

STALLED at the START

Vermont's Child Care Challenge

An Analysis of the Supply of and Demand for Regulated Infant and Toddler Care in Vermont

June 2016

By Let's Grow Kids

With the advisement of Vermont Birth to Five, the Vermont Department for Children and Families Child Development Division, the Vermont Department of Health Maternal and Child Health Division and Building Bright Futures

Too many Vermont children don't have access to high-quality, affordable child care.



About Let's Grow Kids

Every child deserves a strong start and equal chance in life. Let's Grow Kids is a public awareness and engagement campaign about the important role that high-quality, affordable child care can play in supporting the healthy development of Vermont's children during their first five years—the most important years for laying a foundation for success in relationships, school and life. Because Vermont's shortage of high-quality, affordable child care is a serious challenge for our communities and our economy, our goal is to gain public support leading to increased, sustainable investment that gives all children the chance to reach their full potential. Let's Grow Kids is a project of the Permanent Fund for Vermont's Children with support from the A.D. Henderson Foundation and the Turrell Fund.

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Table of Contents

About Let's Grow Kids	1
Executive Summary.....	4
Vermont's Child Care Challenge	5
The Importance of Early Care and Learning Opportunities.....	5
Why Quality Matters.....	5
Access	7
Affordability	7
What We Learned: Statewide Information	10
The Demand	10
Figure 1 - Infant and Toddler Population in Vermont.....	10
The Supply.....	11
Figure 2 - Capacity of Early Care and Learning Providers in Vermont	11
Figure 3 - Capacity of High-Quality Early Care and Learning Providers in Vermont	11
Putting It All Together.....	12
Figure 4 - Supply of and Demand for Child Care in Vermont	12
Access to Regulated Early Care and Learning	13
Access to High-Quality Early Care and Learning	13
Toddlers.....	14
Figure 5 - Toddler County-Level Analysis.....	14
Infants	15
Figure 6 - Infant County-Level Analysis.....	15
County Profile Sheets	16
Addison	18
Bennington.....	20
Caledonia.....	22
Chittenden.....	24
Essex	26
Franklin	28
Grand Isle	30

Lamoille.....	32
Orange	34
Orleans	36
Rutland.....	38
Washington	40
Windham.....	42
Windsor.....	44
How We Conducted Our Analysis	46
Methodology	46
Key Assumptions, Caveats and Definitions.....	48
APPENDIX	50
Appendix: Table 1 – Percent of Children Under 6 With All Available Parents in the Labor Force by County.....	51
Appendix: Table 2 – Infant Population Information by County	52
Appendix: Table 3 – Toddler Population Information by County	53
Appendix: Table 4 – County-Level Analysis of Access to Regulated Care	54
Appendix: Table 5 - County-Level Analysis of Access to High-Quality Care.....	55
Endnotes.....	56

Executive Summary

Let's Grow Kids, with the advisement of Vermont Birth to Five, the Vermont Department for Children and Families Child Development Division, the Vermont Department of Health Maternal and Child Health Division and Building Bright Futures, developed an analysis of the supply of and demand for regulated (licensed or registered) infant and toddler care in Vermont. The study found that, statewide, Vermont lacks sufficient regulated child care to meet the needs of infants and toddlers likely to need care: **almost half of Vermont infants and toddlers likely to need care do not have access to regulated early care and learning programs and 79% of infants and toddlers likely to need care do not have access to high-quality programs**, defined as regulated programs with 4- or 5-star recognition levels under Vermont's voluntary quality recognition and improvement system. The study also looked at access to regulated and high-quality, regulated programs at the county level and found that in some places, **98% of infants likely to need care do not have access to high-quality programs**. This lack of access to early care and learning programs is a significant challenge not only for Vermont's families with young children, but also for Vermont's communities and economy.

Early care and learning programs are an important resource for parents, allowing them to work or attend school to further their education. When working parents can't find child care, the businesses that employ them are also impacted. Research shows that in a six-month period, 45% of parents are absent from work at least once due to child care issues, missing an average of 4.3 days, and 65% of parents' work schedules are affected by child care challenges an average of 7.5 times.ⁱ These challenges cost US employers more than \$3 billion annually.ⁱⁱ

The quality of early care and learning programs is also important. During the earliest years of a child's life, the brain forms 700–1,000 new neural connections every second, laying the groundwork for future development.ⁱⁱⁱ It is important for children to have access to programs that are licensed or registered by the state, in order to ensure that programs offer safe, nurturing environments for young children.

Let's Grow Kids hopes that this statewide and county-level analysis will help to inform work being done across the state to support and strengthen Vermont's early care and learning system.

STALLED at the START

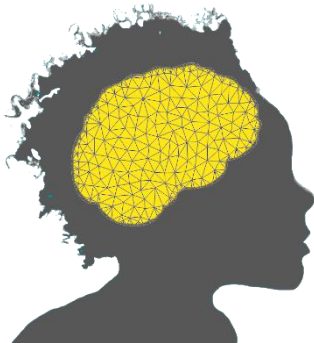
Vermont's Child Care Challenge

According to the US Census Bureau, more than 70% of Vermont children under the age of six live in families where all available parents are in the labor force.^{iv} **That's more than 2 out of 3 Vermont children under the age of six.** For these Vermont families, balancing work and life means figuring out how children will be cared for during work hours.

The National Survey of Early Care and Education has shown that in order to balance work and kids, families utilize a number of different arrangements to meet the care and learning needs of their children. Some families rely on relatives or friends to care for children while other families with two parents in the home may be able to split the parents' work schedules, where one parent works days and the other works nights.^v For many families though, early care and learning providers play a central role in the care and development of young children and allow working parents to retain their jobs.

The Importance of Early Care and Learning Opportunities

Science tells us that the first five years are the most important years in a child's life for healthy brain development. It's a time when the brain is creating its foundation for learning and development, **forming 700–1,000 new connections every second.**^{vi} Science has also found



that positive interactions with caregivers support and strengthen these connections, supporting the brain's foundation for healthy development. However, brain connections can be weakened or suppressed if a child does not have stimulating and supportive interactions with caregivers. Because these years provide the best opportunity to prepare our young children for future success, it is important that they have access to quality, developmentally-appropriate early care and learning programs.

Why Quality Matters

Research by Nobel Laureate economist James Heckman has found that investments in early childhood programs can yield a 7% to 10% annual return by reducing future costs in education, health care and corrections.^{vii} Recent studies have also shown that states that invest in high-quality early care and learning programs see a greater return on their investment

than states that do not focus on quality and instead make a more general investment in early care and learning systems.^{viii} Children in high-quality programs are less likely to need special education or be held back a grade, and are less likely to commit a violent crime. High-quality child care is good for children and parents, but it is also good for Vermont overall.

When the term high-quality is used to describe an early care and learning program, it often refers to a program that is staffed by nurturing caregivers who are educated in early learning and development. In addition to keeping children safe, the program has activities that have been shown to promote good thinking skills and healthy social and emotional development that prepares them for success in school, relationships and life.

Vermont has worked to support early care and learning providers in increasing the quality of programs through a variety of efforts, including through the state's quality recognition and improvement system known as STARS (STep Ahead Recognition System). Quality recognition and improvement systems are nationally considered a best practice for states. They provide a framework for building strong early care and learning programs for young children, and allow states to provide families and policy makers with information that can be helpful in better understanding some of the data behind a state's early care and learning programs.^{ix} Currently, Vermont is one of 39 states plus the District of Columbia that utilize a statewide quality recognition and improvement system for early childhood care and learning programs, and 3 other states currently utilize a county- or region-specific quality recognition and improvement system.^x

STARS is a voluntary program through which participating programs receive a quality recognition designation of 1 to 5 stars; high-quality is defined as 4 and 5 stars. Over 70% of regulated providers have chosen to participate in STARS. Programs that participate in STARS are "stepping ahead," going above and beyond basic state regulations to provide professional services that meet the needs of children and families.

We recognize there are many quality programs who are committed to working on a path of continuous improvement to achieve a high-quality 4- and 5-star recognition level who do not yet have this designation, and that there are quality programs who do not currently participate in the STARS system. The STARS process allows programs to achieve their quality designation through a wide variety of criteria in five different arenas—no single factor determines quality. The five STARS arenas, and the criteria within them, were developed based upon research and best practice, and are also informed by the experiences of other states that utilize quality recognition and improvement systems.

No quality recognition system is perfect and the system should be under regular review and engage in continuous quality improvement. STARS does this by maintaining an active

Oversight Committee. In addition, through a project supported by Vermont's Early Learning Challenge – Race to the Top grant, a national research center called Child Trends is conducting an independent, comprehensive evaluation of STARS to ensure that our system for rating high quality programs is effective.

Unfortunately, many Vermont families have shared with Let's Grow Kids and our partners that finding and affording early care and learning programs, especially high-quality programs, can be a serious challenge, particularly for infants or toddlers.

Access

In a 2015 project called Small Talk, Let's Grow Kids collected personal stories from more than 100 Vermonters on their experiences with early care and learning in the state. Almost every person who met with our Small Talk team shared that they had experienced challenges finding child care or knew a friend, family member or coworker who had experienced challenges finding care. The challenges most frequently discussed included difficulty finding available child care, lack of transportation and affordability.


Affordability

According to the 2014 report "How Are Vermont's Young Children and Families?," issued by Building Bright Futures, middle-income families with two children spend 28–40% of their annual income on child care.^{xi} In contrast, the federal Agency of Health and Human Services has previously recommended that families spend no more than 10% of their income on child care costs, and has proposed revising that affordability threshold to 7%.^{xii} 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.

However, affordability is also an issue for early care and learning providers. Providing quality child care is expensive for many reasons including the following cost drivers:


- Qualified personnel
- Regulated child-to-staff ratios
- Providing children with nutritious food
- Offering staff professional development opportunities

The other affordability challenge for child care providers is how much they earn. The average annual salary for a Vermont child care worker is only \$24,850, often without benefits.^{xiii} This is less than what Vermont considers to be a livable wage for a single person living in shared housing.



While the current analysis of child care supply and demand in Vermont does not include an analysis of affordability, the work group hopes to pursue additional work on this important topic in the future, and recognizes the important role that costs for both parents and providers play in Vermont's early care and learning system.

