STALLED AT THE START
VERMONT'S CHILD CARE CHALLENGE

An Analysis of the Supply of and Demand for Regulated Child Care for Children Birth through Five in Vermont

March 2024

Produced by Let's Grow Kids

Advised by Building Bright Futures, First Children's Finance – Vermont, and the Vermont Association for the Education of Young Children

About Let's Grow Kids

Let's Grow Kids is a nonprofit organization on a mission to ensure affordable access to high-quality child care for all Vermont families by 2025. With nearly 40,000 supporters, Let's Grow Kids, in partnership with Let's Grow Kids Action Network, is empowering Vermonters to advocate for sustainable child care policy change.

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About this Report

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Executive Summary

Since 2016, Let's Grow Kids, in partnership with a number of advisory organizations, has published the biannual *Stalled at the Start* report, which analyzes the supply of and demand for full-day, full-year, regulated child care (also referred to as early childhood education) for children birth to age five in Vermont. This year's report will be the last published by Let's Grow Kids as the analysis of the supply of and demand for child care transitions to other partners.

2024 Report Changes

To herald the transition of this analysis to other partners in the future and to consolidate information into one, go-to resource, the 2024 edition of *Stalled at the Start* includes some important changes:

- The inclusion of analyses of the supply of and demand for lead early childhood educators in Vermont in order to meet demand for child care (previously published by Let's Grow Kids in the *Access: The Need for More Early Childhood Educators in Vermont* report).
- A shift from analyzing the supply of and demand for high-quality full-day, full-year child care for infants, toddlers, and preschoolers likely to need care to just focusing on all full-day, full-year programs.
- Additional analysis on access to child care outside of typical business hours.
- Shift away from including county-specific fact sheets in the report. Historically, *Stalled at the Start* has included county-specific fact sheets as part of the report. Let's Grow Kids plans to share stand-alone, county-specific information sheets later in the year. All information that has been historically included in the county fact sheets is now available in table form directly in the main body of the report or in the Appendix.

2024 Report Context

Since the publication of the 2022 edition of *Stalled at the Start*, the country, and Vermont, have experienced significant changes—both challenges and opportunities—that have impacted the early childhood education system.

Challenges

- **Continued impacts from the COVID-19 pandemic**, including an exhausted early childhood education workforce,[1] staffing shortages,[2] changes in families' abilities to afford child care,[3] and continued rising costs for business operations.[4]
- **The end of American Rescue Plan Act stabilization funding for child care programs** in February, which helped to sustain child care, nationwide, through the worst of the pandemic.
- **Catastrophic flooding** in July impacted child care programs throughout the state, resulting in some temporary and permanent program closures.
- **Increasing demand, decreasing supply.** The percentage of young children likely to need access to child care increased significantly since the publication of the 2022 report, while the supply of full-day, full-year child care in Vermont declined.

Opportunities

- **The passage of Act 76**, which began making historic investments in Vermont's child care system in the fall of 2023. The state of Vermont will invest more than $125 million annually in the child care system. The data in this report was collected just after Act 76 was beginning to be implemented. While this report shows a decrease in capacity, the investments of Act 76 have tremendous promise to reverse this trend.
- **Continued investment in child care capacity development and business supports** helped to sustain child care programs throughout the state and supported the creation of hundreds of new child care slots throughout the state, keeping Vermont's decline in full-day, full-year child care capacity lower than national averages.[5,6,7]

Key Findings

Nationally, 30% of families found it harder to find child care over the past year than previously.[8] This report found that while Vermont has experienced some decline in child care capacity, Vermont's decline appears far less precipitous than national trends. This is likely thanks to critical supports like Vermont's Child Care Business Technical Assistance Program, the Make Way for Kids capacity development grant program, Vermont's Early Childhood Educator Student Loan Repayment Assistance Program, and other programs, as well as the promise of investments from Act 76.

Overall, Vermont experienced statistically significant increases in percentage of children, statewide and across all age groups, likely to need care without access to regulated, full-day, full-year options. This means that fewer children likely to need care have access to child care than in 2022. This is likely due to both an increase in demand and a decrease in supply. The unemployment rate in Vermont is one of the lowest rates in the nation, and the number of children with all available parents in the workforce is high.[9,10] Nationally, since February 2023, the labor force participation rate for prime-age women—those between the ages of 25 and 54—has exceeded its all-time high. The jump for mothers of young children has been particularly high and, among those who have a bachelor's degree, it's even higher.[11] These factors have contributed to an increase in demand reflected in this report. Inversely, the COVID-19 pandemic, the end of American Rescue Plan Stabilization Grants, and catastrophic flooding contributed to a statewide decrease in the supply of child care programs.

At the county level, this decline translated to many counties experiencing statistically significant increases in the percent of children likely to need care without access to regulated, full-day, full-year child care (meaning fewer children likely to need care have access). For infants, most counties experienced no statistically significant change. For toddlers, half of counties experienced statistically significant increases (which means fewer toddlers likely to need care have access). Lastly, for preschoolers, more than half of counties in Vermont experienced statistically significant increases (meaning fewer preschoolers likely to need care have access). Only one county, Bennington, experienced a statistically significant decrease in the percentage of toddlers and preschoolers likely to need care without access to full-day, full-year regulated programs (which means more toddlers and preschoolers likely to need care have access).

Introduction

The 2024 edition of *Stalled at the* Start comes at an important time for Vermont's early childhood education system. In February 2023, American Rescue Plan stabilization funding for child care programs ended in Vermont. This funding sustained Vermont child care programs through the worst of the COVID-19 pandemic. Stabilization grants were used to temporarily pay higher wages through bonuses and stipends, support benefits like health insurance, and cover non-labor operating expenses such as rent, mortgage, utilities, and supplies. In February 2023, a survey of Vermont child care programs found that 7% could stay in business six months or fewer if current business conditions persisted.[12] Early projections estimated that approximately 366 child care programs would close in Vermont and 11,766 children would lose access to child care when this funding ended.[13] Around this time, Vermont also experienced catastrophic flooding that devasted communities and impacted child care programs across the state. Fortunately, in the summer of 2023, the Vermont Legislature overrode a veto from Governor Phil Scott to pass Act 76, a historic child care bill that will invest more than $125 million annually in Vermont's child care system.[14] This investment boosted the optimism of Vermont's early childhood education workforce about the sustainability of the field.[15] The child care data used for the analysis for *Stalled at the Start* is pulled every year on September 30. For this year's report, this means the data was collected prior to significant investments from Act 76 going into effect, meaning that the 2024 edition of *Stalled at the Start* can serve as an excellent baseline against which progress achieved through Act 76's financial and programmatic investments can be measured.

Overview of Vermont's Early Childhood Education System

Science tells us that the first five years of a child's life are the most important for healthy brain development. It's a time when the brain is creating its foundation for learning and development, forming more than one million new neural connections every second.[16]

For families balancing work and children or for families seeking social, emotional, or cognitive development opportunities outside their home, early childhood education programs can offer the nurturing care, quality early childhood education experiences, and safe environment that support optimal healthy development for young children.

Types of Regulated Early Childhood Education Programs

Vermont families rely on different ways to care for their infants, toddlers, and preschoolers. Many families choose to use regulated early care and education programs as part of the care arrangements for their child or children. Before the pandemic, researchers found that four out of five Vermont families use some type of child care on a regular basis.[17] Regulated programs have gone through a licensing process with the Vermont Department for Children and Families Child Development Division (CDD). The licensing process requires programs to meet certain health and safety regulations and programming guidelines, such as developmentally appropriate play time and other activities that promote healthy development. The licensing process also requires the state to inspect programs to make sure they provide a safe and age-appropriate space and meet other regulations and guidelines for child care and early childhood education.

In Vermont, there are three different types of regulated programs that can provide child care for infants, toddlers, and/or preschoolers:[18]

- **Registered Family Child Care Homes (Registered FCCHs):** Also known as family providers or home-based providers, registered FCCHs provide early care and education programs in the early childhood educator's own home for children from more than two families. These home-based providers have gone through a licensing process with CDD to certify that they meet specific regulations that promote children's health, safety, and development in order to care for a small group of children. Registered FCCHs are the most common type of regulated, home-based child care in Vermont.
- **Licensed Family Child Care Homes (Licensed FCCHs):** As with registered FCCHs, licensed FCCHs offer a regulated home-based option for child care. The difference between registered FCCHs and licensed FCCHs is that licensed FCCHs typically care for more than six children with the support of an assistant. Like registered FCCHs, licensed FCCHs have received a license with CDD to certify that they meet specific regulations that promote children's health, safety, and development. Since licensed FCCHs care for more children than registered FCCHs, they must meet additional regulations.
- **Licensed Center-Based Child Care and Preschool Programs (CBCCPPs):** Licensed CBCCPPs care for children in a dedicated space that is not located in a home. These programs are also regulated by the state and have two or more staff who have specific training or formal education in early childhood care and education. Licensed child care centers offer many different types of programs, and may focus on a particular age group, such as preschool.

Access

According to the U.S. Department of Health & Human Services Administration for Children and Families Office of Planning, Research & Evaluation (OPRE), access to early care and education programs is defined as, "parents, with reasonable effort and affordability, can enroll their child in an arrangement that supports the child's development and meets the parents' need."[19] OPRE notes that this encompasses factors such as the geographic location of a program, program quality, hours and days care is available, transportation, and linkages to other services like speech therapy through the child care or early learning program. Ultimately, OPRE has defined access to early care and education through a holistic lens that looks at what works best for a child and the child's family.

In *Stalled at the Start*, we analyze the number of child care slots in regulated programs for given age groups as compared to the number of children in an age group who are likely to need access to child care and determine the slot gap between current supply and estimated demand. We also provide information on the time the first child care program opens, the time most programs open, the time most programs close, and the time the last program closes in each county.

An additional factor in thinking about access is the availability of qualified early childhood educators who staff child care and early learning programs. Access cannot be created without qualified early childhood educators. They are the ones who ensure that children enrolled in early childhood education receive safe, developmentally-appropriate, play-based, nurturing early care

and education opportunities. Using the findings regarding the estimated number of new slots that need to be created in Vermont in order to meet demand, Let's Grow Kids conducted additional analysis to estimate the number of early childhood educators needed in order to realize the estimated additional supply of child care slots. In 2020, Let's Grow Kids published this analysis on the additional early childhood educators needed to meet demand as a separate report called *Access: The Need for More Early Childhood Educators.*[20] In 2024, Let's Grow Kids has consolidated the *Access* and *Stalled at the Start* analyses into one report that covers the supply of and the demand for child care and lead early childhood educators.

Affordability

Another key piece of the OPRE research brief that defines access is the topic of affordability. Even with financial assistance, Vermont families can spend almost 30% of their annual income on child care.[21] In contrast, the U.S. Department of Health and Human Services' Administration for Children and Families recommends that families spend no more than 7% of their annual income on child care.[22] That leaves a significant gap between what the federal government considers to be affordable and what families are actually paying for child care in Vermont.

Affordability is also an issue for early childhood educators. Vermont, like many other states, has been working to advance the quality of child care and early learning by supporting early childhood educators in advancing their skills and education. For example, a teacher in a center-based child care program must hold advanced training in early childhood education through a teaching license through the Vermont Agency of Education with an endorsement in a field related to early childhood; or 12 months of experience working with young children combined with a bachelor's degree specifically relevant to early childhood or a bachelor's degree with extensive coursework in early childhood or school age education.[23] However, the average annual salary for such a teacher is $39,280 (or $17.55 per hour), which is far lower than the average salary of $54,770 for a Vermont kindergarten teacher.[24,25] This can make it difficult for early childhood educators to remain in the field.

The following analysis does not include considerations related to affordability, but Let's Grow Kids recognizes the important role that costs for both parents and early childhood educators play in Vermont's child care and early childhood education system.

Estimating the Supply of and Demand for Regulated Child Care in Vermont

In partnership with Building Bright Futures, First Children's Finance, and the Vermont Association for the Education of Young Children, Let's Grow Kids updated its analysis of the supply of and demand for regulated child care in Vermont using a methodology that is detailed in the methodology section of this report.

Determining Demand

This report focuses on the supply of and demand for child care for three different age groups: infants, toddlers, and preschoolers. These age groups are defined by state and federal regulations that guide Vermont's early care and education system. Each of these age groups have different developmental and physical needs, which influence how many children in each age group a program is able to serve.

Infants

Infants—children between six weeks and 23 months—require the most attention, support, and one-on-one care of all three age groups. They are experiencing rapid developmental and emotional growth, making things like one-on-one attention, physical closeness and nurturing, and caregiver continuity important in any program serving this age group.[26] Additionally, infants need significant physical support, such as diapering, feeding, and monitored nap time. To best meet these needs, caring for infants requires a low child-to-staff ratio, making them the most expensive early childhood age group to care for. Given the cost of providing quality infant care, many programs have capacity for only a few infants.

