6-12.

The state demographer forecasts an increase in the number of children in the county over the next 30 years.

AGE DISTRIBUTION, COMMUNITIES IN SUMMIT COUNTY



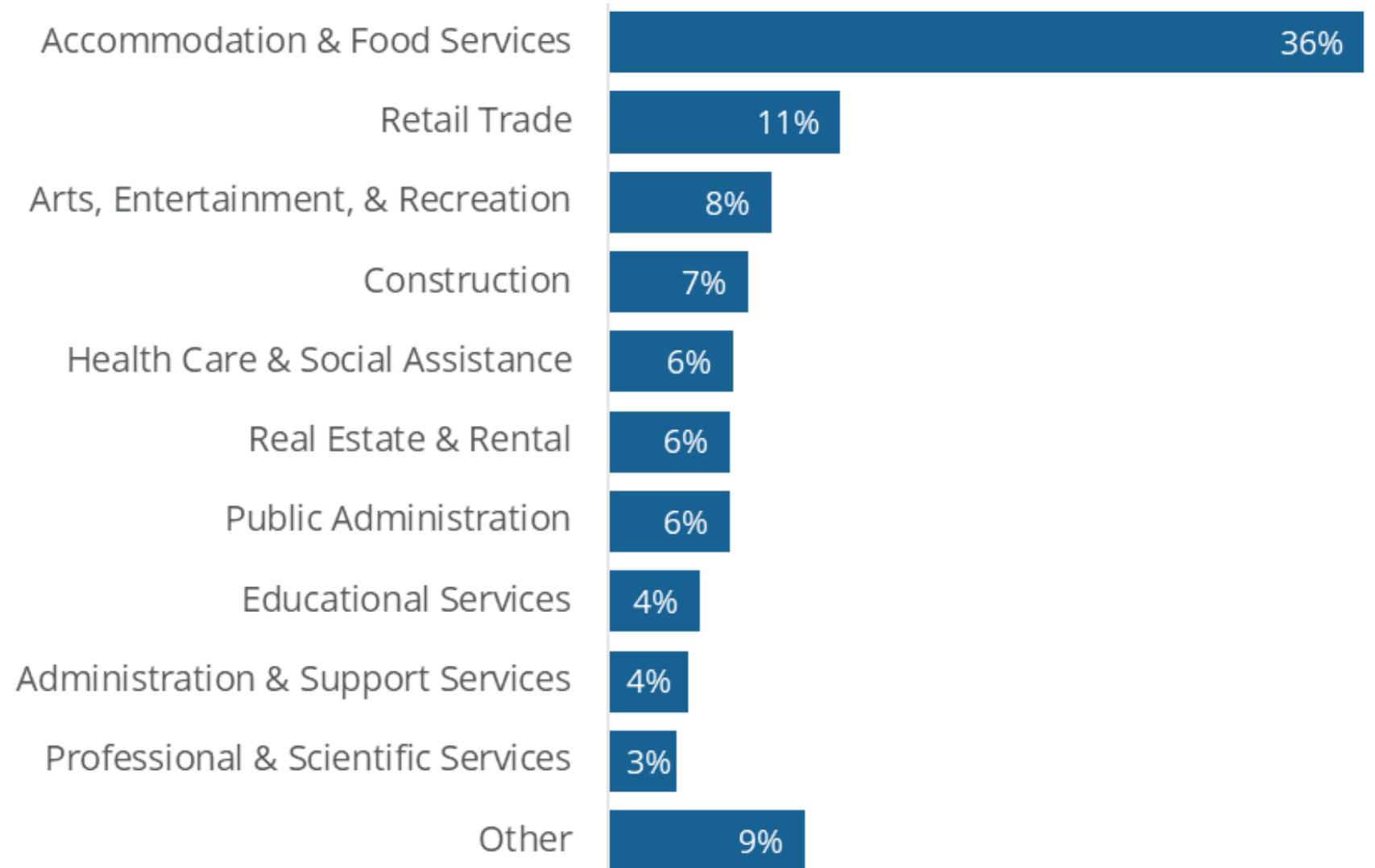
HISTORIC & FORECASTED POPULATION OF CHILDREN, SUMMIT COUNTY, 1990-2050



Labor Force and Childcare Impacts

73%

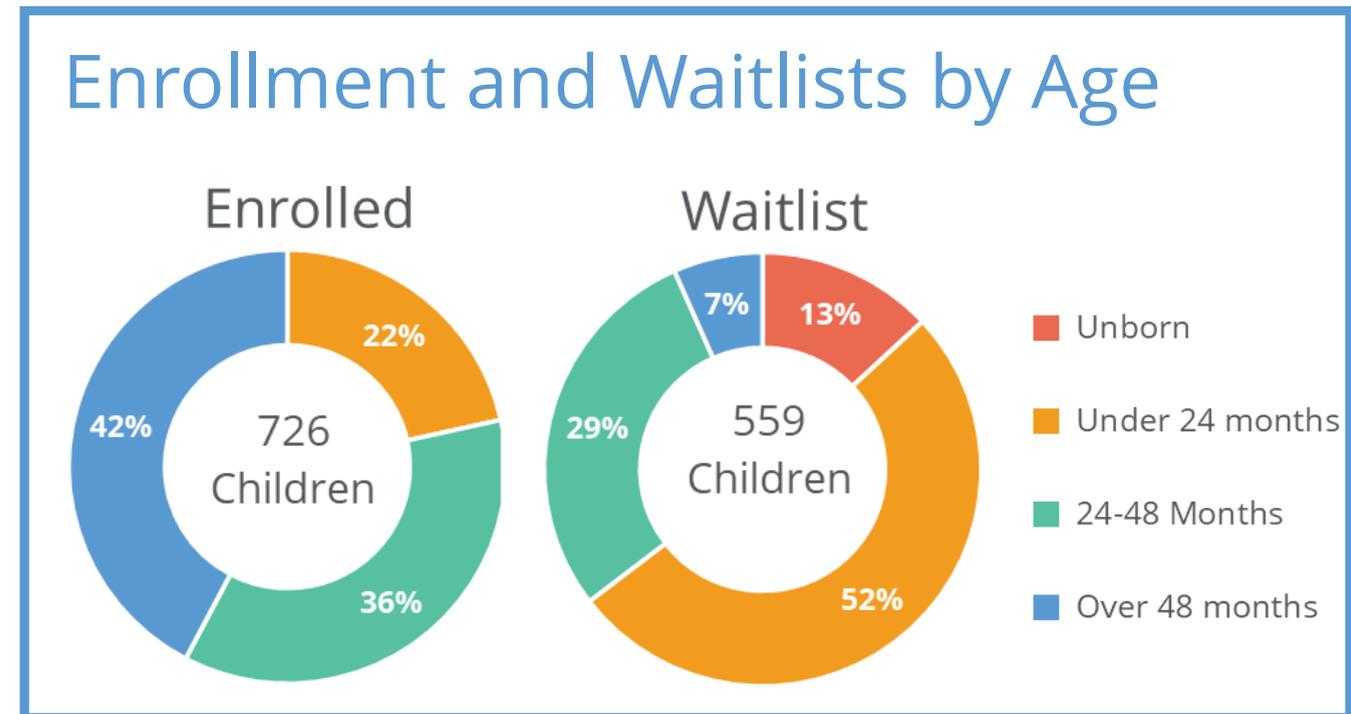
of children in Summit have all parents in the Labor Force



*Existing licensed providers can serve up to **661 children** daily.*

*Currently **726 children** are enrolled and another **559** are on a waitlist.*

| Provider Type | Num of Providers | Daily Capacity | Children Enrolled* |
|------------------|------------------|----------------|--------------------|
| Childcare Center | 8 | 400 | 437 |
| Public School | 5 | 150 | 130 |
| Family Care Home | 12 | 111 | 159 |
| TOTAL | 25 | 661 | 726 |



*Enrollment exceeds capacity due to scheduling (using care <5 days per week).