The importance of affordability was highlighted recently by the Vermont Legislature when it created the **Blue Ribbon Commission on Financing High Quality, Affordable Child Care** in 2015. The Blue Ribbon Commission is made up of community members, state agency representatives, child care providers, members of the business community and members of the military, and is charged with investigating how to best finance Vermont's efforts to provide quality early care and learning programs for all Vermont families who rely on them. The child care supply and demand analysis work group hopes to learn from the commission's work and apply the commission's findings to future updates of this report.



Estimating the Supply of and Demand for Child Care

In order to better understand the supply of child care for infants and toddlers in Vermont, Let's Grow Kids, in partnership with the Vermont Department for Children and Families Child Development Division, the Vermont Department of Health Maternal and Child Health Division, Building Bright Futures and Vermont Birth to Five, conducted a study of the supply of and demand for regulated infant and toddler child care in Vermont. Regulated child care means that the program is licensed or registered with the Child Development Division (CDD) of the Vermont Department for Children and Families. CDD maintains information on all regulated programs in the state, including information on whether a program participates in Vermont's quality recognition and improvement system, known as STARS (STep Ahead Recognition System). For this study, high-quality programs were defined as those with a STARS recognition level of 4- or 5-stars. Supply was determined based on the capacity of regulated providers that cared for infants or toddlers, or had the ability to care for infants and toddlers.

In order to estimate the demand for child care, the work group developed a proxy: children likely to need care (LTNC). For this study, the work group modeled the LTNC population based on population estimates by age and by county from the Vermont Department of Health and information from the US Census Bureau on the percent of Vermont children under 6 with all available parents in the labor force. This approach was determined to provide a conservative estimate of actual demand, as other child care supply and demand studies conducted in the United States used the full child population as proxy for demand. For this study, infants are defined as children age 6 weeks (1 ½ months) to 23 months (almost 2 years old), and toddlers are defined as children ages of 24 months (2 years) to 35 months (almost 3 years old). These definitions are based on the Vermont Department for Children and Families Child Development Division's definitions for regulated child care providers in Vermont.^{xiv}

More information on the methodology used for the project is included in the "How We Conducted Our Analysis" section of this report (page 44).

What We Learned: Statewide Information

Statewide, 79% of Vermont’s infants and toddlers likely to need care don’t have access to high-quality, regulated child care programs. This is a serious challenge for Vermont families, communities and the state’s economy.

The Demand

According to the latest population estimates from the Vermont Department of Health, there are 18,247 children under the age of 3 in Vermont (infants and toddlers). Based on the US Census Bureau’s estimate that approximately 70.4% of Vermont children under the age of 6 have all parents in the labor force, that means that approximately 12,846 children under the age of 3 in Vermont are likely to need some form of child care, of whom approximately 8,502 are infants and 4,344 are toddlers.^{xv}

Figure 1 - Infant and Toddler Population in Vermont

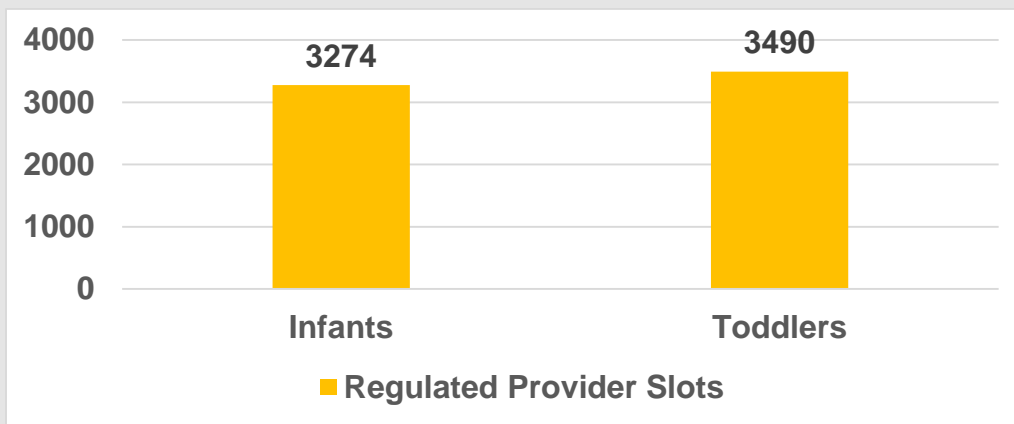
Age Group	Total Estimated Population	Number of Children Likely to Need Care
Infants & Toddlers	18,247	12,846
Infants	12,076	8,502
Toddlers	6,171	4,344

The Supply

Vermont's supply of regulated early care and learning programs that care for infants and toddlers is limited.

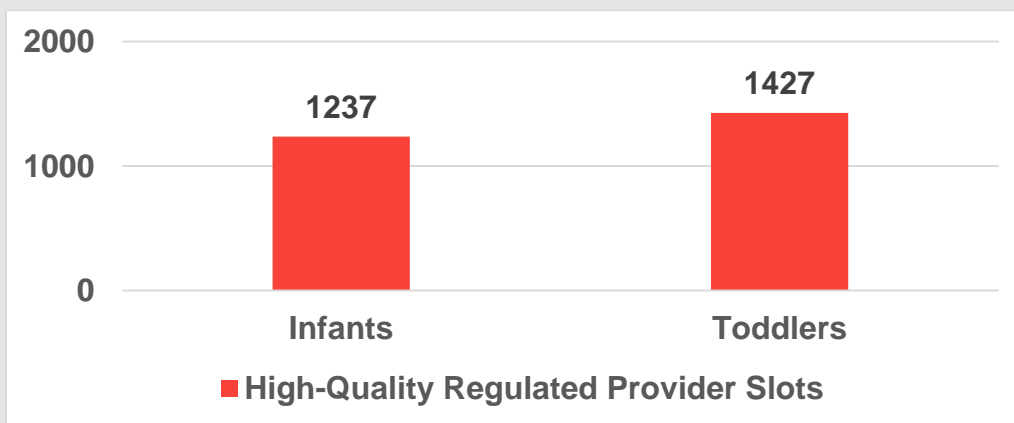
Review of the available data on the supply of slots for infants and toddlers showed that providers have 6,764 slots available for infants and toddlers, of which 3,274 were for infants and 3,490 were for toddlers, as shown in Figure 2.

Figure 2 - Capacity of Early Care and Learning Providers in Vermont



Of those 6,764 slots, only 2,664 slots for infants and toddlers were at high-quality programs. Of those 2,664 high-quality slots, less than half were for infants, totaling 1,237 slots, and 1,427 were allocated for toddlers, as shown in Figure 3.

Figure 3 - Capacity of High-Quality Early Care and Learning Providers in Vermont

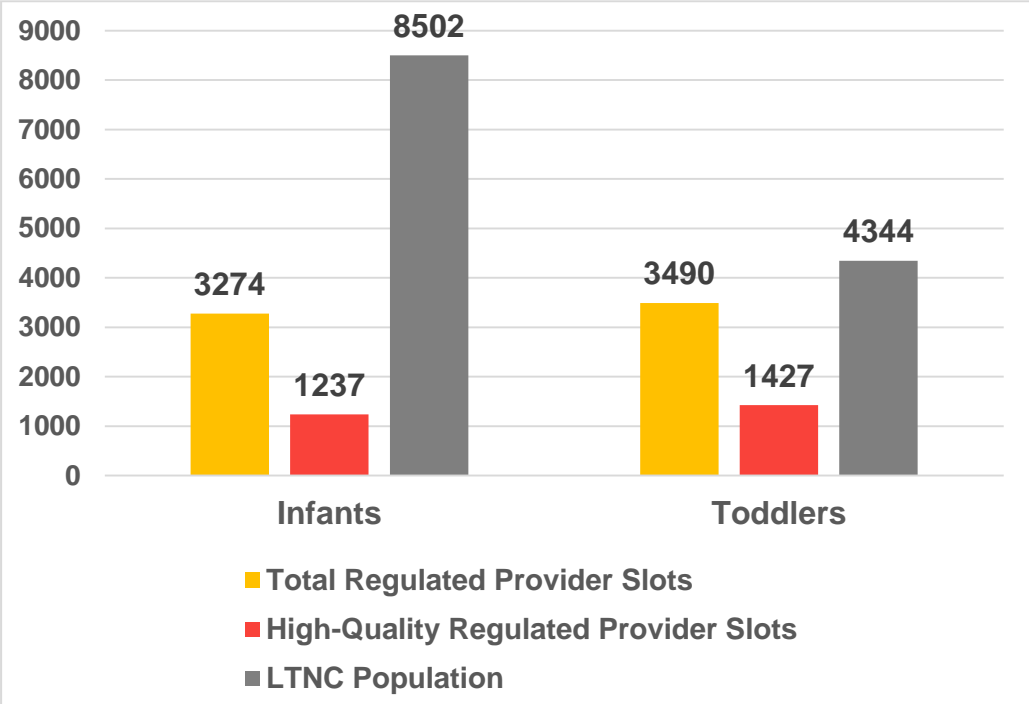


Putting It All Together

When supply and demand information is combined, the findings are alarming.

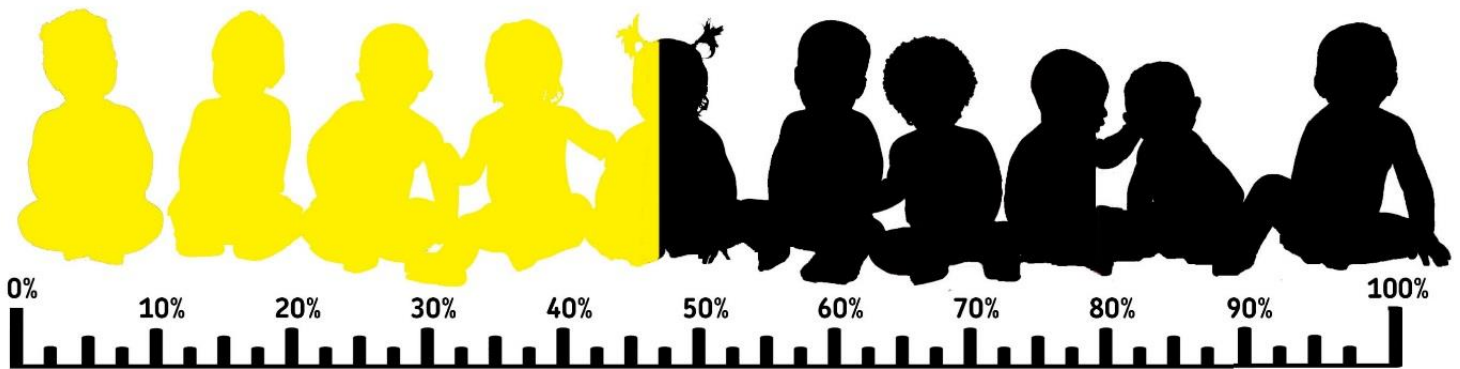
Statewide, Vermont does not have sufficient regulated early care and learning options to meet the needs of infants and toddlers likely to need care (LTNC), as shown in Figure 4. High-quality slots are a portion of the available regulated slots. The total number of regulated slots (including high-quality slots) is represented by the regulated provider slots bar.