Toddlers

Toddlers—children ages 24 through 35 months—like infants, also require a significant amount of physical care and support. During this developmental stage, children are rapidly discovering, learning, and absorbing new knowledge from their environments.[27] For toddlers, being read to, spoken to, and given engaging and safe care and learning environments are necessary features of an early care and education program. Toddlers also require a low staff-to-child ratio to support their developmental and physical needs.

Preschoolers

Preschoolers—three- and four-year-olds—require less one-on-one attention than infants or toddlers. Their early care and education needs include developmentally appropriate play; open-ended and problem-solving activities; interaction and engagement with other peers for social and cooperative competence building; and environments that are rich in language, literacy, and mathematics modeling.[28]

Based on these age group definitions, the total population for each age group was calculated using data from the Vermont Department of Health.[29] However, we recognize that not every family in Vermont uses or wants to use regulated child care. In order to estimate the demand for child care, the analysis uses a proxy: children likely to need care (LTNC).

The LTNC population was identified using the population estimates for each age group and information from the U.S. Census Bureau on the percent of Vermont children ages five and under with all available parents in the labor force.[30] More information on the validation of this approach can be found in the methodology section of this report.

Determining Supply

This study focuses on regulated early childhood education programs in Vermont. Regulated programs that serve infants, toddlers, and/or preschoolers include registered FCCHs, licensed FCCHs, and CBCCPPs. CDD maintains information on all regulated programs in the state, including information on a program's desired capacity for children in each age group the program serves as well as the days of the week and usual hours a program is open.[31] This data was used to determine which regulated programs in Vermont offer full-time (at least 8 hours per day), full-year (at least 48 weeks per year) child care for infants, toddlers, and/or preschool-age children in order to analyze the supply of child care.

Table 1. Number of Regulated Child Care Programs in Vermont Offering Full-Day, Full-Year Child Care for Infants, Toddlers, and/or Preschoolers, 2024

County	CBCCP	Licensed FCCH	Registered FCCH	Total
Addison	13	2	23	**38**
Bennington	18	1	17	**36**
Caledonia	13	1	28	**42**
Chittenden	77	2	49	**128**
Essex	0	0	5	**5**
Franklin	12	0	47	**59**
Grand Isle	3	0	2	**5**
Lamoille	8	0	11	**19**
Orange	9	2	13	**24**
Orleans	6	3	35	**44**
Rutland	17	3	27	**47**
Washington	16	3	34	**53**
Windham	16	3	7	**26**
Windsor	20	0	24	**44**
Total	**228**	**20**	**322**	**570**

What We Learned: Statewide Information

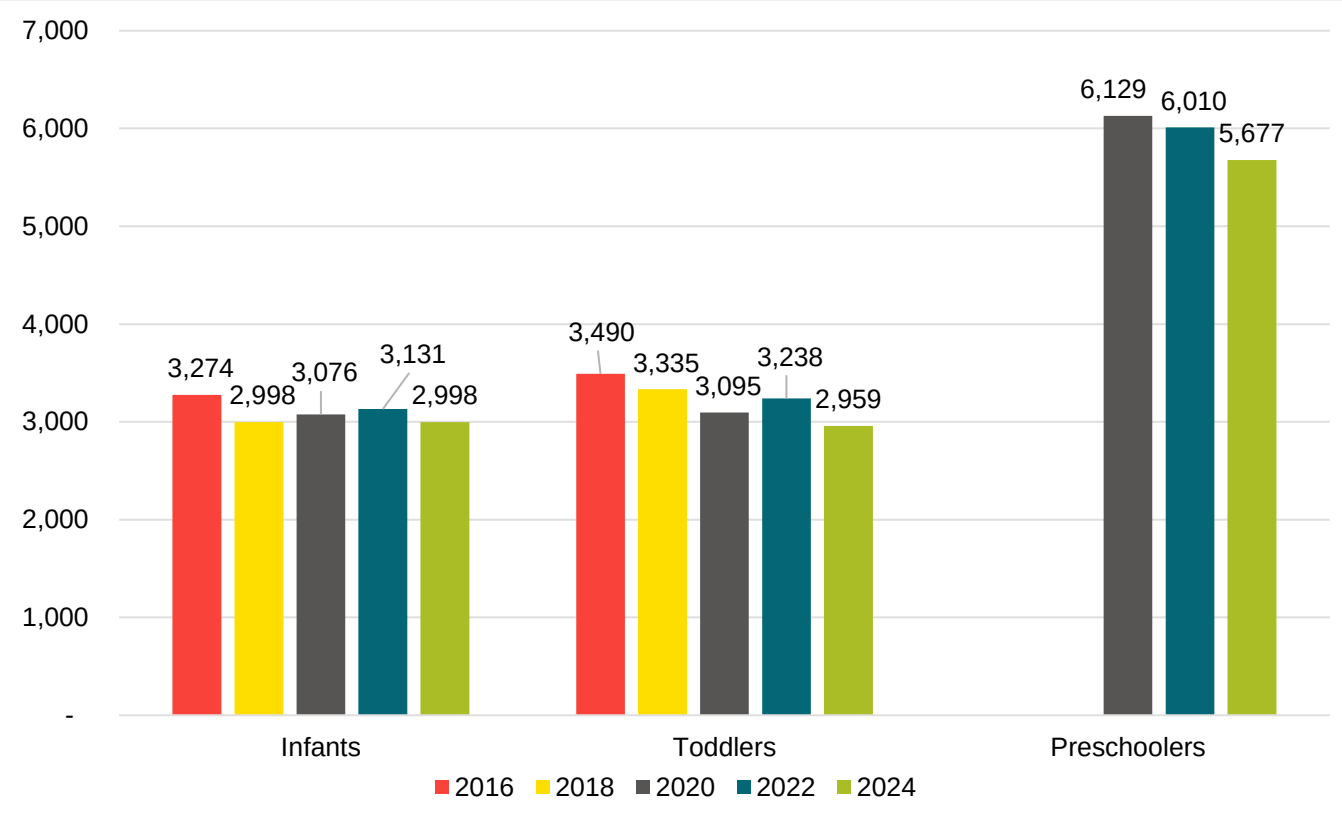
The Supply

Over the course of the first three editions of *Stalled at the Start*, full-day, full-year child care capacity generally declined. In the 2022 report, capacity increased slightly for infants and toddlers. This increase was likely due to increased, strategic state and philanthropic investment in early childhood education program capacity development through the Make Way for Kids program, originally administered by Let's Grow Kids and now managed by First Children's Finance. The program supported the development of new early childhood education programs. Additionally, federal investments targeted specifically at the early childhood education system through the Coronavirus Response and Relief Supplemental Appropriation Act and the American Rescue Plan Act may have also played a role in sustaining or expanding capacity.

Since the 2022 report, full-day, full-year capacity has decreased for infants, toddlers, and preschoolers. There are currently 2,998 infant slots and 2,959 toddler slots in regulated child care programs, and 5,677 slots for preschoolers in regulated programs. Extenuating circumstances since the release of the 2020 report—including a global pandemic, increased inflation, and a decrease in the labor force—would likely indicate that there would be a decrease in child care program capacity.

The largest decline can be seen in regulated FCCHs. In the 2022 report, there were approximately 411 full-year, full day registered FCCHs. In this year's report, we found that there are approximately 322 full-year, full day registered FCCHs. This represents a 22% decline in the number of full-year, full day registered FCCHs. This aligns with the findings of CDD's report on Vermont's early childhood workforce. CDD also found a 22% decline in the number of people working in FCCHs.[32]

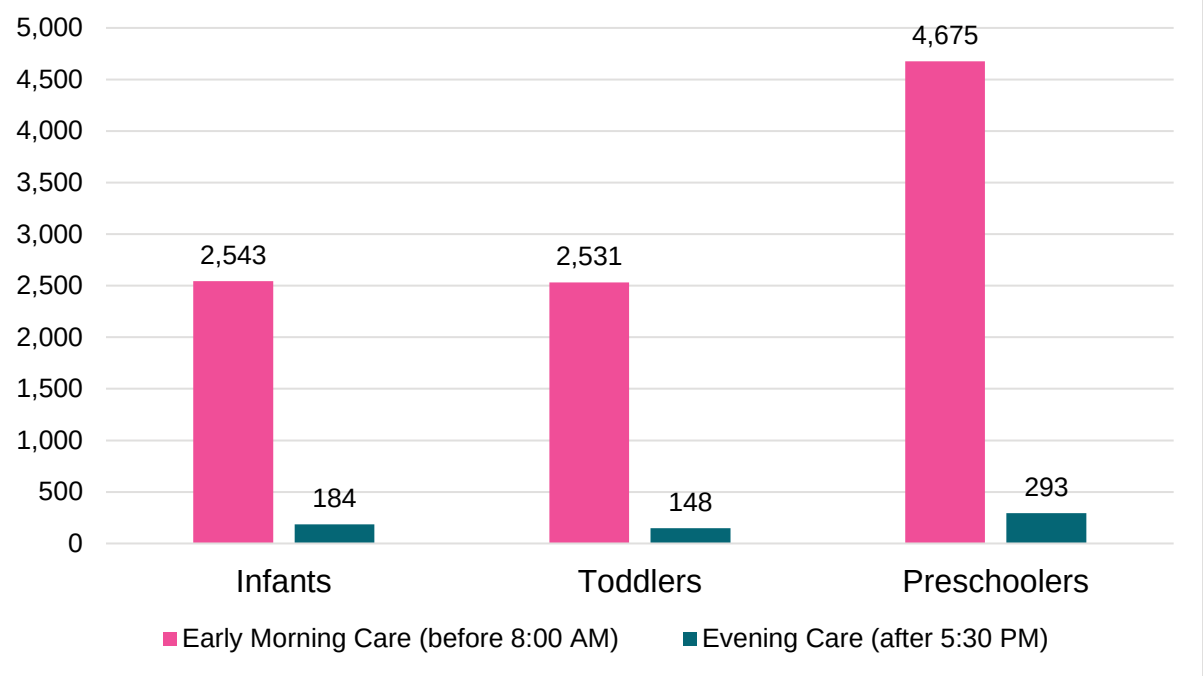
Figure 1. Change in Capacity of Regulated Early Care and Education Programs in Vermont, 2016–2024* [33, 34, 35, 36,37]



In our analysis of the supply of full-year, full day regulated child care programs, we examine the opening and closing times of each program. This year, we took a closer look at the programs that offer non-traditional hours of care—defined here as any care outside of 8:00 AM and 5:30 PM. Our findings show that many Vermont programs offer and provide early morning care (before 8:00 AM), however, few programs offer and provide evening care (after 5:30 PM). We found that 503 programs offer early morning care and 30 programs offer evening care. Four counties have no evening care slots available. This translates to 9,749 early morning care slots and 625 evening care slots available statewide. See appendix for more details.

* The data in the tables and figures in this report are reported in relation to the year the report was released and not in terms of the data set used for the analysis. More information on the data and the methodology can be found in the methodology section of this report. References to the previous four editions of *Stalled at the Start* are noted in Figure 1, but all figures and tables that cite 2016, 2018, 2020, or 2022 report data are also based on these references. Additionally, because this is only the third year that we are including an analysis of child care for preschoolers, only three years' worth of data are included for the preschool age group.

Figure 2. Non-Traditional Hours of Care Slots, 2024



The Demand

According to the latest population estimates from the Vermont Department of Health, there are 28,997 children under the age of five in Vermont (infants, toddlers, and preschoolers).[38] However, we know that not all of these children are likely to need full-time child care. The U.S. Census Bureau collects information on children ages five and under who have all available parents in the labor force (if a child lives in a family with two parents, this means that both parents work or are looking for work; if a child lives in a single-parent household, it means that the child's parent works). According to the latest information, 76.7% of Vermont children ages five and under have all available parents in the labor force.[39] This means that 22,249 children under the age of five are likely to need some form of regular child care (LTNC) while a parent works.

Since the first *Stalled at the Start* report, demand has increased with each report. With the onset of the COVID-19 pandemic, employment practices and trends fundamentally changed the ways in which we work. Last year, the national labor force participation rate for prime-age women (women most likely to be mothers) exceeded its all-time high, with the jump for mothers of young children being particularly high.[40] Furthermore, more people are working remotely with a recent Gallup poll showing that eight in 10 remote-capable employees expect to work hybrid or fully remote.[41] This shift to remote work impacts the hours of care families need for their children. While not all families are currently seeking full-time child care due to more flexible work schedules, research has shown that more Vermont families are seeking formal child care arrangements now than before the pandemic.[42]

Figures 3, 4, and 5 show how the LTNC population for each age group has changed since the first edition of this report. County-specific population information is available in the Appendix.