After-School Care Options

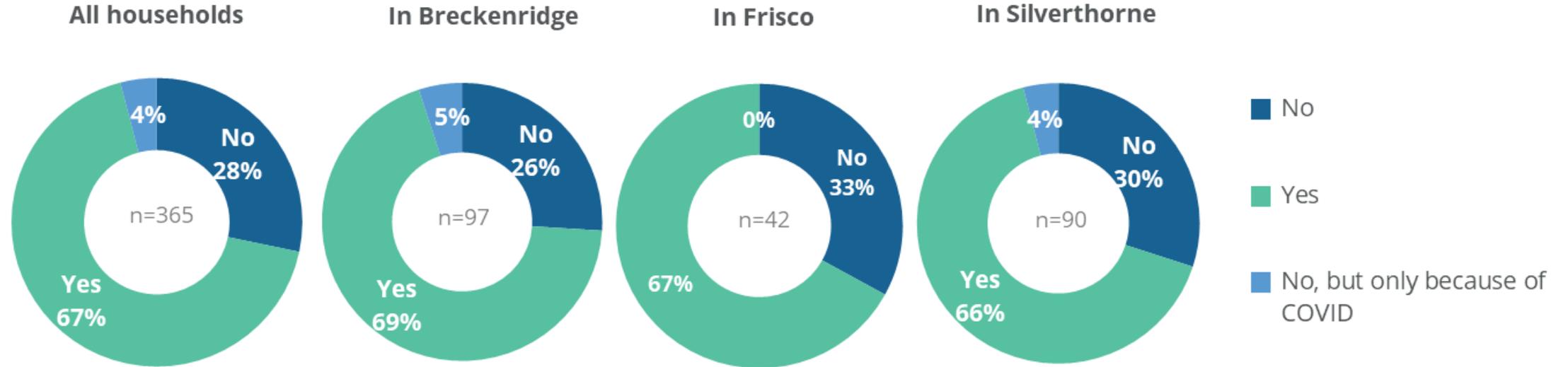
| Program Name/Operator | Location | Daily Capacity |
|----------------------------------|--------------------------------|----------------|
| Keystone Science School | Dillon Valley Elementary | 20 |
| Keystone Science School | Silverthorne Elementary | 20 |
| Keystone Science School | Frisco Elementary | 20 |
| Frisco Fun Club (Town of Frisco) | Frisco Community Center | 20-40 |
| Mountain Top Children's Museum | Mountain Top Children's Museum | 45 |
| Breckenridge Mountain Camp | Breckenridge Recreation Center | 100 |
| Lake Dillon Preschool | Lake Dillon Preschool | 20 |
| The Lake Dillon Theater Co. | Silverthorne Elementary | 20 |
| Total Daily Capacity | | 265-285 |