Figure 4 - Supply of and Demand for Child Care in Vermont
Note: High-Quality Slots are a portion of the available regulated slots



Access to Regulated Early Care and Learning

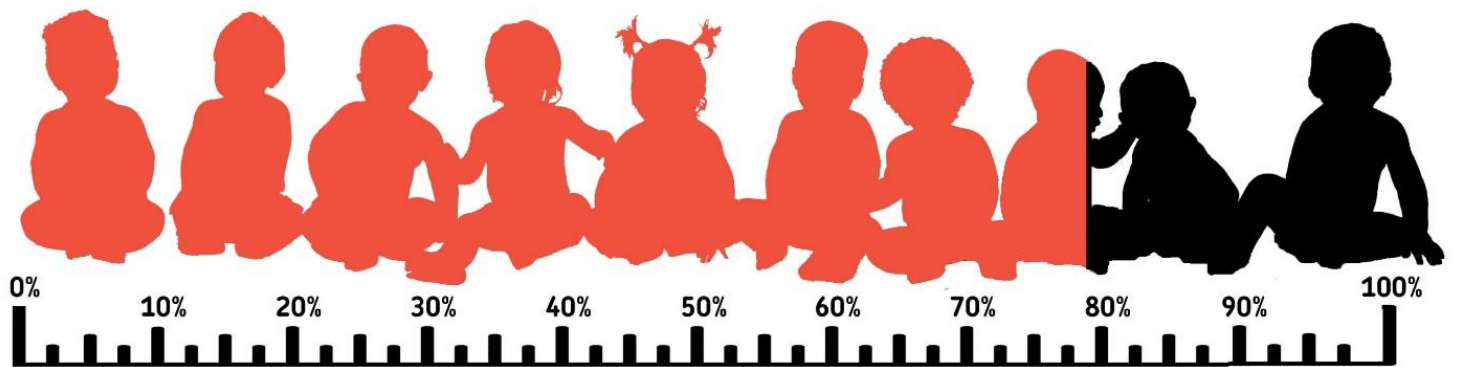
The analysis showed that **nearly half (47%)** of infants and toddlers likely to need care do **not have access to any regulated child care program.**



47% of Vermont Infants & Toddlers LTNC Don't Have Access to Regulated Child Care

Access to High-Quality Early Care and Learning

The analysis also showed that **79%** of infants and toddlers likely to need care do **not have access to high-quality programs.**



79% of Vermont Infants & Toddlers LTNC Don't Have Access to High-Quality Child Care

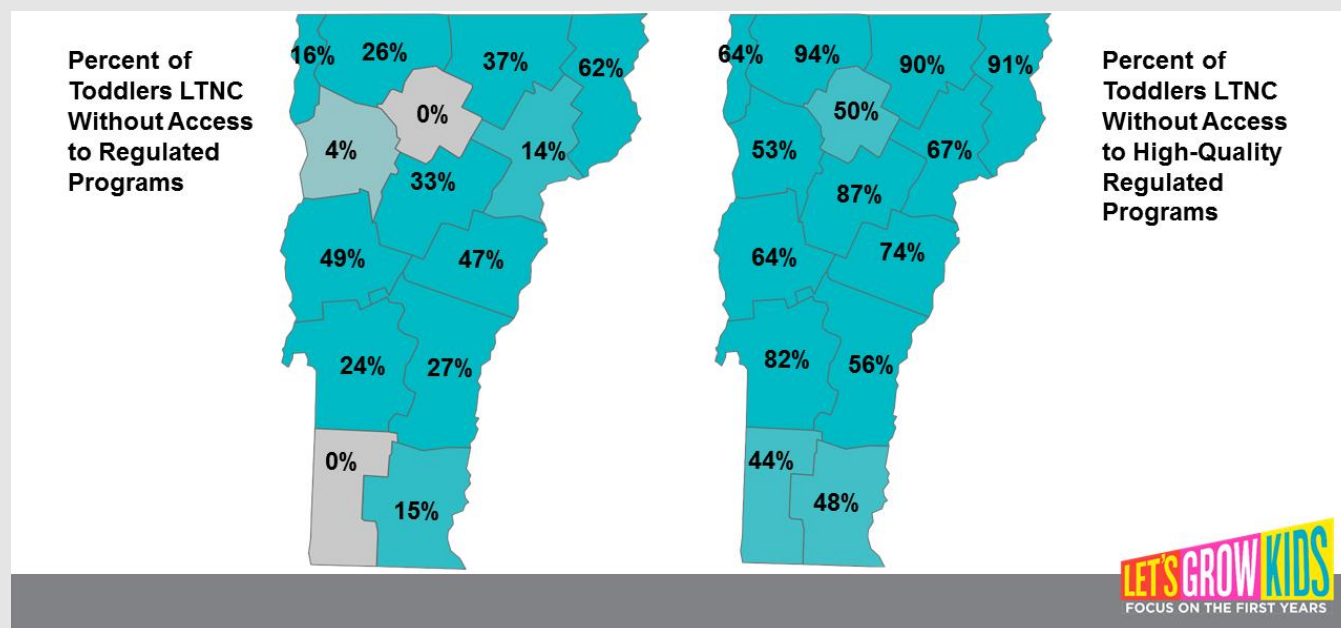
Toddlers

Statewide, more toddlers have access to regulated or high-quality early care and learning programs than infants. When toddler access to regulated care was evaluated, the analysis showed that 20% of toddlers likely to need care don't have access to regulated programs.

However, when this analysis was limited to access to high-quality programs, the lack of access increased significantly. The analysis found that **67% of toddlers likely to need care don't have access to high-quality programs**. As you can see in Figure 5, in some counties, more than 90% of toddlers likely to need care do not have access to high-quality, regulated programs.

Detailed information on toddler supply and demand can be found in Table 2 in the appendix.

Figure 5 - Toddler County-Level Analysis



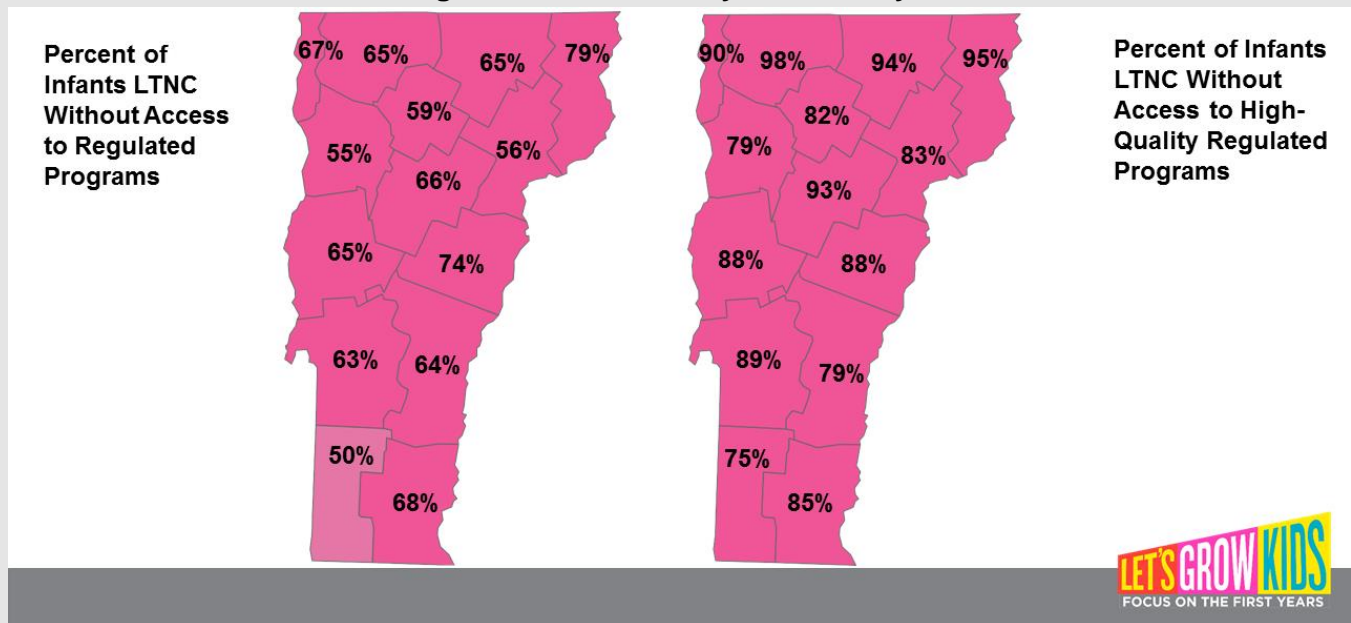
Infants

Statewide, 61% of infants likely to need care do not have access to regulated early care and learning programs.

When the analysis focused on access to high-quality programs it showed that **85% of infants likely to need care do not have access to high-quality, regulated programs**, with many counties facing numbers higher than 90% of infants likely to need care not having access to high-quality, as shown in Figure 6.

Detailed information on infant supply and demand can be found in Table 3 in the appendix.

Figure 6 - Infant County-Level Analysis



County Profile Sheets

Overall, Vermont families with infants and toddlers face challenges finding regulated child care due to lack of access, quality and affordability. These obstacles stall many children at the starting line. The supply of high-quality, regulated child care in comparison to the demand for care was evaluated for each Vermont county, as county-specific information highlights the unique circumstances of families with young children across the state. Each of the following county profile sheets includes “status flags.” These are visual indicators that quickly show whether a county faces a shortage of regulated child care to meet the needs of the county’s infant and toddler LTNC populations.



RED FLAG

“Stalled at the Start”: 51%–100% of children likely to need care do not have access.



YELLOW FLAG

“Hazard”: 16%–50% of children likely to need care do not have access.



WHITE FLAG

“Final Lap”: 1%–15% of children likely to need care do not have access.