Figure 3. Vermont's Infant LTNC Population, 2016–2024

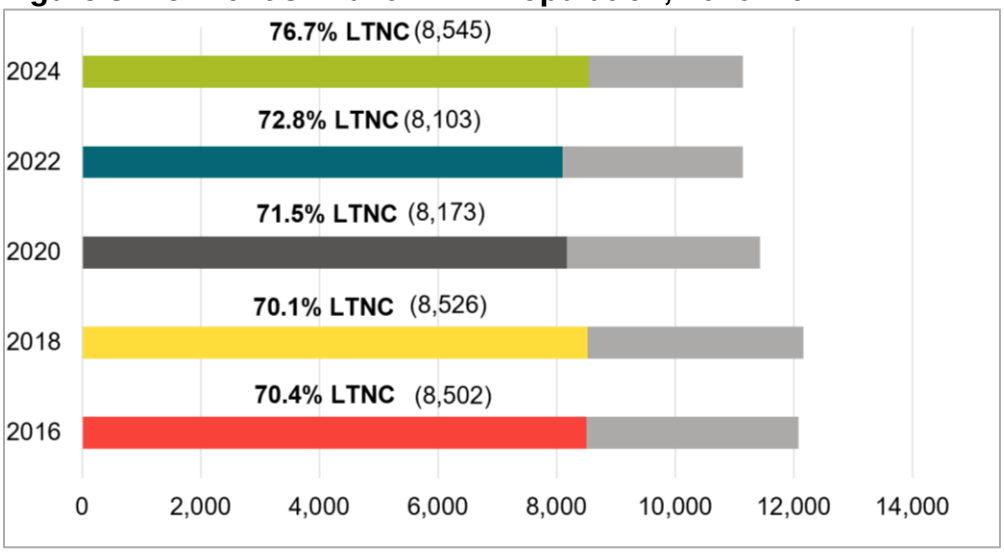


Figure 4. Vermont's Toddler Population, 2016–2024

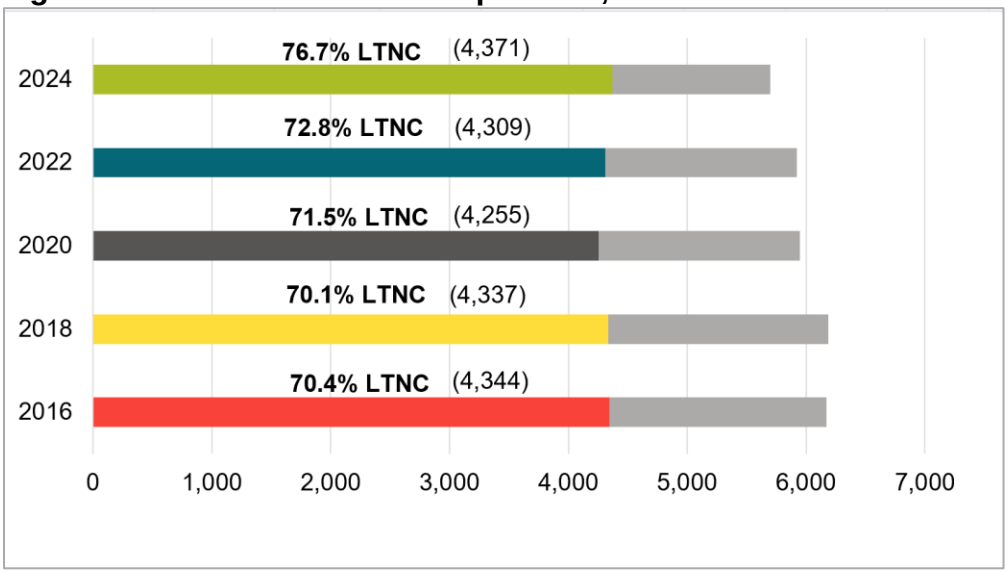
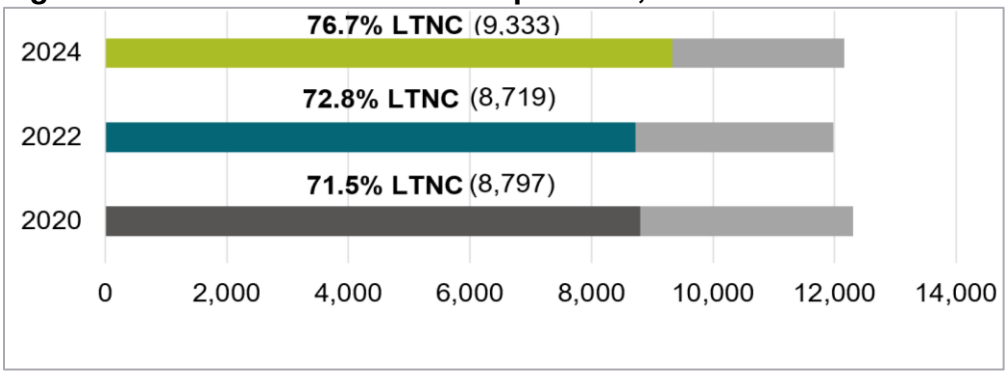


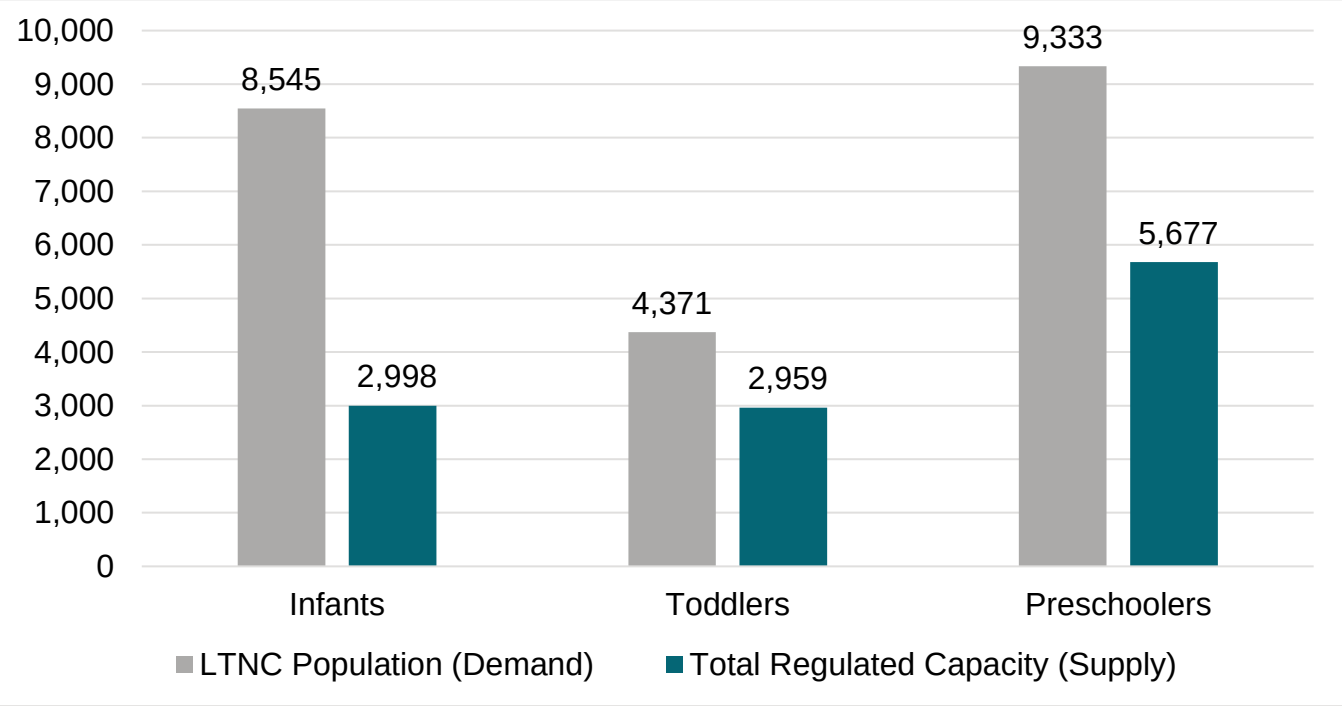
Figure 5. Vermont's Preschool Population, 2020–2024



Comparing Supply vs Demand

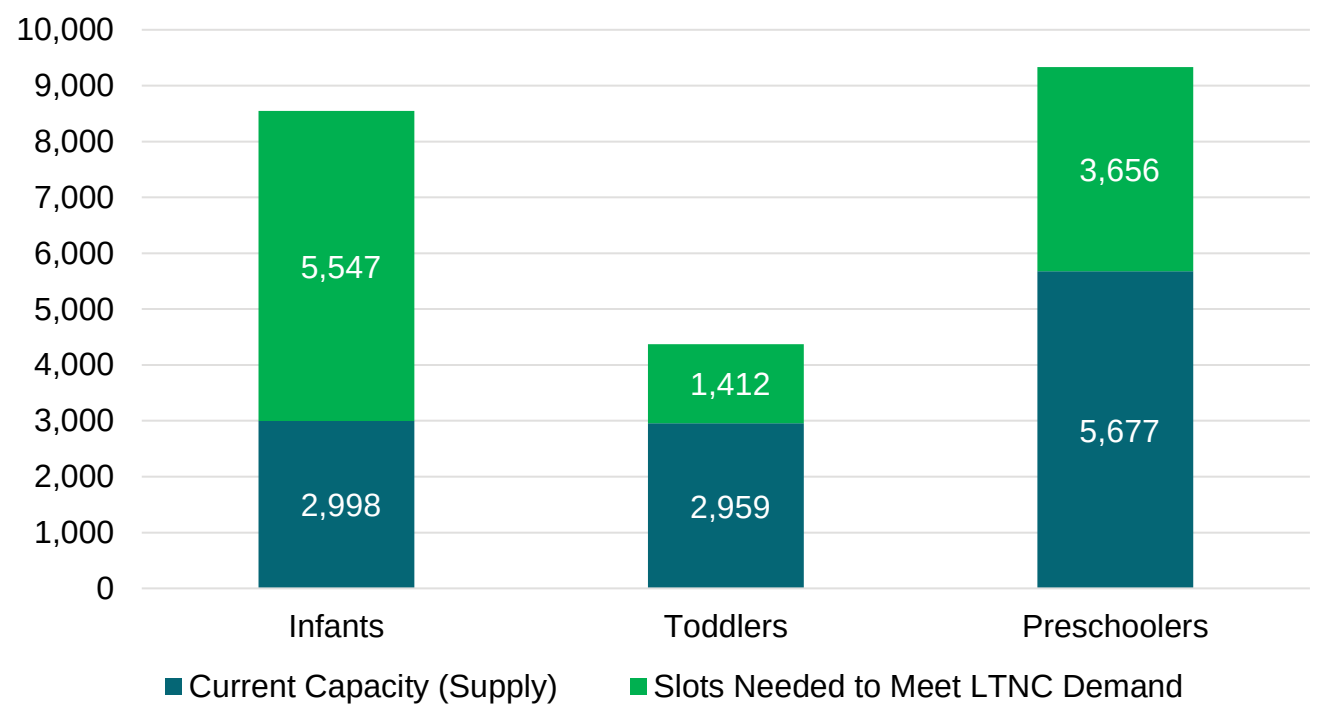
When the supply and demand information is compared, the difference between the two values is stark. Vermont does not have sufficient regulated early childhood education options statewide to meet the needs of infants, toddlers, or preschoolers LTNC, as shown in Figure 6.

Figure 6. LTNC Population (Demand) Compared to the Capacity of Regulated Programs (Supply), 2024



In order to meet demand, approximately 10,615 slots would need to be added to the system, of which 5,547 would need to be for infants, as shown in Figure 7. Information on the number of slots needed to meet demand is available in the Appendix.