Total Capacity drops to
205
with loss of KSS
after-school
programs

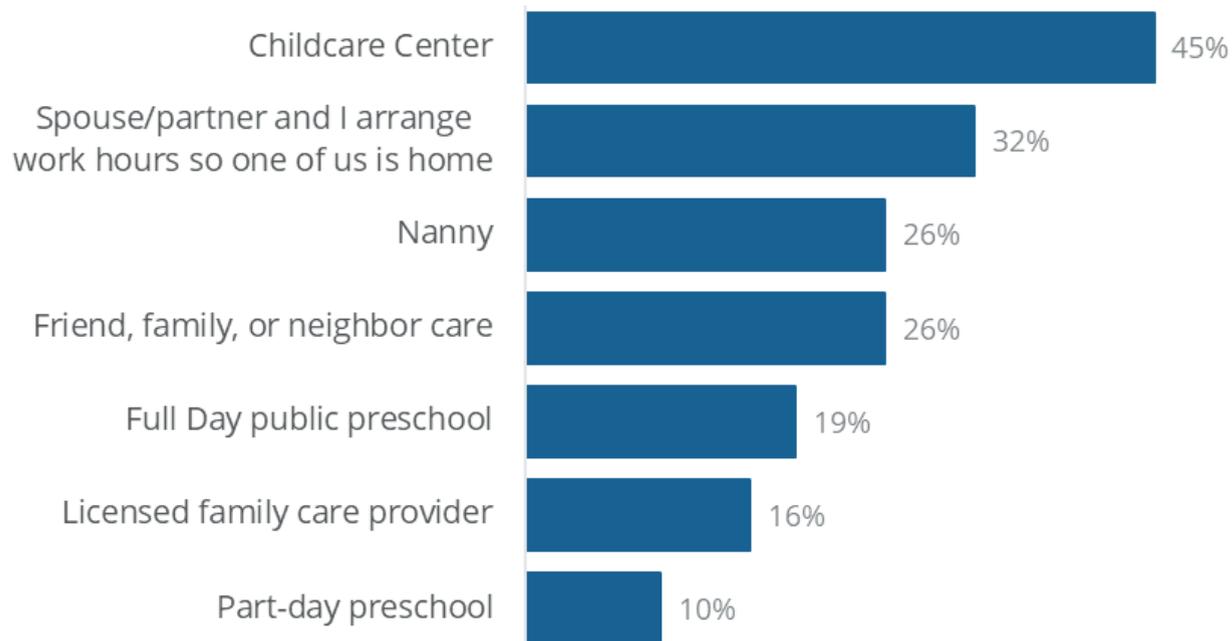
SURVEY RESULTS

PARENTS & GUARDIANS

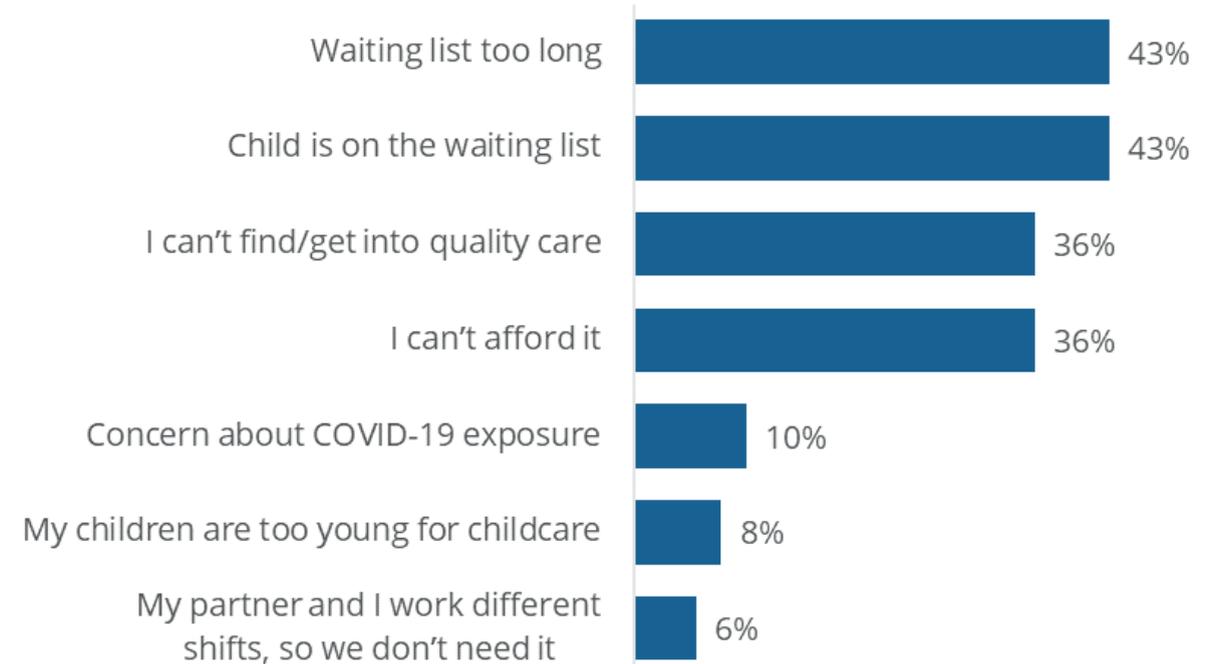
Are you regularly using any type of childcare (for child(ren) <6)?