CHECKERED FLAG

“Winner”: <1% of children likely to need care do not have access.

In addition to the following county profile sheets, information on the supply of and demand for child care for each Vermont county can be found in Tables 4 and 5 in the appendix.

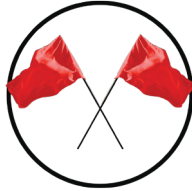


More than 70% of Vermont kids under age 6 are likely to need some form of child care because their parents are in the labor force.

How well is that need for child care being met for kids in Addison County?

81% of infants and toddlers likely to need care in Addison County do not have access to high-quality programs.

Infant Access Status: **Stalled at the Start**



88% of infants likely to need care don't have access to **high-quality*** programs.



65% of infants likely to need care don't have access to any **regulated**** programs.

Toddler Access Status: **Stalled at the Start**



64% of toddlers likely to need care don't have access to **high-quality** programs.



49% of toddlers likely to need care don't have access to any **regulated** programs.

See what the status and flags mean on the back. ▶

**See how high-quality is defined on the back.* ▶

***Regulated means licensed or registered with the state.*

TAKE ACTION

- ▶ Read the full report on access to high-quality child care for infants and toddlers statewide at letsgrowkids.org.
- ▶ Contact your Let's Grow Kids field coordinator to get involved in the campaign: Shayla Zammuto, shayla@letsgrowkids.org

Vermont has a child care challenge. Statewide, more than 79% of infants and toddlers likely to need child care don't have access to high-quality programs. Vermont families and child care providers need our support to strengthen resources for our early care and learning programs.

WHAT DO WE MEAN BY HIGH-QUALITY?

In Vermont, regulated child care programs can participate in the state's quality recognition and improvement system, called STARS (STep Ahead Recognition System). A program can receive a quality recognition level ranging from 1 star to 5 stars. Based on this system, when we talk about high-quality programs, we generally mean programs with a 4- or 5-star recognition level.

High-quality early care and learning programs are staffed by consistent, nurturing caregivers who are educated in early childhood learning and development. In addition to keeping children safe, high-quality programs offer a clean, cheerful environment with outdoor space, and include play-based activities that enrich and promote learning and development, preparing children for success in school, relationships and life.

HOW DO WE DEFINE INFANTS & TODDLERS?

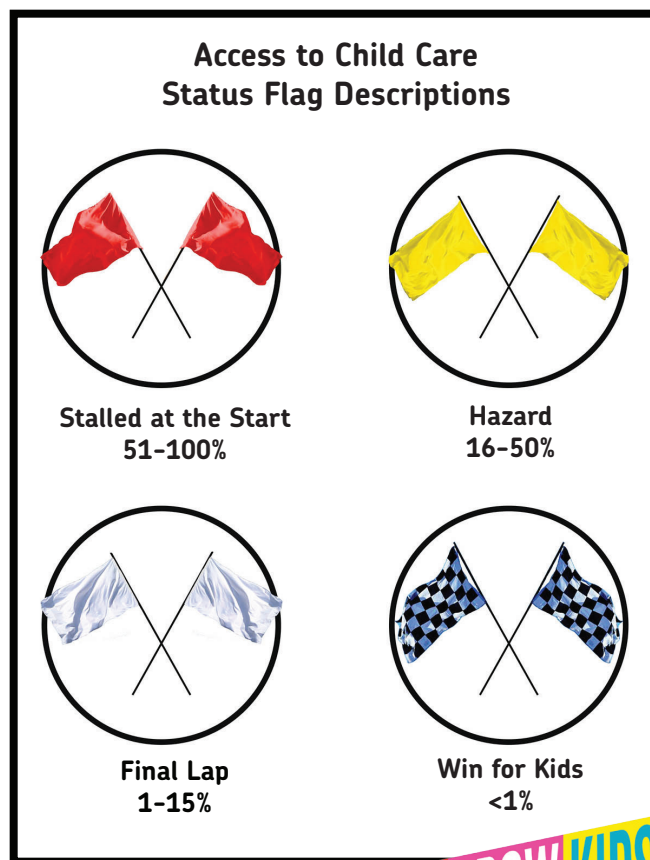
When it comes to child care licensing and registration requirements, "infants" are children ages 6 weeks old (1½ months) to 23 months old (almost 2 years), and "toddlers" are children ages 24 months old (2 years) to 35 months old (almost 3 years).

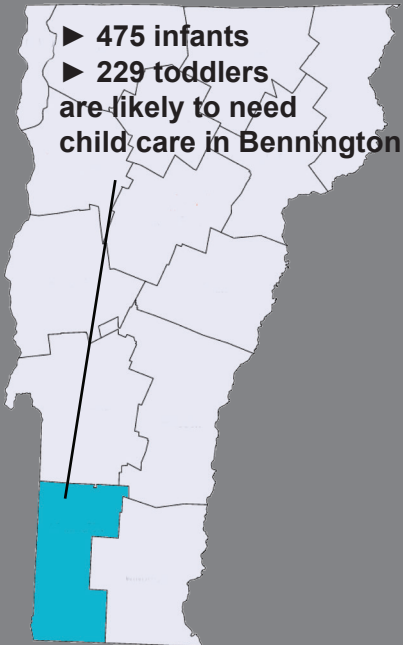
AFFORDABILITY

Quality child care is expensive for both Vermont families and child care providers.

We know that many Vermont families struggle to pay for child care. Middle-income families with two working parents and two young children spend between 28% and 40% of their income on child care. That's over \$19,000 a year—more than the cost of full-time, in-state tuition at a Vermont State college.

We also know that many child care workers in Vermont don't earn very much. On average, a Vermont child care worker makes \$24,850, often without benefits. That's less than the annual salary Vermont considers a "livable wage"—the amount a person needs to make to afford basic needs like housing, food and transportation.



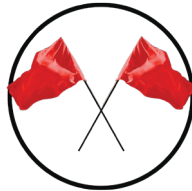


More than 70% of Vermont kids under age 6 are likely to need some form of child care because their parents are in the labor force.

How well is that need for child care being met for kids in Bennington County?

65% of infants and toddlers likely to need care in Bennington County do not have access to high-quality programs.

Infant Access Status: Stalled at the Start



75% of infants likely to need care don't have access to **high-quality*** programs.



50% of infants likely to need care don't have access to any **regulated**** programs.

Toddler Access Status: Stalled at the Start



44% of toddlers likely to need care don't have access to **high-quality** programs.



0% of toddlers likely to need care don't have access to any **regulated** programs.

See what the status and flags mean on the back. ▶

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TAKE ACTION

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High-quality early care and learning programs are staffed by consistent, nurturing caregivers who are educated in early childhood learning and development. In addition to keeping children safe, high-quality programs offer a clean, cheerful environment with outdoor space, and include play-based activities that enrich and promote learning and development, preparing children for success in school, relationships and life.

HOW DO WE DEFINE INFANTS & TODDLERS?

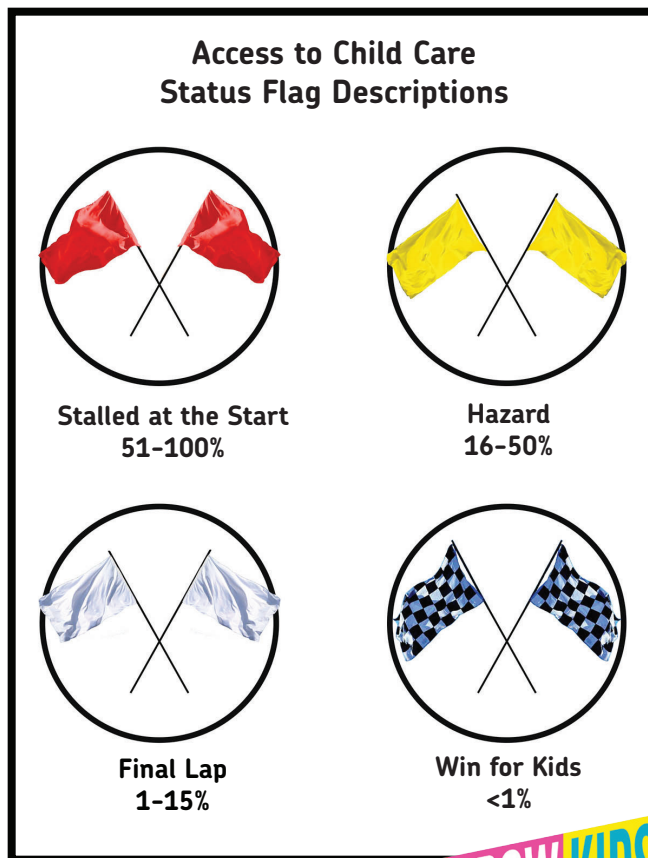
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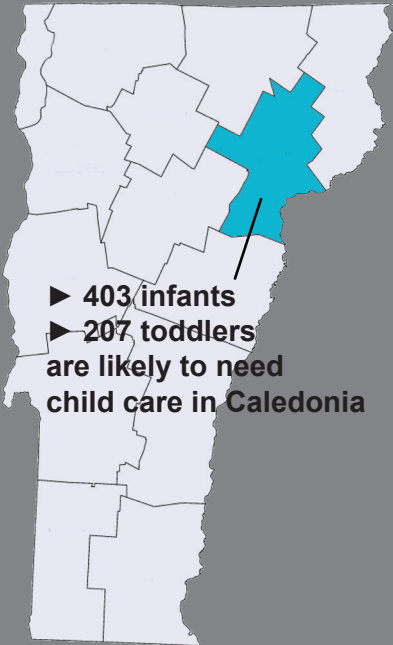
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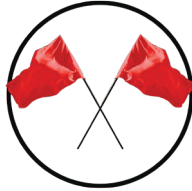


More than 70% of Vermont kids under age 6 are likely to need some form of child care because their parents are in the labor force.

How well is that need for child care being met for kids in Caledonia County?

78% of infants and toddlers likely to need care in Caledonia County do not have access to high-quality programs.

Infant Access Status: **Stalled at the Start**



83% of infants likely to need care don't have access to **high-quality*** programs.



56% of infants likely to need care don't have access to any **regulated**** programs.

Toddler Access Status: **Stalled at the Start**



67% of toddlers likely to need care don't have access to **high-quality** programs.



14% of toddlers likely to need care don't have access to any **regulated** programs.