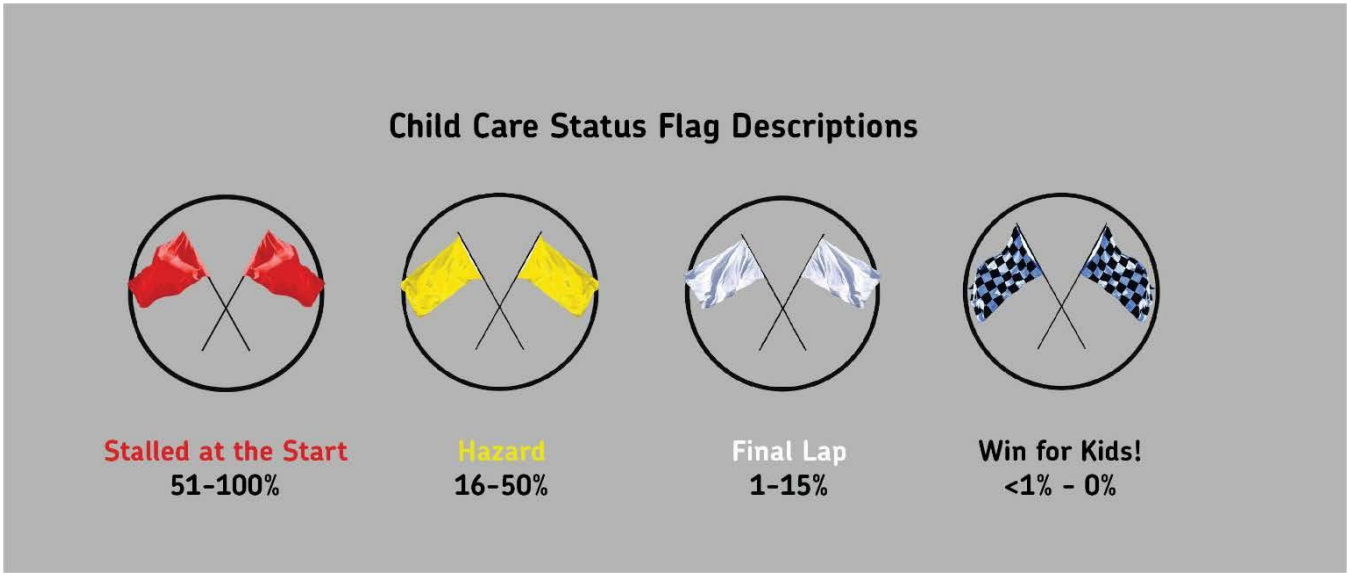
Figure 7. Capacity (Supply) Needed to Meet Demand, 2024



As noted in the methodology section, this estimate is likely to be an overestimation of the capacity needed to sufficiently meet demand, but it provides a guide point for early childhood education capacity development in Vermont.

Access to Care

When Let's Grow Kids developed the first *Stalled at the Start* report in 2016, the report included a visual indicator—a set of racing flags—to track changes in the percent of young children LTNC **without access** to regulated programs. These flags are based on those used in several different sporting fields to indicate important information to participants and spectators. For the purposes of *Stalled at the Start*, the flag and color symbols used provide a quick visual indicator of whether the state or a given county faces a shortage of regulated child care to meet the needs of young children LTNC.



In this section, maps are color coded based on colors of the flags. In the appendix, counties are color coded based on the colors of the flags within the table to indicate whether a given county faces a shortage of regulated child care to meet the needs of the LTNC population.

Additionally, this report includes information on whether changes in data between the release of the 2022 report and this report were statistically significant (whether the change was or was not likely to have happened by chance). If it was found that a change between 2022 report findings and 2024 report findings was statistically significant (meaning that it was **not likely** the change could have happened by chance), the change is marked either as more children having access or fewer children having access. If it was found that a change between the 2022 and 2024 report findings was not statistically significant (meaning that it **was** likely the change could have happened by chance), the change is marked as no significant change.

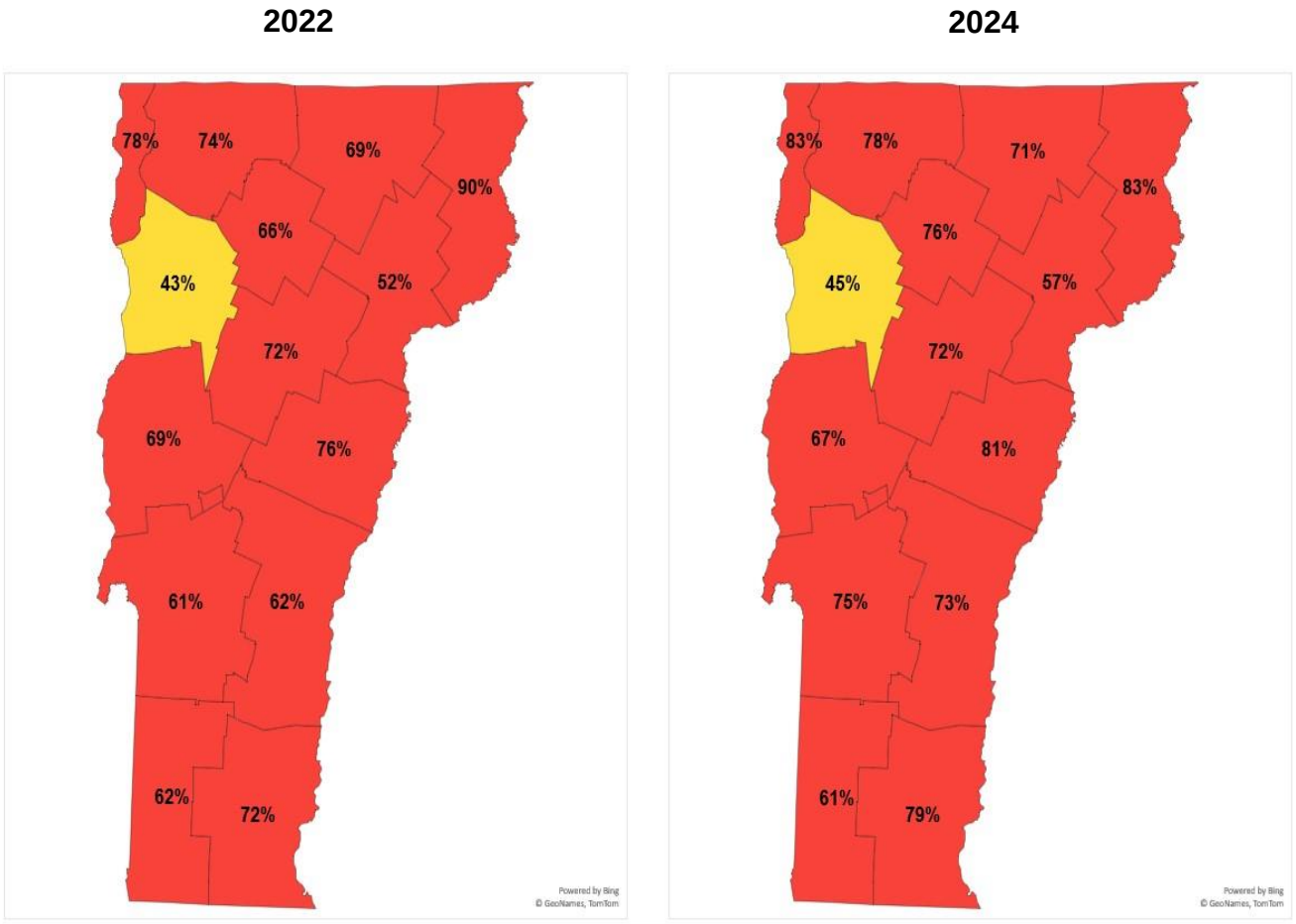
Detailed information on supply and demand and the statistical significance of changes between the 2022 report and 2024 report findings for all age groups can be found in the appendix.

Infants

This year's analysis showed that statewide, **65% of infants LTNC do not have access to regulated early care and education programs**. That's approximately three out of every five infants LTNC in Vermont. Comparatively, in 2022, 61% of infants LTNC did not have access to regulated programs. This is a significant change and suggests that statewide, fewer infants have access to regulated early childhood education than did previously.

At the county level, the percent of infants LTNC without access to a slot in a regulated program ranged from 45% to 83% as shown in Figure 8. Despite statewide setbacks, most counties did not experience a statistically significant change in the percent of infants LTNC without access to regulated programs since the 2022 report. The analysis showed that four counties had statistically significant increases in the percent of infants LTNC without access to regulated programs. In Lamoille, Rutland, Windham, and Windsor counties, fewer infants have access to regulated programs.

Figure 8. Infants LTNC Without Access to Regulated Care, 2022–2024

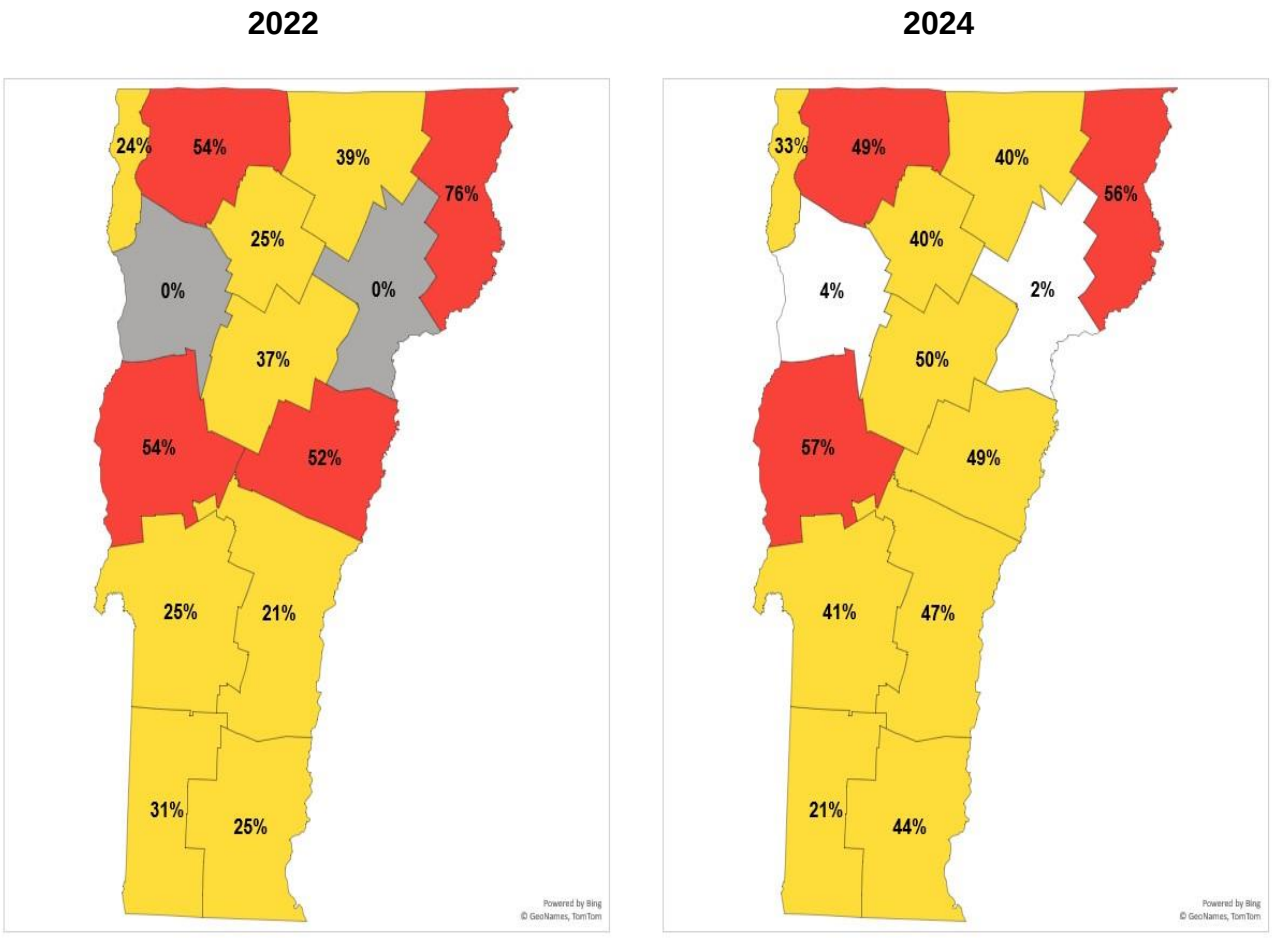


Toddlers

The 2024 analysis found that **32% of toddlers LTNC do not have access to regulated programs**, as compared to 25% in the 2022 report. This is a significant increase, meaning fewer toddlers have access to regulated programs.

At the county level, the percent of toddlers LTNC without access to a regulated program ranged from 2% to 57%, as shown in Figure 9. In alignment with the statewide finding that fewer children have access to care, seven counties experienced statistically significant increases in the percent of toddlers LTNC without access to regulated early care and education programs since the 2022 report. Fewer toddlers in Caledonia, Chittenden, Lamoille, Rutland, Washington, Windham, and Windsor counties have access to care. Bennington was the only county to experience a statistically significant decrease in the percent of toddlers LTNC without access to regulated programs, meaning more toddlers have access to care.