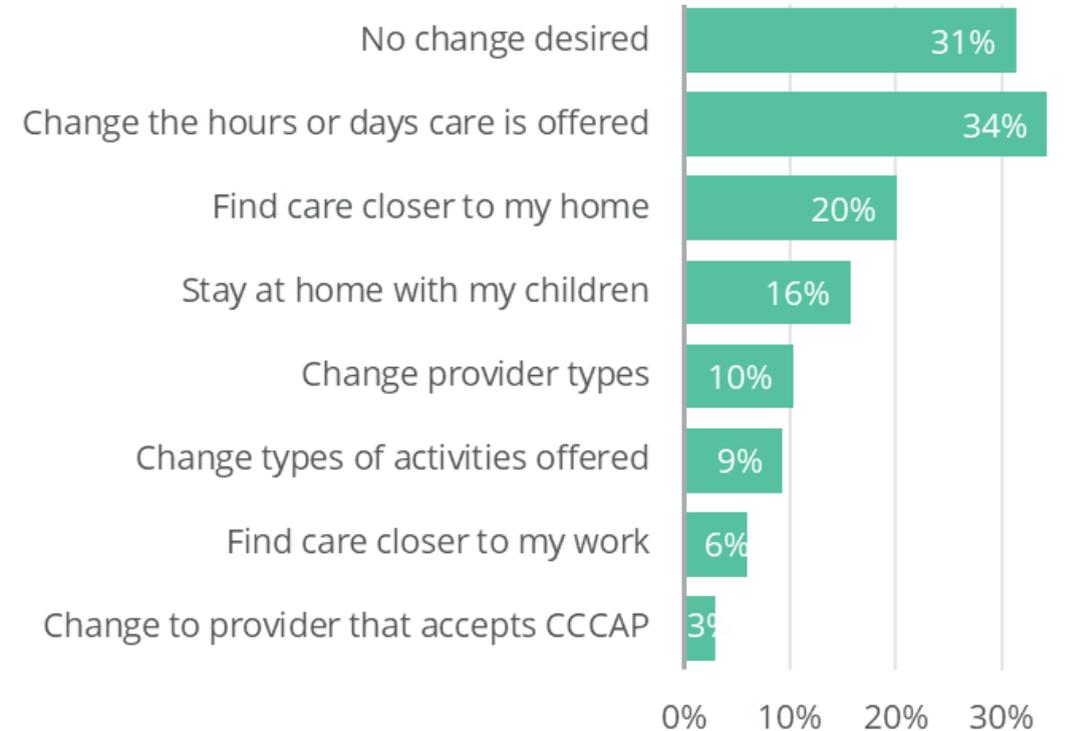
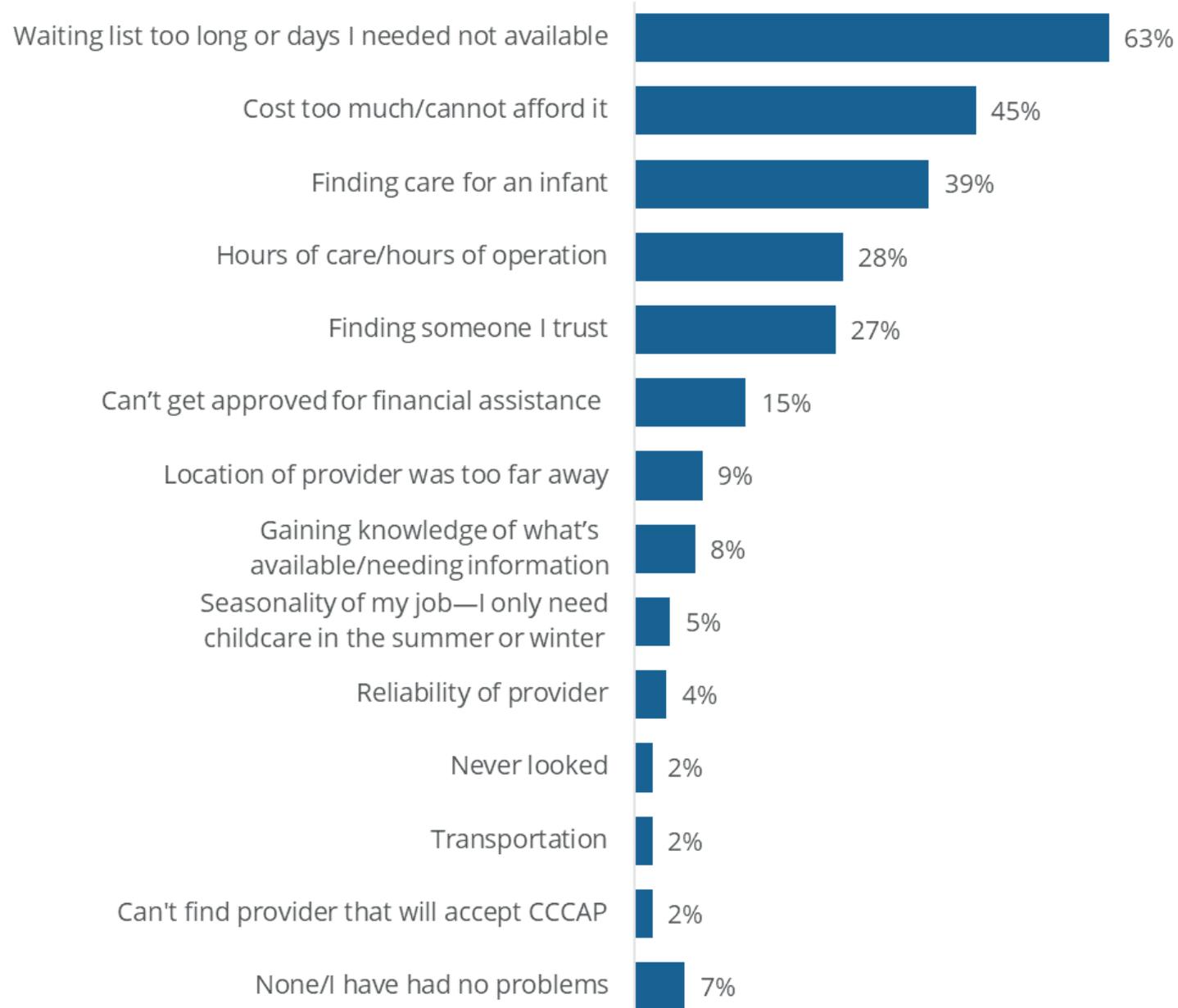
If yes, what type?