See what the status and flags mean on the back. ►

*See how high-quality is defined on the back. ►

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TAKE ACTION

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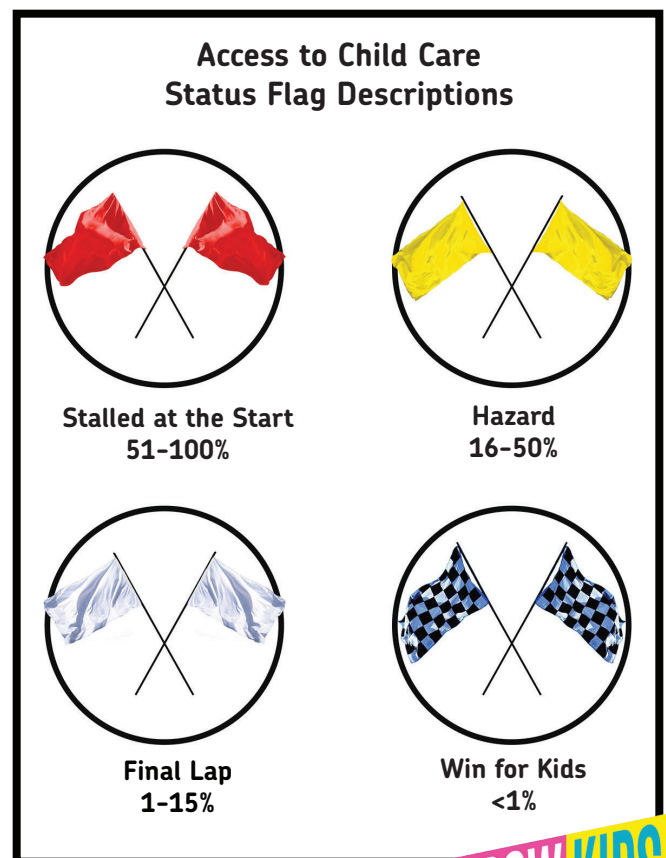
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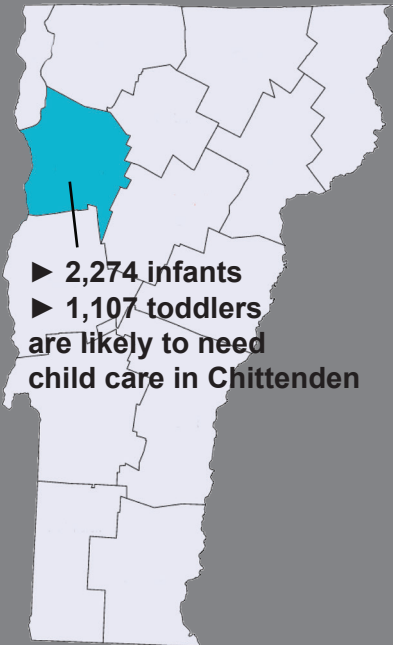
AFFORDABILITY

Quality child care is expensive for both Vermont families and child care providers.

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We also know that many child care workers in Vermont don't earn very much. On average, a Vermont child care worker makes \$24,850, often without benefits. That's less than the annual salary Vermont considers a "livable wage"—the amount a person needs to make to afford basic needs like housing, food and transportation.





▶ 2,274 infants
▶ 1,107 toddlers
are likely to need
child care in Chittenden

More than 70% of Vermont kids under age 6 are likely to need some form of child care because their parents are in the labor force.

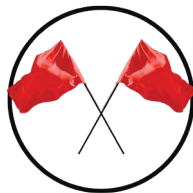
How well is that need for child care being met for kids in Chittenden County?

71% of infants and toddlers likely to need care in Chittenden County do not have access to high-quality programs.

Infant Access Status: **Stalled at the Start**

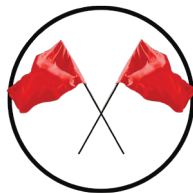


79% of infants likely to need care don't have access to **high-quality*** programs.



55% of infants likely to need care don't have access to any **regulated**** programs.

Toddler Access Status: **Stalled at the Start**



53% of toddlers likely to need care don't have access to **high-quality** programs.



4% of toddlers likely to need care don't have access to any **regulated** programs.

See what the status and flags mean on the back. ▶

**See how high-quality is defined on the back. ▶*

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TAKE ACTION

- ▶ Read the full report on access to high-quality child care for infants and toddlers statewide at letsgrowkids.org.
- ▶ Contact your Let's Grow Kids field coordinator to get involved in the campaign: Shayla Zammuto, shayla@letsgrowkids.org

Vermont has a child care challenge. Statewide, more than 79% of infants and toddlers likely to need child care don't have access to high-quality programs. Vermont families and child care providers need our support to strengthen resources for our early care and learning programs.

WHAT DO WE MEAN BY HIGH-QUALITY?

In Vermont, regulated child care programs can participate in the state's quality recognition and improvement system, called STARS (STep Ahead Recognition System). A program can receive a quality recognition level ranging from 1 star to 5 stars. Based on this system, when we talk about high-quality programs, we generally mean programs with a 4- or 5-star recognition level.

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HOW DO WE DEFINE INFANTS & TODDLERS?

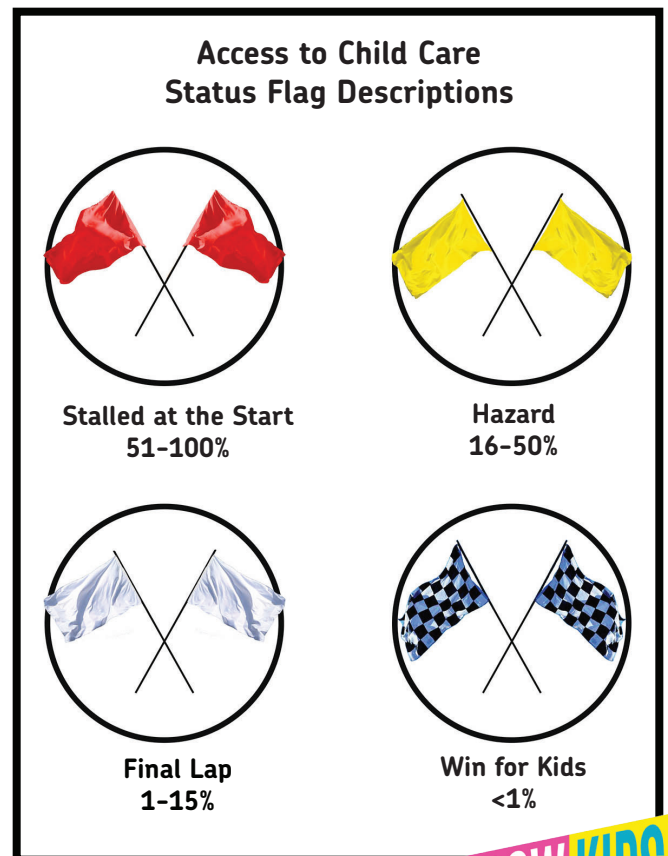
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More than 70% of Vermont kids under age 6 are likely to need some form of child care because their parents are in the labor force.

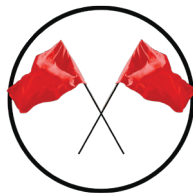
How well is that need for child care being met for kids in Essex County?

93% of infants and toddlers likely to need care in Essex County do not have access to high-quality programs.

Infant Access Status: **Stalled at the Start**

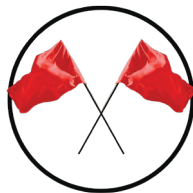


95% of infants likely to need care don't have access to **high-quality*** programs.

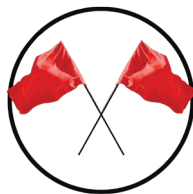


79% of infants likely to need care don't have access to any **regulated**** programs.

Toddler Access Status: **Stalled at the Start**



91% of toddlers likely to need care don't have access to **high-quality** programs.



62% of toddlers likely to need care don't have access to any **regulated** programs.

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TAKE ACTION

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HOW DO WE DEFINE INFANTS & TODDLERS?

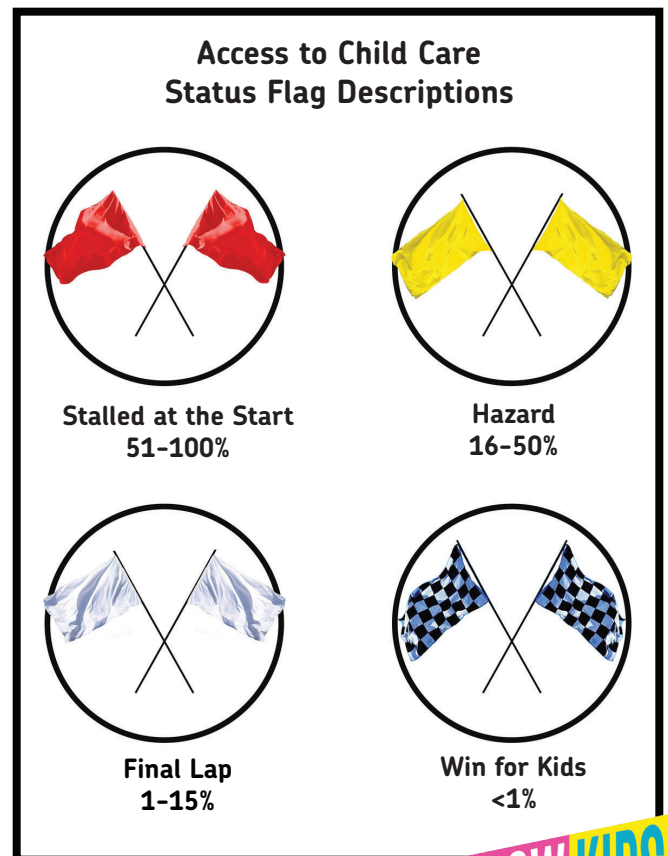
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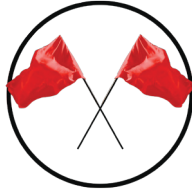


More than 70% of Vermont kids under age 6 are likely to need some form of child care because their parents are in the labor force.

How well is that need for child care being met for kids in Franklin County?

96% of infants and toddlers likely to need care in Franklin County do not have access to high-quality programs.

Infant Access Status: **Stalled at the Start**



98% of infants likely to need care don't have access to **high-quality*** programs.



65% of infants likely to need care don't have access to any **regulated**** programs.

Toddler Access Status: **Stalled at the Start**



94% of toddlers likely to need care don't have access to **high-quality** programs.



26% of toddlers likely to need care don't have access to any **regulated** programs.