Figure 9. Toddlers LTNC Without Access to Regulated Care, 2022–2024

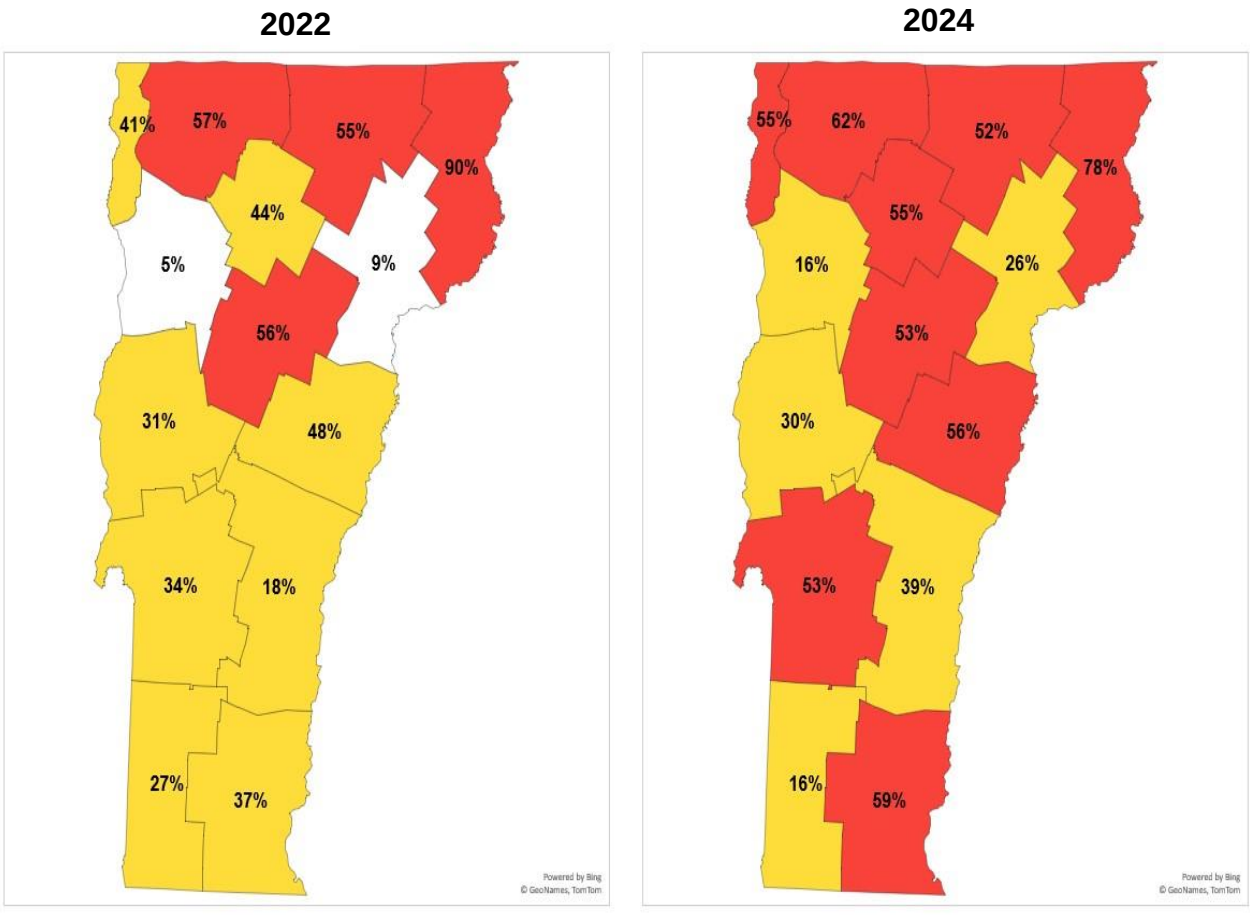


Preschoolers

As noted earlier in this report, the preschool analysis was introduced in the 2020 report and focuses specifically on preschool-age children (3- and 4-year-olds) LTNC who do not have access to full-day, full-year child care. The analysis found that statewide, **39% of preschoolers LTNC do not have access to regulated programs**, as compared to 31% in 2022. This is a statistically significant increase, meaning that fewer preschoolers have access to regulated programs.

As shown in Figure 10, percentages of preschoolers LTNC without access to a regulated program ranged from 16% to 78%. Ten counties experienced a statistically significant change since the 2022 report. In Caledonia, Chittenden, Franklin, Lamoille, Orange, Rutland, Windham, and Windsor counties the percent of preschoolers LTNC without access to regulated programs increased. In these counties, fewer children have access to regulated programs. Bennington was the only county in which the percent of preschoolers LTNC without access to regulated programs decreased. More preschoolers in Bennington County have access to regulated programs.

Figure 10. Preschoolers LTNC Without Access to Regulated Care, 2022–2024



Estimating the Need for Early Childhood Educators

Using this analysis of the number of slots needed in order to meet the demand for child care at the state and county level, Let's Grow Kids estimated the need for early childhood educators based on the current distribution of child care program types by county. Because each program type—registered FCCHs, licensed FCCHs, and CBCCPPs—has different staff-to-child ratio requirements, the mix of programs impacts the number of staff needed. It is important to note that this analysis is not proposing an ideal distribution or suggesting a likely usage pattern in a system with sufficient supply.

Once the distribution of slots was determined by program type for each county, the mandatory minimum ratio of staff to children was determined in order to identify the number of early childhood educators needed in order to operationalize the additional slots. The analysis assumes that the additional early childhood educators needed in Vermont's early care and education system are those that regularly, independently lead infant, toddler, and/or preschool child care rooms without restriction. As noted in the Background on Vermont's Early Care & Education System section of this report, these include CBCCPP teachers and associate teachers, licensed FCCHs in addition to support from a family child care assistant to provide increased capacity, and registered FCCHs.

Findings of the Let's Grow Kid's analysis were then compared to the findings of CDD's report on Vermont's current early childhood education workforce.[43] Unlike the *Stalled at the Start* analysis, CDD's workforce report used Vermont Agency of Human Services (AHS) Districts as their base level of analysis instead of Vermont counties. Given this, Let's Grow Kids first analyzed early childhood educator needs at the county level and then redistributed county-level findings into their approximate AHS district designations. This allowed Let's Grow Kids to compare current early childhood educator workforce numbers against the estimated need for additional early childhood educators at the regional level.

Statewide Findings

According to CDD's report on Vermont's early childhood workforce, there are 5,491 individuals working in CBCCPPs and 748 individuals working in FCCHs in our state.[44] However, only 2,131 of these individuals can independently supervise a group of infants, toddlers, or preschoolers for the majority of the day—center-based teachers, center-based teacher associates, licensed FCCH early childhood educators, and registered FCCH early childhood educators—with the addition of FCCH assistants who can support licensed FCCH early childhood educators in providing increased capacity.

Table 2 shows the number of current early childhood educators permitted to independently supervise children for the majority of the day, with the addition of FCCH assistants, compared to the additional number of early childhood educators in the noted positions who are needed in order to meet the demand for regulated child care in Vermont.

Let's Grow Kids' analysis found that approximately 2,314 additional early childhood educators are needed in the noted positions across all child care settings in order to meet demand for regulated child care in Vermont.

The number of early childhood educator positions needed varies across program types, with the largest number of early childhood educators needed in CBCCPPs, but the highest percent increase in registered FCCHs.

Table 2. Current Lead Early Childhood Educator Positions, with the addition of FCCH Assistants, Compared to the Number of Lead Early Childhood Educators Needed in Those Positions in Vermont to Meet Demand, 2024

Workforce Category	CBCCPP Teachers + Teacher Associates	Licensed FCCHs	Registered FCCHs	FCCH Assistants	Total
Current Early Childhood Education Workforce	1,631	23	398	79	**2,131**
Additional Lead Early Childhood Educators Needed	1,451	106	704	53	**2,314**
Percent Increase Needed	89%	461%	177%	67%	**109%**

Regional Findings

As noted earlier in this report, lead early childhood educator needs were first analyzed at the county level and then converted to AHS districts in order to compare current workforce information to the findings of this analysis. Just as early childhood educator workforce needs varied greatly by program setting at the statewide level, workforce needs also vary greatly at the AHS district level.

As shown in Table 3, the region with the greatest estimated need for more lead early childhood educators as compared to the current workforce is the Springfield AHS district area (Windsor County), and the area with the smallest need is the Burlington AHS district area (Chittenden County).

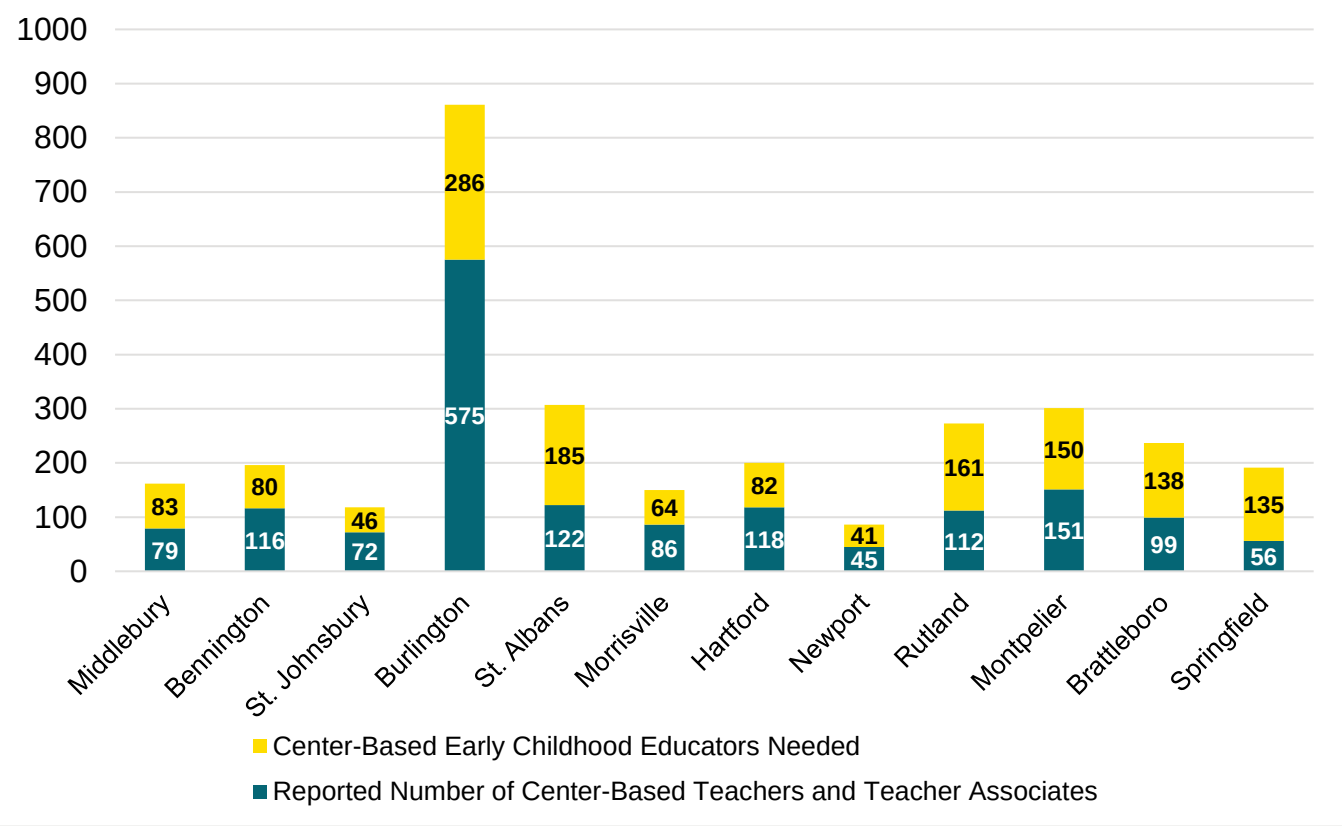
Table 3. Percent Increase Over Current Lead Early Childhood Educator Positions, with the addition of FCCH Assistants, to Meet Demand, 2024

AHS District	Percent Increase in Early Childhood Education Workforce Positions of Interest Needed to Meet Demand
Middlebury	127.43%
Bennington	71.71%
St. Johnsbury	90.83%
Burlington	51.08%
St. Albans	178.92%
Morrisville	85.71%
Hartford	112.95%
Newport	170.65%
Rutland	177.63%
Montpelier	112.22%
Brattleboro	147.58%
Springfield	225.00%

These overall percent increases can also be viewed as raw numbers by type of program setting and AHS district, as shown in Figures 11, 12, 13, and 14.