If no, why not?

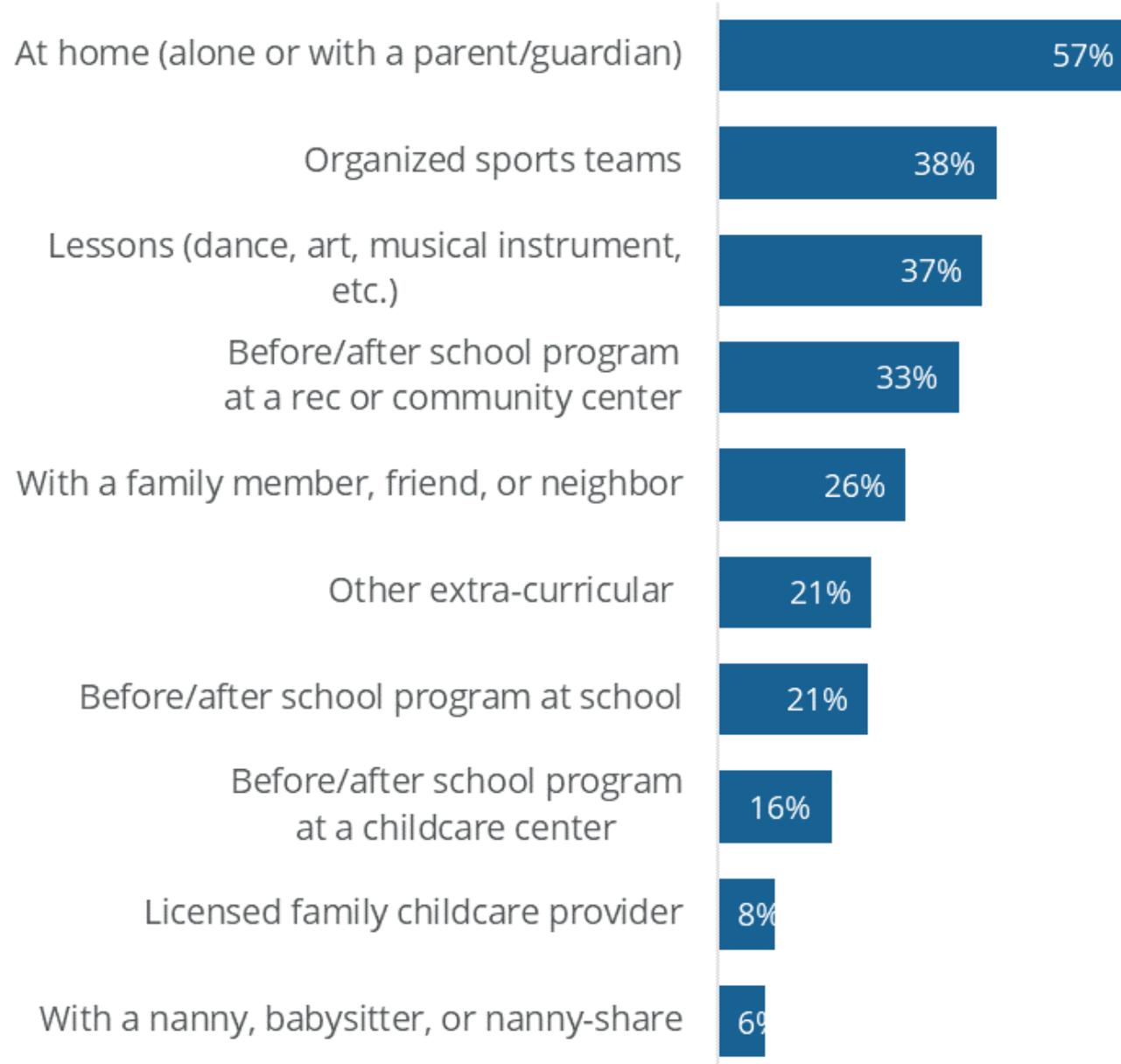


Challenges & Desired Changes



24% additional weekdays; 23% earlier morning hours; 21% weekend hours; 17% evening hours; 14% summer care; and 11% hourly drop-in care