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- Contact your Let's Grow Kids field coordinator to get involved in the campaign: Brittany Nevins, brittany@letsgrowkids.org

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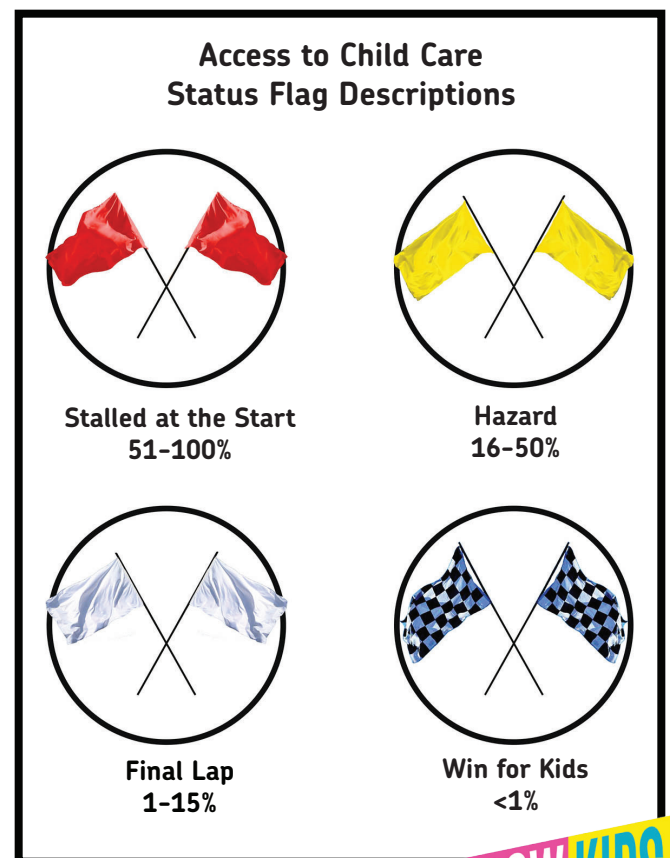
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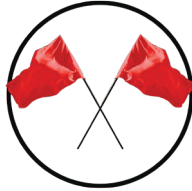


More than 70% of Vermont kids under age 6 are likely to need some form of child care because their parents are in the labor force.

How well is that need for child care being met for kids in Grand Isle County?

81% of infants and toddlers likely to need care in Grand Isle County do not have access to high-quality programs.

Infant Access Status: **Stalled at the Start**



90% of infants likely to need care don't have access to **high-quality*** programs.



67% of infants likely to need care don't have access to any **regulated**** programs.

Toddler Access Status: **Stalled at the Start**



64% of toddlers likely to need care don't have access to **high-quality** programs.



16% of toddlers likely to need care don't have access to any **regulated** programs.

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TAKE ACTION

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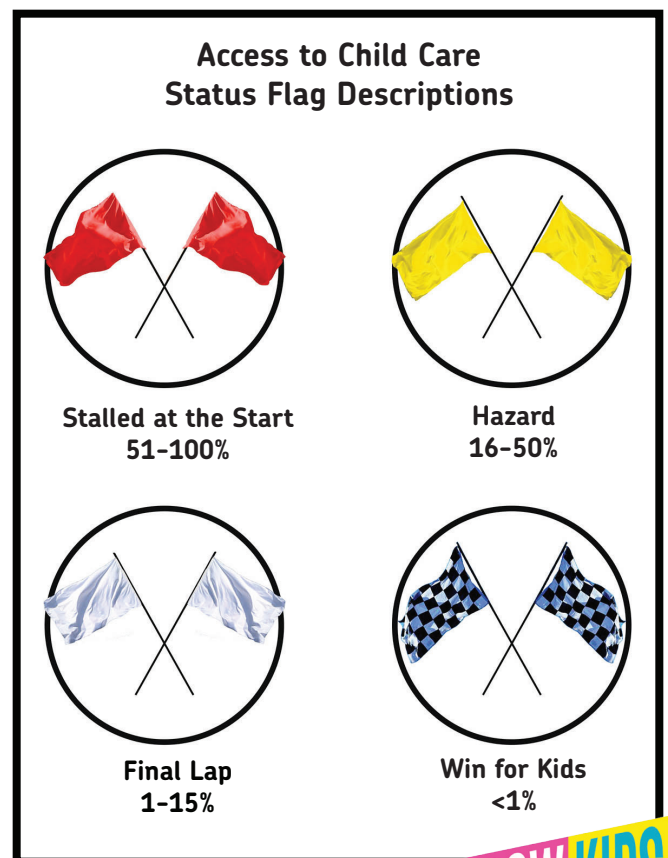
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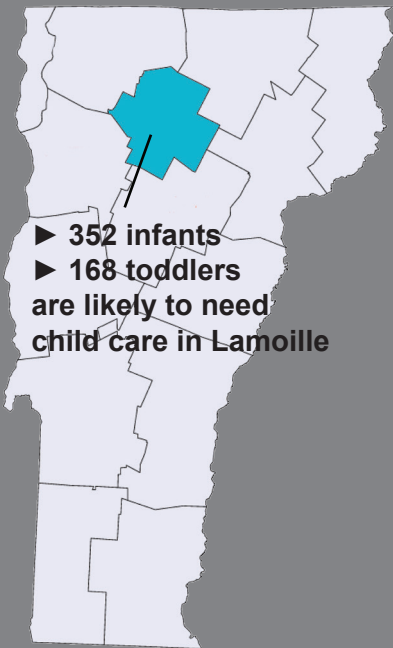
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▶ 352 infants
▶ 168 toddlers
are likely to need
child care in Lamoille

More than 70% of Vermont kids under age 6 are likely to need some form of child care because their parents are in the labor force.

How well is that need for child care being met for kids in Lamoille County?

72% of infants and toddlers likely to need care in Lamoille County do not have access to high-quality programs.

Infant Access Status: **Stalled at the Start**



82% of infants likely to need care don't have access to **high-quality*** programs.



59% of infants likely to need care don't have access to any **regulated**** programs.

Toddler Access Status: **Stalled at the Start**



50% of toddlers likely to need care don't have access to **high-quality** programs.



0% of toddlers likely to need care don't have access to any **regulated** programs.

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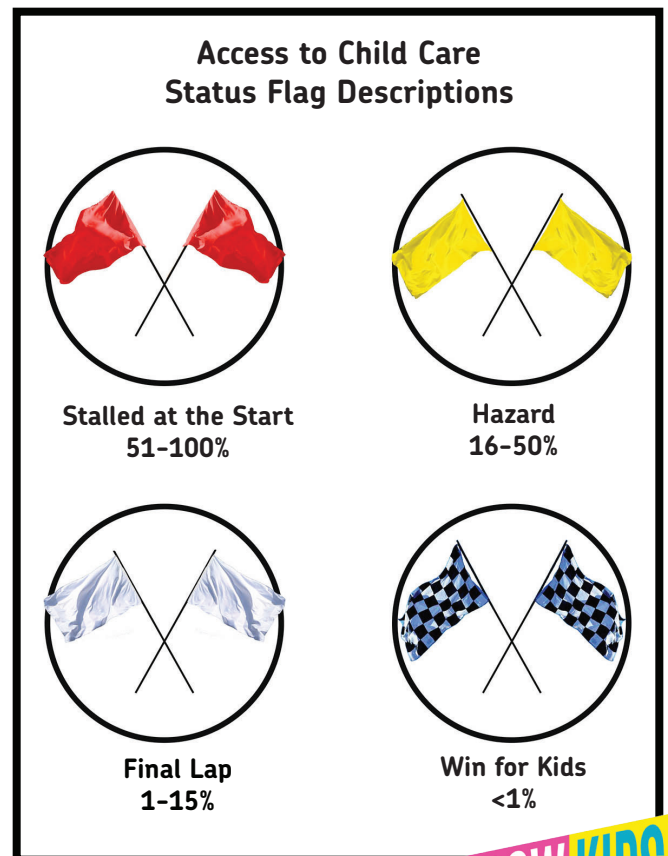
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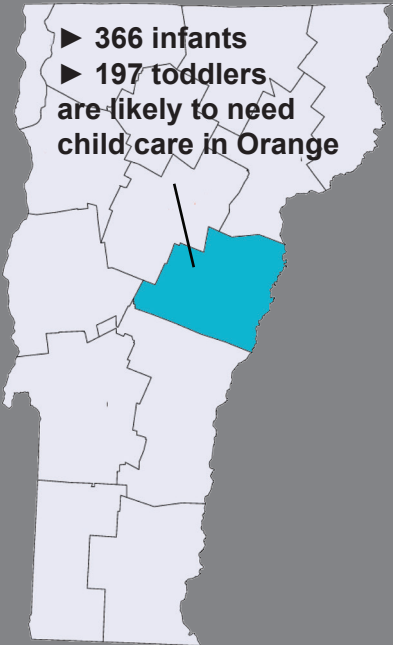
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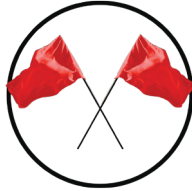


More than 70% of Vermont kids under age 6 are likely to need some form of child care because their parents are in the labor force.

How well is that need for child care being met for kids in Orange County?

83% of infants and toddlers likely to need child care in Orange County do not have access to high-quality programs.

Infant Access Status: **Stalled at the Start**



88% of infants likely to need care don't have access to **high-quality*** programs.

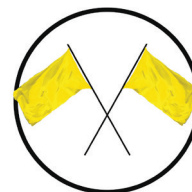


74% of infants likely to need care don't have access to any **regulated**** programs.

Toddler Access Status: **Stalled at the Start**



74% of toddlers likely to need care don't have access to **high-quality** programs.



47% of toddlers likely to need care don't have access to any **regulated** programs.