Figure 11 shows the distribution of center-based teacher and teacher associate positions needed across AHS districts. While, numerically, the Burlington AHS district needs the largest number of early childhood educators, when viewing the findings according to percent increase over the existing workforce, Springfield needs a 241% increase in its center-based early childhood educators (the most statewide), followed by St. Albans (152%), and Rutland (144%).

Figure 11. Reported Number of Center-Based Early Childhood Educators and Number of Additional Center-Based Early Childhood Educators Needed to Meet Demand by AHS District



Figures 12 and 13 show the increases needed in licensed FCCH early childhood educators. As noted previously in this report, any increase in licensed FCCH early childhood educators must be accompanied by an increase in FCCH assistants, as assistants allow licensed FCCHs to provide increased capacity over registered FCCHs (in addition to meeting increased regulations and other requirements).

While Montpelier needs the highest increase in the number of licensed FCCH early childhood educators, proportionally, Newport and Hartford are tied for needing the largest percent increase in their licensed family child care home early childhood educator workforce (900% increase each), followed by Windham (800% increase) and Rutland (733% increase). When focusing just on FCCH assistants, Rutland has the largest numerical increase, while Hartford has the largest proportional (225%).

Figure 12. Reported Number of Licensed FCCH Early Childhood Educators vs Number of Additional Licensed FCCH Early Childhood Educators Needed to Meet Demand by AHS District

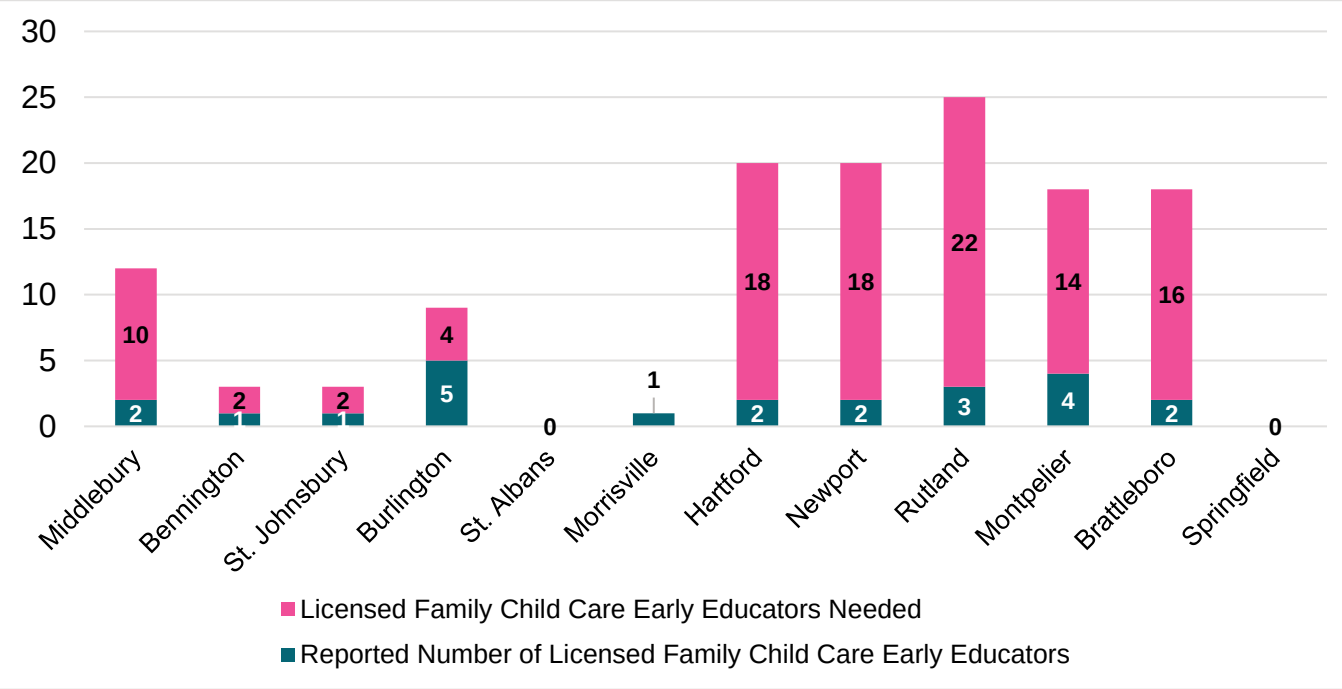
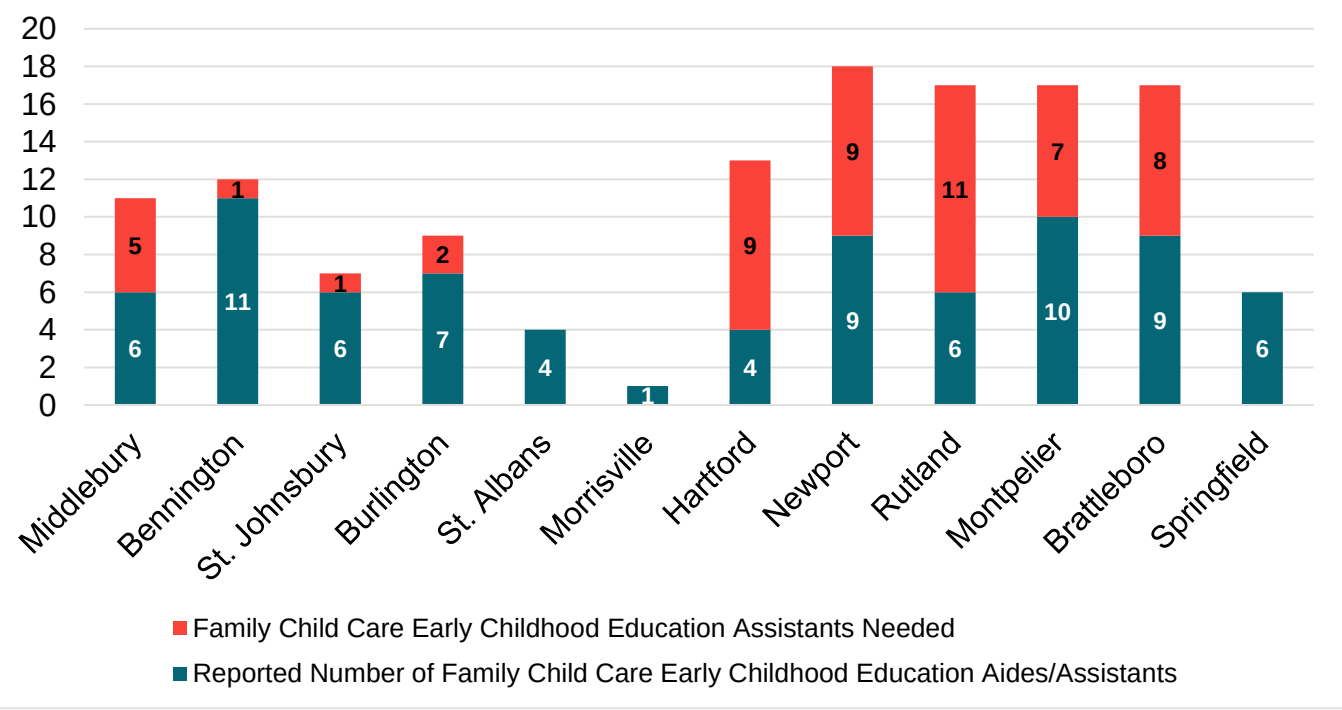
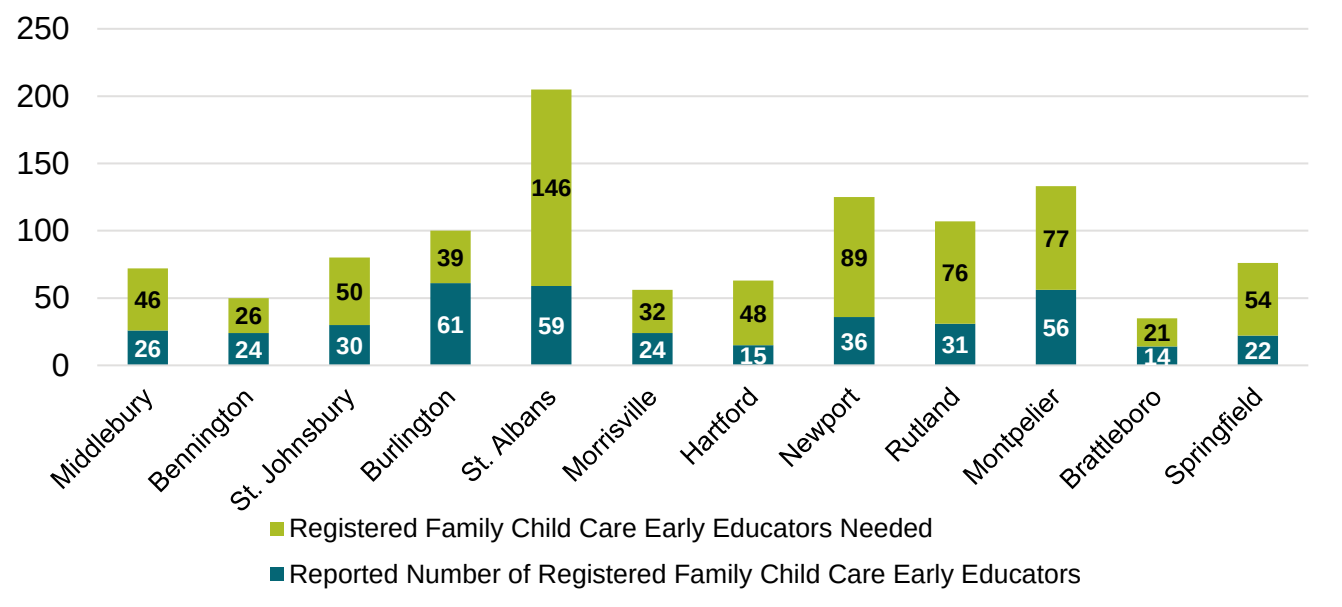


Figure 13. Reported Number of FCCH Early Childhood Education Assistants vs Number of Additional Licensed FCCH Early Childhood Education Assistants Needed to Meet Demand by AHS District



Finally, for registered FCCH early childhood educators, St. Albans shows the largest, numerical increase, but, proportionally, Hartford has highest percent increased need over its existing workforce (320% increase), followed by Newport and St. Albans (247% increase).

Figure 14. Reported Number of Registered FCCH Early Childhood Educators vs Number of Additional Registered FCCH Early Childhood Educators Needed to Meet Demand by AHS District



Methodology

Overview

Data from regulated early care and education programs was analyzed in conjunction with population estimate data to determine how closely current child care capacity matches the estimated needs for regulated child care for infants, toddlers, and preschoolers in Vermont. This information was then used to determine the number of slots that would need to be created to meet the estimated demand for child care. This information was then compared to teacher-to-child ratios for each age group to develop an estimate of the number of early childhood educators that would be needed to meet demand.

Determining the Supply of Regulated Child Care

Data on all active, regulated early care and education programs was obtained from the Vermont Department for Children and Families Child Development Division (CDD). All data is point-in-time as follows:

- For the 2024 analysis, the data is from September 30, 2023;
- For the 2022 analysis, the data is from September 30, 2021;
- For the 2020 report, the data is from September 30, 2019;
- For the 2018 report, the data is from September 30, 2017; and
- For the 2016 report, the data is from December 31, 2015.

The original data file included all regulated early care and education programs and afterschool programs in the state. For the purposes of this analysis, the file was then limited to only those programs serving infants, toddlers, and/or preschool-age children. These programs were identified using information in the data set related to capacity. The data set included information on two measures of capacity: licensed capacity (the maximum number of slots regulated programs are allowed to offer) and reported desired capacity (the number of slots a program self-reports offering for each age group). In the initial edition of *Stalled at the Start*, the advisory group for the project established that reported desired capacity was the most accurate measure of capacity for the purposes of the project. Advisors concurred with retaining this method of program identification for the 2024 edition of the report. The data set was sorted by reported desired capacity, and programs that do not offer at least one slot for at least one of the age groups of interest (infants, toddlers, or preschoolers) were removed from the data set.

Once the data set was limited to those serving at least one infant, toddler, and/or preschool-age child, programs that do not offer full-day, full-year child care were removed from the data set. The data set included fields providing information on a program's operating schedule (school-year-only, in-service days, or other arrangements) and typical hours of operation. For programs that did not have this information updated in CDD's database, staff reached out to verify their operating schedule and typical hours of operation.