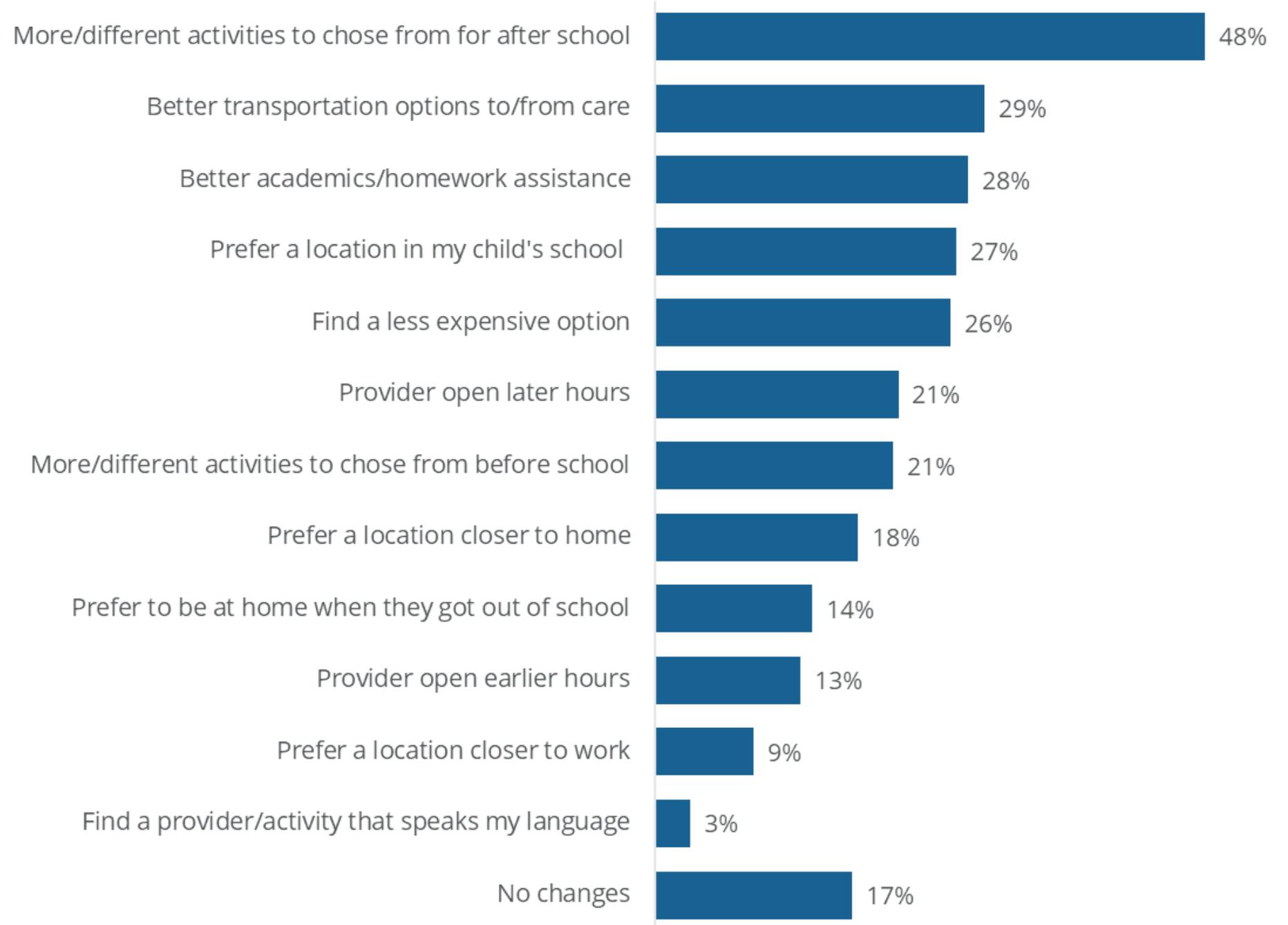
Before/After School Care Choices



Reasons for not using before/after care:

- Important to be with my kids
- Don't need it (work different shifts)
- Can't afford it
- Can't get in
- Nothing offered at my child's school
- Transportation

If you could change your typical before/after school care arrangements, you would...