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- ▶ Contact your Let's Grow Kids field coordinator to get involved in the campaign: Maroni Minter, maroni@letsgrowkids.org

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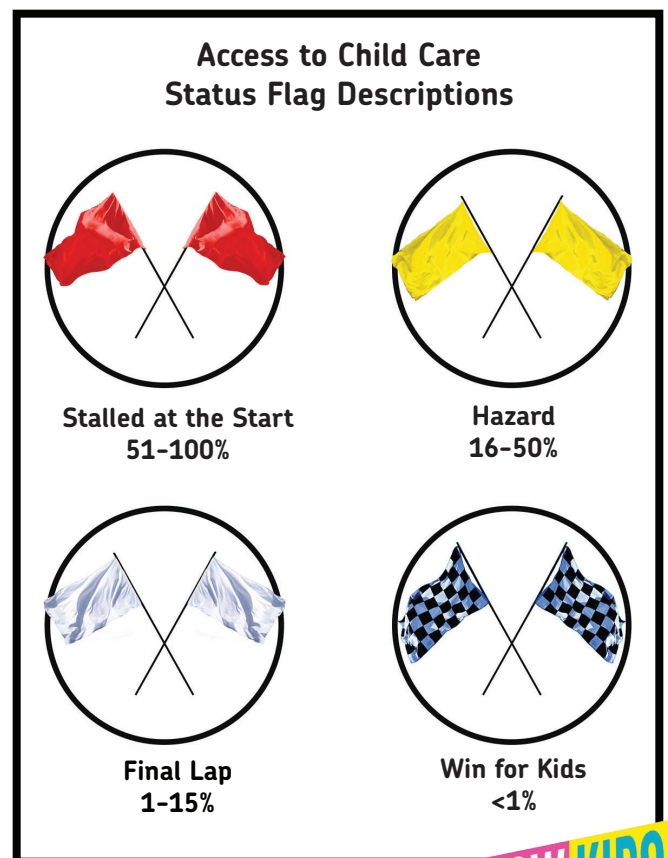
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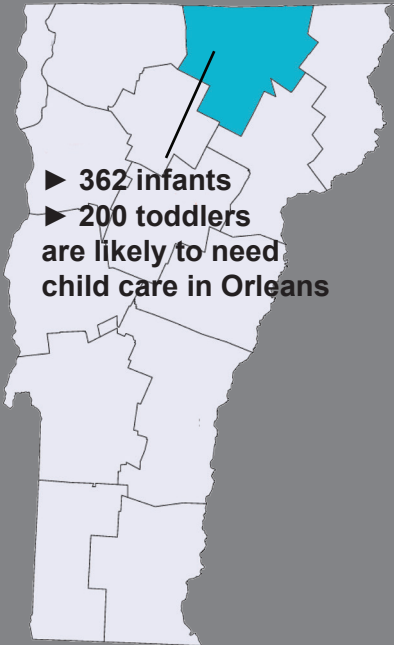
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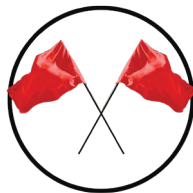
How well is that need for child care being met for kids in Orleans County?

93% of infants and toddlers likely to need care in Orleans County do not have access to high-quality programs.

Infant Access Status: **Stalled at the Start**

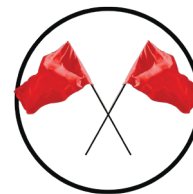


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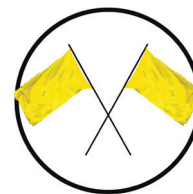


65% of infants likely to need care don't have access to any **regulated**** programs.

Toddler Access Status: **Stalled at the Start**



90% of toddlers likely to need care don't have access to **high-quality** programs.



37% of toddlers likely to need care don't have access to any **regulated** programs.

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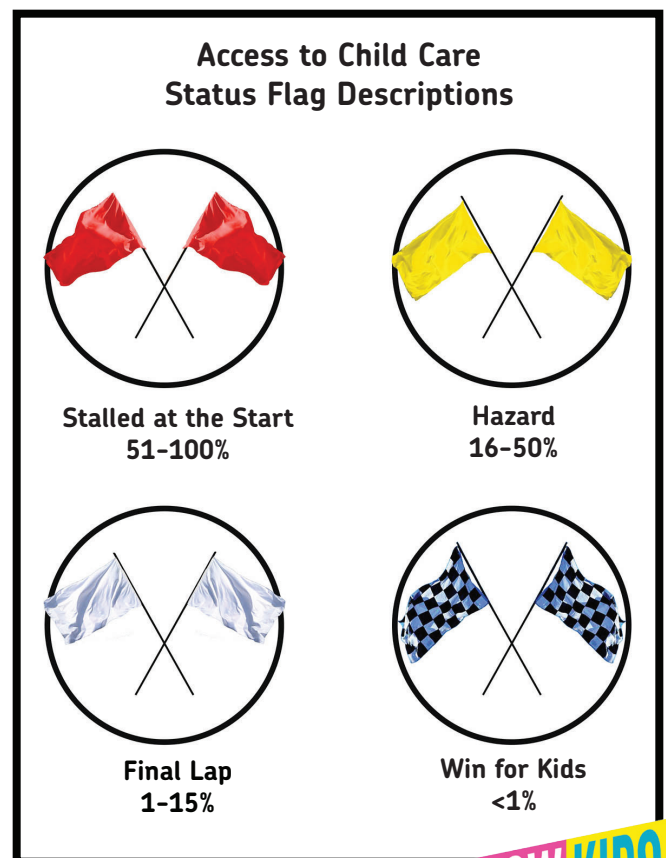
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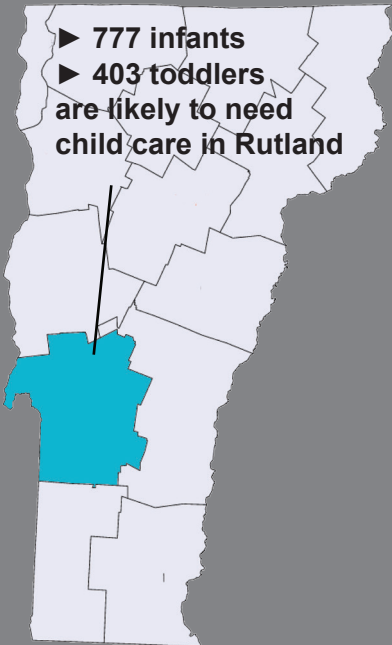
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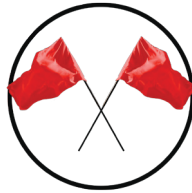


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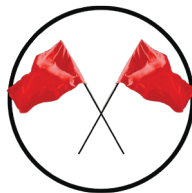
How well is that need for child care being met for kids in Rutland County?

87% of infants and toddlers likely to need care in Rutland County do not have access to high-quality programs.

Infant Access Status: **Stalled at the Start**

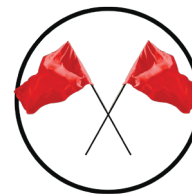


89% of infants likely to need care don't have access to **high-quality*** programs.

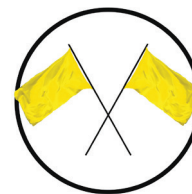


63% of infants likely to need care don't have access to any **regulated**** programs.

Toddler Access Status: **Stalled at the Start**



82% of toddlers likely to need care don't have access to **high-quality** programs.



24% of toddlers likely to need care don't have access to any **regulated** programs.

See what the status and flags mean on the back. ▶

**See how high-quality is defined on the back. ▶*

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TAKE ACTION

- ▶ Read the full report on access to high-quality child care for infants and toddlers statewide at letsgrowkids.org.
- ▶ Contact your Let's Grow Kids field coordinator to get involved in the campaign: Shayla Zammuto, shayla@letsgrowkids.org

Vermont has a child care challenge. Statewide, more than 79% of infants and toddlers likely to need child care don't have access to high-quality programs. Vermont families and child care providers need our support to strengthen resources for our early care and learning programs.

WHAT DO WE MEAN BY HIGH-QUALITY?

In Vermont, regulated child care programs can participate in the state's quality recognition and improvement system, called STARS (STep Ahead Recognition System). A program can receive a quality recognition level ranging from 1 star to 5 stars. Based on this system, when we talk about high-quality programs, we generally mean programs with a 4- or 5-star recognition level.

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HOW DO WE DEFINE INFANTS & TODDLERS?

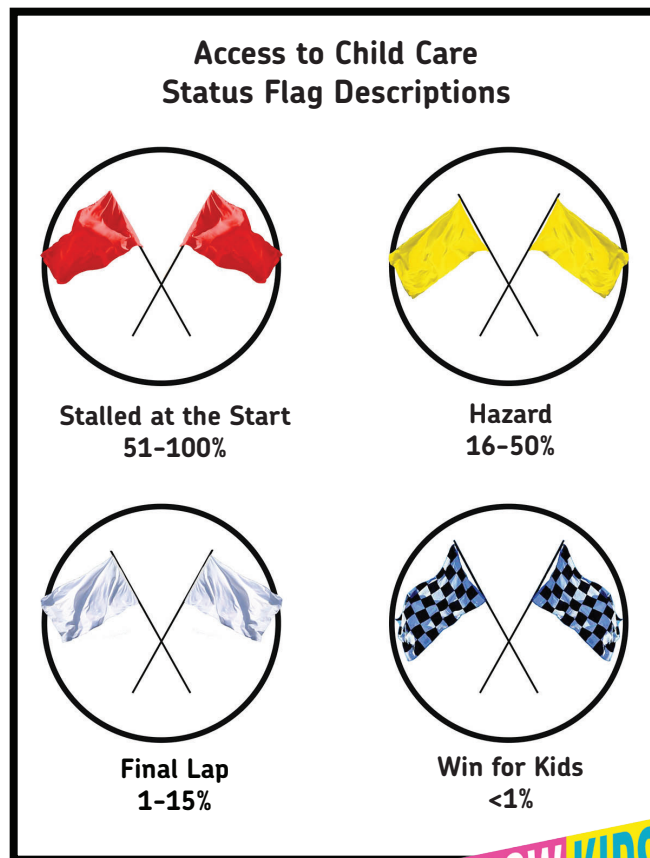
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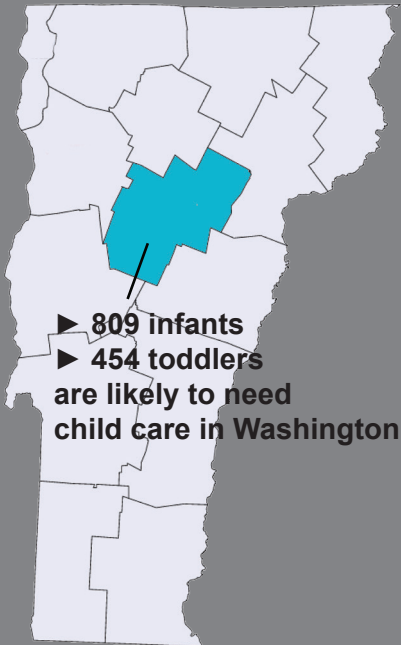
AFFORDABILITY

Quality child care is expensive for both Vermont families and child care providers.