Once the programs not offering full-year, full-day child care were removed from the data set, the remaining provider entries were used to calculate supply at the county and state levels.

Determining the Demand for Regulated Child Care

To determine the potential demand for child care, the advisory group for the first edition of *Stalled at the Start* developed a proxy measure: children likely to need care (LTNC). The LTNC population was determined using information from the U.S. Census Bureau on the percent of children ages five and under in Vermont with all available parents in the labor force, Vermont population estimates from the Vermont Department of Health, and age group definitions from CDD.

The Vermont Department of Health population estimate data set is organized by county and year of age. For the first three reports, the most current population estimate data sets were used to conduct the analysis. For the 2020 report, the analysis used the 2018 population estimate data set; for the 2018 report, the analysis used the 2016 population estimate data set; and for the 2016 report, the analysis used the 2014 population estimate data set. For the 2022 report, due to delays at the U.S. Census Bureau in releasing population information from the 2020 Census to state partners, the most current population data set available from the Vermont Department of Health was from 2019. Given that supply information was obtained during the COVID-19 pandemic, the research team considered multiple options to adjust the 2019 population data set to try to reflect the impact of the pandemic on population, including several different forecast models. However, because forecasting projections for county-specific population data had significant margins of errors, the team ultimately decided to use the 2019 population data set as presented.

Since the last time we conducted this report in 2022, the Vermont Department of Health and the U.S. Census Bureau have entered into a new data sharing agreement that stipulates that population by county and year of age can no longer be made available to the public. In order to obtain the data needed to run this report, Let's Grow Kids has entered into a data sharing agreement with the Vermont Department of Health. The agreement stipulates that single year of age population counts cannot be published in this report, and all population reference must be derivatives of population data. For the 2024 report, the analysis used the 2022 population estimate data set from the Vermont Department of Health.

Data on the percent of Vermont children ages five and under with all available parents in the labor force was obtained from the U.S. Census Bureau via data.census.gov. This data set included the statewide percentage as well as county-specific percentages.

The analysis to determine LTNC populations for infants, toddlers, and preschoolers was determined by summating year-of-age fields from the Vermont Department of Health's population estimates based on CDD's age group definitions (infants = children under two years of age, toddlers = two-year-olds, preschoolers = three- and four-year-olds). U.S. Census Bureau percentages were then applied to age group population totals at the state and county level.

For the first two editions of *Stalled at the Start*, the report's advisory committee interpreted this approach as providing a conservative estimate of actual demand, and for the 2020 edition of the

report, the advisory committee was able to validate the LTNC proxy by comparing it to findings from *Young Children's Early Care and Learning in Vermont*, a report on the findings of a study of the early care and education needs and practices of Vermont families with young children (children under five).[45]

Based on this research, the advisory group determined that while the LTNC methodology may slightly overestimate the child care usage of families with all available parents in the labor force, it also underestimates the usage of early care and education programs by families without all available parents in the labor force, and that the overall estimate is then very similar to the findings of the National Opinion Research Center (NORC) research. Additionally, the advisory group considered the specificity of available data in determining whether to continue using the LTNC methodology or to create a new demand estimate methodology using the findings of NORC's research. The NORC data, while very important and useful, is available at the state level only, whereas the LTNC methodology allows for county-specific analysis. Therefore, given that the LTNC methodology closely mirrors the findings of NORC's research and the methodology's applicability to analyzing supply and demand at the county level, the advisory group recommended that the report continue to use the LTNC proxy as an estimate for demand.

Determining Access to Child Care

The LTNC populations for the three age groups of interest were compared to the final supply data set to determine what percentage of each LTNC population did not have access to child care. If it was found that there was excess supply compared to demand, any resulting negative percentage was set to zero to indicate that all children LTNC have access when compared to supply.

Determining Significance of 2022–2024 Changes

Findings from the 2024 report were compared to the findings from the 2022 report for infants, toddlers, and preschoolers using a two-tailed *t*-test at $\alpha=0.05$ to determine whether changes were statistically significant. If the analysis found that the change was not statistically significant, the change is listed as "no significant change." If the change was found to be statistically significant, the change is listed as either "fewer children LTNC have access" or "more children LTNC have access," depending on whether there was an increase or decrease in the percentage of children LTNC without access to care.

Additional Assumptions, Caveats, and Definitions

In addition to the assumptions and caveats stated above, there are several additional caveats that should be accounted for when reviewing this report.

- Determining supply
    - Reported desired capacity
        - As noted earlier in the methodology discussion, the data that was used to determine supply was reported desired capacity. This field requires programs to enter information into CDD's database. However, not all FCCHs had data entered in this field.

        - If desired capacity was not reported, it was assumed the FCCH had the capacity to care for two infants, two toddlers, and two preschoolers.

- Determining demand
    - Age group populations
        - It was assumed that Vermont's current population is similar to the most recent population estimates available from the Vermont Department of Health and that this information is the best available resource for determining the number of children, by year of age.
    - Infant population
        - The Vermont Department of Health's population estimate information is broken out by year of age, with age zero representing all children birth through 11 months. However, CDD's definition of an infant eligible for child care is six weeks through 23 months. For children 12 months through 23 months, the population estimate for children age one was used. For children six weeks through 11 months, the population estimate for children age zero was used, as the advisory group noted that there was no reliable way to accurately project the number of children in the population estimate who were less than six weeks old.
    - LTNC population
        - For the purposes of this analysis, it was assumed that the U.S. Census Bureau's American Community Survey estimates of children ages five and under with all available parents in the labor force applied evenly across all age groups within Vermont's five and under population.
        - For the statewide analysis, the LTNC population was based on the statewide percent of children ages five and under with all available parents in the labor force, as reported in the most recent U.S. Census Bureau American Community Survey's five-year estimates.
            - For the 2024 report, the LTNC population is assumed to be 76.7% of the total age group population. This is based on the U.S. Census Bureau's American Community Survey 2018–2022 estimate that 76.7% of children ages five and under in Vermont have all available parents in the labor force.
            - For the 2022 report, the LTNC population is assumed to be 72.8% of the total age group population. This is based on the U.S. Census Bureau's American Community Survey 2015–2019 estimate that 72.8% of children ages five and under in Vermont have all available parents in the labor force.
            - For the 2020 report, the LTNC population was assumed to be 71.5% of the total age group population. This is based on the U.S. Census Bureau's American Community Survey 2014–2018 estimate that 71.51% of children ages five and under in Vermont have all available parents in the labor force.
            - For the 2018 report, the LTNC population was assumed to be 70.4% of the total age group population. This is based on the U.S. Census Bureau's American Community Survey 2012–2016 estimate that 70.38% of children ages five and under in Vermont had all available parents in the labor force.

        - For the 2016 report, the LTNC population was assumed to be 70.1% of the total age group population. This is based on the U.S. Census Bureau's American Community Survey 2010–2014 estimate that 70.14% of children ages five and under in Vermont had all available parents in the labor force.
    - For county-level analyses, the LTNC population was based on the county-specific percent of children ages five and under in a given county with all available parents in the labor force, as reported in the statewide analysis data sets noted above.

- Determining access to child care
    - Statewide analysis
        - For the statewide analysis, it was assumed that all infants, toddlers, and preschoolers LTNC had equal access to every program serving their given age group in the state.
        - The analysis does not account for considerations such as some regulated programs being limited to a particular population (e.g., Head Start), or some programs not having the resources necessary to serve children with advanced specialized needs (e.g., programs that do not have a specialized child care designation).
        - Additionally, the analysis does not account for other limiting factors such as cost, geographic access (e.g., families living in the northern part of a county not wanting to drive to the southern part of the county to access a child care slot), or transportation access (a family's ability to use personal or public transit to access a child care program).
    - County-level analysis
        - The analysis assumed that all children LTNC in a given county had equal access to programs in that same county and does not account for families seeking care outside of their county of residence.
        - Like the statewide analysis, the county-level analysis did not account for other limiting factors such as cost, geographic access, or transportation access.

- Program closures and openings
    - Through the operating schedule and typical hours of operation data collection process, the team learned that several programs had closed since the supply data set was provided. The advisory group determined that these programs should not be removed from the data set, as the data set represents point-in-time information.
    - The same approach was used in the operating schedule and typical hours of operation data collection process for the 2018, 2020, and 2022 reports.

Determining the Number of Early Childhood Educators Needed to Meet Demand

The first step in the process to determine the number of early childhood educators needed to staff the estimated number of slots needed to meet demand was to approximate the distribution of slots across program types, as different programs have different staff-to-child ratio requirements.

Using the data set provided by CDD related to the supply of regulated child care, Let's Grow Kids identified the proportional distribution of current slots by program type and by county.

Using the assumption that new slots would be added to the system based on current utilization patterns, Let's Grow Kids then proportionally distributed the slots needed to meet demand by program type and county based on the proportional distribution of current slots.

Let's Grow Kids then referred to the Vermont regulations for CBCCPPs and FCCHs in order to determine the number of early childhood educators needed to meet minimum staffing ratios for the number of slots needed.

Ratios used for calculations:

- CBCCPPs
  - Infants: 1 teacher or teacher associate caring for 4 infants
  - Toddlers: 1 teacher or teacher associate caring for 5 toddlers
  - Preschoolers: 1 teacher or teacher associate caring for 10 preschoolers
- Registered FCCHs
  - 1 registered family child care provider caring for 2 infants, 2 toddlers, and 2 preschoolers
- Licensed FCCHs
  - 1 licensed family child care provider and 1 family child care assistant caring for 4 infants, 4 toddlers, and 2 preschoolers

Let's Grow Kids determined that the new early childhood educators would need to be those who, in line with regulations, could supervise a group of infants, toddlers, and/or preschoolers. For CBCCPPs, this means that early childhood educators needed could be teachers or teacher associates; for registered FCCHs, this would be a family child care provider; and for licensed FCCHs, this would be a licensed family child care provider with the addition of a family child care assistant, as an assistant is required in order for the licensed family child care provider to offer more capacity than a registered family child care provider.

The analysis resulted in non-whole-numbers. The results were adjusted using Excel's "ROUNDUP" function to adjust the results to provide whole numbers, which equate to whole early childhood educators. While this adjustment then overstates the need, it was determined to be the best option to account for whole individuals.

In order to align findings with data on the existing early childhood education workforce, which is only available by AHS district, county-level findings were adjusted as best as possible to align with AHS district areas as shown in Table 4. As noted, Essex County findings were split evenly between the Newport and St. Johnsbury AHS districts.

Table 4. Vermont County to AHS District Conversion, 2024

AHS District	County
Middlebury	Addison
Bennington	Bennington
St. Johnsbury	Caledonia + Southern Essex
Burlington	Chittenden
St. Albans	Franklin + Grand Isle
Morrisville	Lamoille
Hartford	Orange
Newport	Orleans + Northern Essex
Rutland	Rutland
Montpelier	Washington
Brattleboro	Windham
Springfield	Windsor

Appendix

Table 5. Count of Regulated Programs Serving Infants, Toddlers, and/or Preschoolers by County, 2024

County	Count of All Regulated Programs Serving Infants, Toddlers and/or Preschoolers	Count of Regulated Programs Serving Infants	Count of Regulated Programs Serving Toddlers	Count of Regulated Programs Serving Preschoolers
Addison	**38**	30	12	34
Bennington	**36**	31	30	35
Caledonia	**42**	40	40	41
Chittenden	**128**	115	117	125
Essex	**5**	5	5	5
Franklin	**59**	54	57	56
Grand Isle	**5**	3	4	4
Lamoille	**19**	17	18	19
Orange	**24**	20	23	24
Orleans	**44**	40	41	43
Rutland	**47**	40	42	45
Washington	**53**	46	48	49
Windham	**26**	22	23	23
Windsor	**44**	36	40	42

Table 6. Infant Population Information by County, 2024

County	Percent of Children Ages Five and Under with All Available Parents in Labor Force	LTNC Infant Population
Addison	76.38%	440
Bennington	78.43%	498
Caledonia	72.78%	386
Chittenden	79.74%	2,331
Essex	57.70%	54
Franklin	77.21%	865
Grand Isle	70.51%	89
Lamoille	74.06%	361
Orange	75.49%	370
Orleans	79.77%	420
Rutland	77.42%	755
Washington	75.45%	761
Windham	77.39%	560
Windsor	71.40%	658

Table 7. Toddler Population Information by County, 2024

County	Percent of Children Ages Five and Under with All Available Parents in Labor Force	LTNC Toddler Population
Addison	76.38%	241
Bennington	78.43%	249
Caledonia	72.78%	197
Chittenden	79.74%	1,121
Essex	57.70%	27
Franklin	77.21%	429
Grand Isle	70.51%	43
Lamoille	74.06%	178
Orange	75.49%	192
Orleans	79.77%	209
Rutland	77.42%	395
Washington	75.45%	418
Windham	77.39%	304
Windsor	71.40%	363