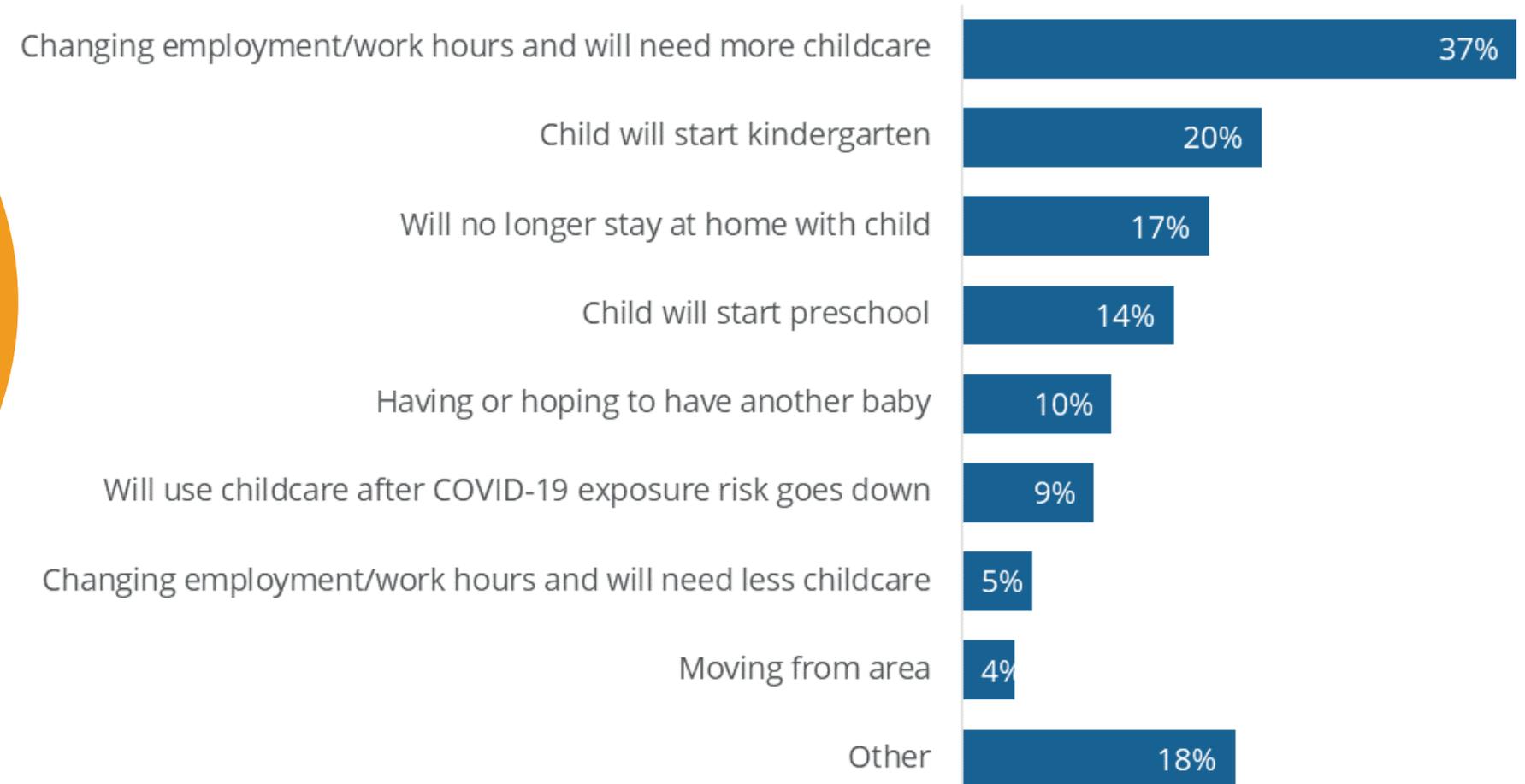


Changes to Childcare Needs—All Ages

45%

Of respondents
said their childcare
needs will change
next year

Why are your childcare needs likely to change in the next year?



PROVIDER
PERSPECTIVES
**INTERVIEWS & SURVEY
RESPONSE**

Early Childhood Care Provider Challenges

- Notable increase in demand—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.)

After-School Care Provider Challenges

- Strong demand, especially for site-based options (or those providing transportation)
- Staffing is a huge challenge
- Operation and funding barriers
- Need for more providers (so the few operators don't shoulder entire burden) and options
- Need for regional coordination, including with the school district and County.

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

-Summit County stakeholder

Questions?



ROOT POLICY
R E S E A R C H