Table 8. Preschool Population Information by County, 2024

County	Percent of Children Ages Five and Under with All Available Parents in Labor Force	LTNC Preschool Population
Addison	76.38%	479
Bennington	78.43%	539
Caledonia	72.78%	425
Chittenden	79.74%	2,503
Essex	57.70%	60
Franklin	77.21%	929
Grand Isle	70.51%	87
Lamoille	74.06%	385
Orange	75.49%	437
Orleans	79.77%	433
Rutland	77.42%	842
Washington	75.45%	839
Windham	77.39%	648
Windsor	71.40%	726

Table 9. Percent of Children LTNC Without Access to Regulated Child Care in Vermont, 2022–2024

LTNC Population	2022 Percent	2022 Report Status Flag	2024 Percent	2024 Report Status Flag	2022–2024 Change
Infants LTNC without access to regulated care	61%	Red Flag	65%	Red Flag	Fewer children have access
Toddlers LTNC without access to regulated care	25%	Yellow Flag	32%	Yellow Flag	Fewer children have access
Preschoolers LTNC without access to regulated care	31%	Yellow Flag	39%	Yellow Flag	Fewer children have access

Table 10. Additional Slots Needed to Meet Demand by County, 2024

County	Total Infant Slots Needed to meet LTNC demand	Total Toddler Slots Needed to meet LTNC demand	Total Preschooler Slots Needed to meet LTNC demand
Addison	295	138	145
Bennington	304	52	86
Caledonia	220	3	112
Chittenden	1,039	45	395
Essex	45	15	47
Franklin	672	212	579
Grand Isle	73	14	48
Lamoille	273	71	213
Orange	298	94	245
Orleans	296	84	225
Rutland	570	164	447
Washington	545	211	447
Windham	441	135	382
Windsor	479	169	284

Table 11. Percent of Infants LTNC Without Access to Regulated Care by County, 2022–2024

County	2022 Percent of Infants LTNC Without Access	2022 Report Status Flag	2024 Percent of Infants LTNC Without Access	2024 Report Status Flag	2022–2024 Change
Addison	69%	Red Flag	67%	Red Flag	No significant change
Bennington	62%	Red Flag	61%	Red Flag	No significant change
Caledonia	52%	Red Flag	57%	Red Flag	No significant change
Chittenden	43%	Yellow Flag	45%	Yellow Flag	No significant change
Essex	90%	Red Flag	83%	Red Flag	No significant change
Franklin	74%	Red Flag	78%	Red Flag	No significant change
Grand Isle	78%	Red Flag	82%	Red Flag	No significant change
Lamoille	66%	Red Flag	76%	Red Flag	Fewer children have access
Orange	76%	Red Flag	81%	Red Flag	No significant change
Orleans	69%	Red Flag	71%	Red Flag	No significant change
Rutland	61%	Red Flag	75%	Red Flag	Fewer children have access
Washington	72%	Red Flag	72%	Red Flag	No significant change
Windham	72%	Red Flag	79%	Red Flag	Fewer children have access
Windsor	62%	Red Flag	73%	Red Flag	Fewer children have access

Table 12. Percent of Toddlers LTNC Without Access to Regulated Care by County, 2022–2024

County	2022 Percent of Toddlers LTNC Without Access	2022 Report Status Flag	2024 Percent of Toddlers LTNC Without Access	2024 Report Status Flag	2022–2024 Change
Addison	54%	Red Flag	57%	Red Flag	No significant change
Bennington	31%	Yellow Flag	21%	Yellow Flag	More children have access
Caledonia	0%	Checkered Flag	2%	White Flag	Fewer children have access
Chittenden	0%	White Flag	4%	White Flag	Fewer children have access
Essex	76%	Red Flag	56%	Red Flag	No significant change
Franklin	54%	Red Flag	49%	Red Flag	No significant change
Grand Isle	24%	Yellow Flag	33%	Yellow Flag	No significant change
Lamoille	25%	Yellow Flag	40%	Yellow Flag	Fewer children have access
Orange	52%	Red Flag	49%	Yellow Flag	No significant change
Orleans	39%	Yellow Flag	40%	Yellow Flag	No significant change
Rutland	25%	Yellow Flag	41%	Yellow Flag	Fewer children have access
Washington	37%	Yellow Flag	50%	Yellow Flag	Fewer children have access
Windham	25%	Yellow Flag	44%	Yellow Flag	Fewer children have access
Windsor	21%	Yellow Flag	47%	Yellow Flag	Fewer children have access

Table 13. Percent of Preschoolers LTNC Without Access to Regulated Care by County, 2022–2024

County	2022 Percent of Preschoolers LTNC Without Access	2022 Report Status Flag	2024 Percent of Preschoolers LTNC Without Access	2024 Report Status Flag	2022–2024 Change
Addison	31%	Yellow Flag	30%	Yellow Flag	No significant change
Bennington	27%	Yellow Flag	16%	Yellow Flag	More children have access
Caledonia	9%	White Flag	26%	Yellow Flag	Fewer children have access
Chittenden	5%	White Flag	16%	Yellow Flag	Fewer children have access
Essex	90%	Red Flag	78%	Red Flag	No significant change
Franklin	57%	Red Flag	62%	Red Flag	Fewer children have access
Grand Isle	41%	Yellow Flag	55%	Red Flag	No significant change
Lamoille	44%	Yellow Flag	55%	Red Flag	Fewer children have access
Orange	48%	Yellow Flag	56%	Red Flag	Fewer children have access
Orleans	55%	Red Flag	52%	Red Flag	No significant change
Rutland	34%	Yellow Flag	53%	Red Flag	Fewer children have access
Washington	56%	Red Flag	53%	Red Flag	No significant change
Windham	37%	Yellow Flag	59%	Red Flag	Fewer children have access
Windsor	18%	Yellow Flag	39%	Yellow Flag	Fewer children have access

Table 14. Hours of Operation of Regulated, Full-Day, Full-Year Programs Serving Infants, Toddlers, and/or Preschoolers by County, 2024

County	Time First Infant, Toddler, or Preschool Slot Becomes Available	Most Common Time Infant, Toddler, or Preschool Slots Become Available	Most Common Time Infant, Toddler, or Preschool Slots Become Unavailable	Time Last Infant, Toddler, or Preschool Slot Becomes Unavailable
Addison	6:00 AM	7:30 AM	5:30 PM	5:30 PM
Bennington	6:30 AM	7:30 AM	5:30 PM	6:00 PM
Caledonia	5:00 AM	6:30 AM	5:30 PM	10:00 PM
Chittenden	6:00 AM	7:30 AM	5:30 PM	6:00 PM
Essex	6:30 AM	7:00 AM	5:00 PM	5:30 PM
Franklin	5:45 AM	6:30 AM	5:00 PM	6:00 PM
Grand Isle	7:00 AM	7:00 AM	5:30 PM	5:30 PM
Lamoille	6:00 AM	7:30 AM	5:00 PM	5:30 PM
Orange	6:00 AM	7:00 AM	5:00 PM	6:30 PM
Orleans	12:00 AM	6:00 AM	5:00 PM	11:45 PM
Rutland	5:00 AM	7:00 AM	5:30 PM	11:59 PM
Washington	6:15 AM	7:00 AM	5:00 PM	9:00 PM
Windham	6:30 AM	7:30 AM	4:30 PM	11:00 PM
Windsor	6:00 AM	7:00 AM	5:30 PM	6:00 PM

Table 15. Number of Programs with Early Morning Care (Before 8 AM), 2024

	Number of CBCCPPs with Early Hours	Number of Registered FCCHs with Early Hours	Number of Licensed FCCHs with Early Hours	Total Number of Programs with Early Hours
Vermont	182	303	18	503
Addison	7	22	2	31
Bennington	15	15	1	31
Caledonia	12	27	1	40
Chittenden	56	41	2	99
Essex	0	5	0	5
Franklin	12	47	0	59
Grand Isle	3	2	0	5
Lamoille	8	9	0	17
Orange	9	12	2	23
Orleans	6	34	3	43
Rutland	16	27	3	46
Washington	10	32	3	45
Windham	14	6	1	21
Windsor	14	24	0	38

Table 16. Number of Programs with Evening Care (After 5:30 PM), 2024

	Number of CBCCPPs with Late Hours	Number of Registered FCCHs with Late Hours	Number of Licensed FCCHs with Late Hours	Total Number of Programs
Vermont	13	15	2	30
Addison	0	0	0	0
Bennington	0	1	0	1
Caledonia	0	3	0	3
Chittenden	3	1	0	4
Essex	0	0	0	0
Franklin	1	1	0	2
Grand Isle	0	0	0	0
Lamoille	0	0	0	0
Orange	2	1	0	3
Orleans	1	2	1	4
Rutland	4	3	0	7
Washington	0	1	0	1
Windham	1	1	1	3
Windsor	1	1	0	2

Table 17. Number of Early Morning Care Slots by Age Group, 2024

	Number of Infant Slots with Early Hours	Number of Toddler Slots with Early Hours	Number of Preschool Slots with Early Hours
Vermont	2,543	2,531	4,675
Addison	115	63	214
Bennington	183	185	397
Caledonia	164	192	291
Chittenden	1,030	842	1,573
Essex	9	12	13
Franklin	193	217	350
Grand Isle	16	29	39
Lamoille	84	103	168
Orange	70	96	190
Orleans	122	123	206
Rutland	178	213	380
Washington	163	164	278
Windham	88	137	201
Windsor	128	155	375

Table 18. Number of Evening Care Slots by Age Group, 2024

	Number of Infant Slots with Evening Hours	Number of Toddler Slots with Evening Hours	Number of Preschool Slots with Evening Hours
Vermont	184	148	293
Addison	0	0	0
Bennington	2	2	2
Caledonia	6	8	8
Chittenden	50	32	62
Essex	0	0	0
Franklin	16	10	20
Grand Isle	0	0	0
Lamoille	0	0	0
Orange	13	16	15
Orleans	24	16	16
Rutland	46	41	115
Washington	2	2	2
Windham	9	11	13
Windsor	16	10	40

Table 19. Current Number of Lead Early Childhood Educators and FCCH Assistants by Program Type and AHS District, 2024

AHS District	CBCCPP Lead ECEs	Licensed FCCH ECEs	Registered FCCH ECEs	FCCH Assistants
Middlebury	79	2	26	6
Bennington	116	1	24	11
St. Johnsbury	72	1	30	6
Burlington	575	5	61	7
St. Albans	122	0	59	4
Morrisville	86	1	24	1
Hartford	118	2	15	4
Newport	45	2	36	9
Rutland	112	3	31	6
Montpelier	151	4	56	10
Brattleboro	99	2	14	9
Springfield	56	0	22	6

Table 20. Estimated Number of Additional Lead Early Childhood Educators and FCCH Assistants Needed by AHS District to Meet Demand, 2024

AHS District	CBCCPP Lead ECE Estimate	Licensed FCCH ECE Estimate	Registered FCCH ECE Estimate	FCCH Assistants Estimate
Middlebury	83	10	46	5
Bennington	80	2	26	1
St. Johnsbury	46	2	50	1
Burlington	286	4	39	2
St. Albans	185	0	146	0
Morrisville	64	0	32	0
Hartford	82	18	48	9
Newport	41	18	89	9
Rutland	161	22	76	11
Montpelier	150	14	77	7
Brattleboro	138	16	21	54
Springfield	135	0	54	0

Table 21. Estimated Number of Additional Lead Early Childhood Educators and FCCH Assistants Needed by County to Meet Demand, 2024

County	CBCCPP Infant Lead ECE Estimate	CBCCPP Toddler Lead ECE Estimate	CBCCPP Preschool Lead ECE Estimate	Licensed FCCH ECE Estimate	Registered FCCH ECE Estimate	FCCH Assistants Estimate
Vermont	979	189	283	106	704	53
Addison	47	25	11	10	46	5
Bennington	63	9	8	2	26	1
Caledonia	36	1	9	2	38	1
Chittenden	239	9	38	4	39	2
Essex	0	0	0	0	24	0
Franklin	98	22	41	0	141	0
Grand Isle	16	3	5	0	5	0
Lamoille	41	9	14	0	32	0
Orange	49	13	20	18	48	9
Orleans	23	6	12	18	77	9
Rutland	101	23	37	22	76	11
Washington	92	24	34	14	77	7
Windham	86	21	31	16	21	8
Windsor	88	24	23	0	54	0

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