We know that many Vermont families struggle to pay for child care. Middle-income families with two working parents and two young children spend between 28% and 40% of their income on child care. That's over \$19,000 a year—more than the cost of full-time, in-state tuition at a Vermont State college.

We also know that many child care workers in Vermont don't earn very much. On average, a Vermont child care worker makes \$24,850, often without benefits. That's less than the annual salary Vermont considers a "livable wage"—the amount a person needs to make to afford basic needs like housing, food and transportation.



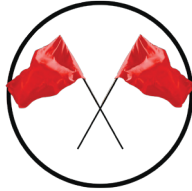


More than 70% of Vermont kids under age 6 are likely to need some form of child care because their parents are in the labor force.

How well is that need for child care being met for kids in Washington County?

91% of infants and toddlers likely to need care in Washington County do not have access to high-quality programs.

Infant Access Status: **Stalled at the Start**

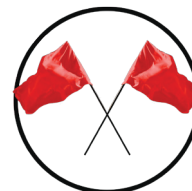


93% of infants likely to need care don't have access to **high-quality*** programs.

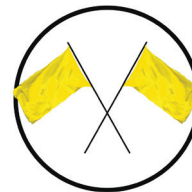


66% of infants likely to need care don't have access to any **regulated**** programs.

Toddler Access Status: **Stalled at the Start**



87% of toddlers likely to need care don't have access to **high-quality** programs.



33% of toddlers likely to need care don't have access to any **regulated** programs.

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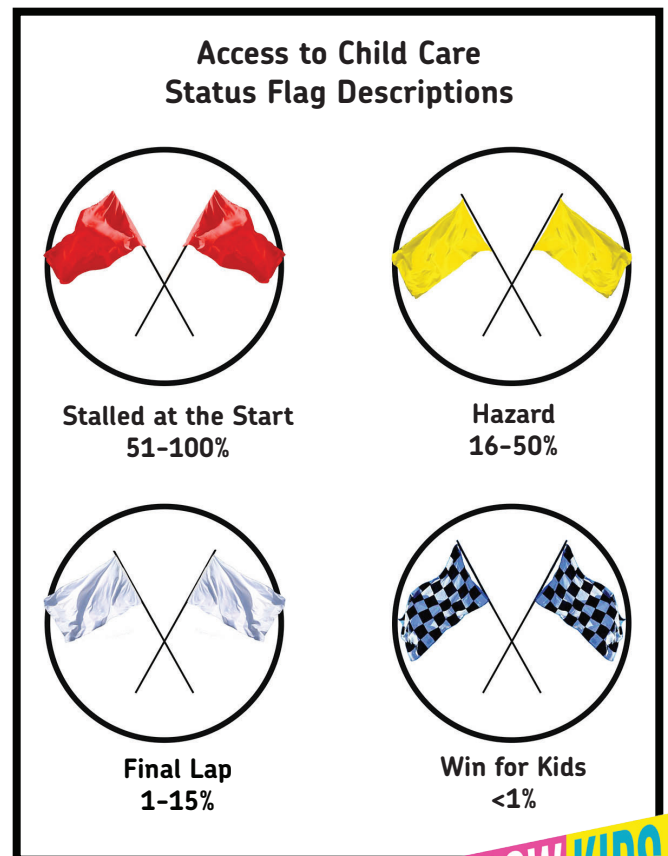
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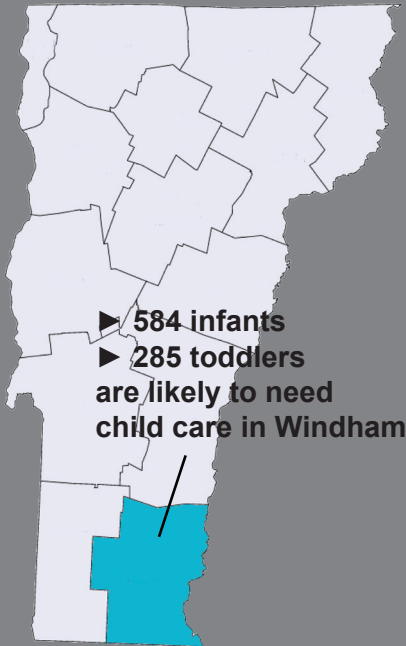
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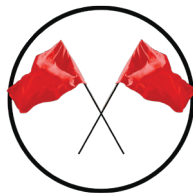
How well is that need for child care being met for kids in Windham County?

73% of infants and toddlers likely to need care in Windham County do not have access to high-quality programs.

Infant Access Status: **Stalled at the Start**

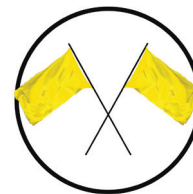


85% of infants likely to need care don't have access to **high-quality** programs.



68% of infants likely to need care don't have access to any **regulated*** programs.

Toddler Access Status: **Stalled at the Start**



48% of toddlers likely to need care don't have access to **high-quality** programs.



15% of toddlers likely to need care don't have access to any **regulated*** programs.

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TAKE ACTION

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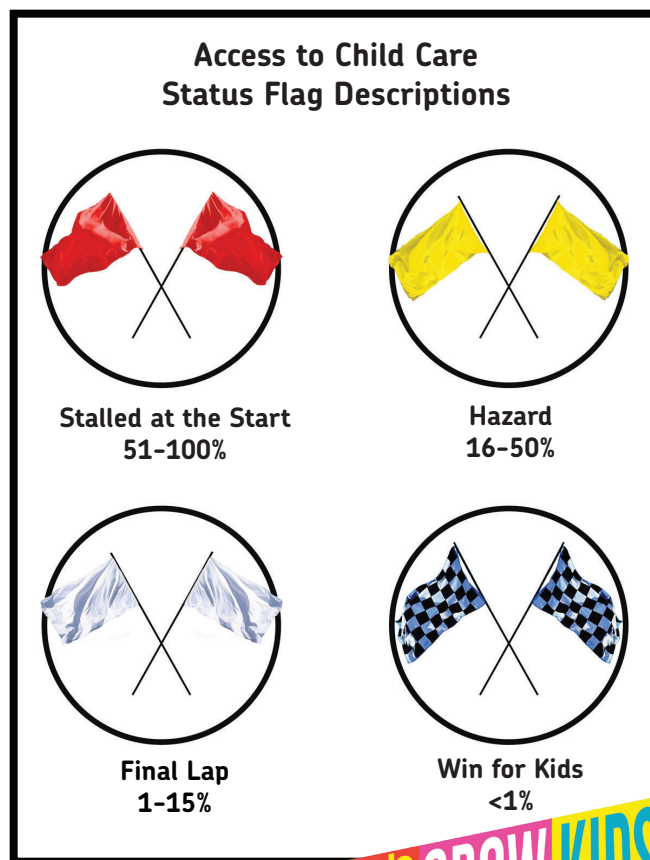
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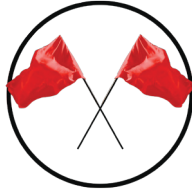


More than 70% of Vermont kids under age 6 are likely to need some form of child care because their parents are in the labor force.

How well is that need for child care being met for kids in Windsor County?

71% of infants and toddlers likely to need care in Windsor County do not have access to high-quality programs.

Infant Access Status: **Stalled at the Start**



79% of infants likely to need care don't have access to **high-quality*** programs.



64% of infants likely to need care don't have access to any **regulated**** programs.

Toddler Access Status: **Stalled at the Start**



56% of toddlers likely to need care don't have access to **high-quality** programs.



27% of toddlers likely to need care don't have access to any **regulated** programs.

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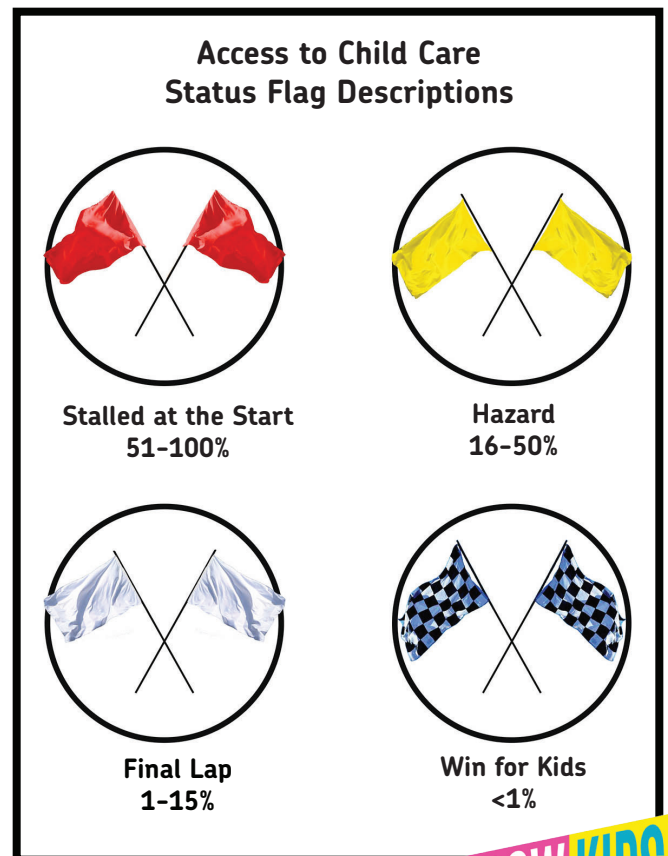
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How We Conducted Our Analysis

Methodology

As an initial step to evaluate child care supply and demand in Vermont, data from regulated (licensed or registered) early care and learning providers was analyzed in conjunction with population estimate data to determine how closely capacity matches estimated need for care for infants and toddlers in Vermont.

Data on all active child care providers who are licensed and registered with the state (collectively referred to as regulated child care providers) as of December 2015 was obtained from the Child Development Division of the Vermont Department for Children and Families.

The regulated child care provider data set included information on two measures of capacity: licensed capacity (the maximum number of slots licensed programs are allowed to care for) and provider-reported desired capacity (the number of slots a provider actually offers). The regulated child care provider data was sorted based on provider-reported desired capacity, as the work group determined this measure of capacity to be the most accurate reflection of the current capacity of regulated providers. Providers who do not offer slots for at least one of the age groups of interest (infants and toddlers) were removed from the data set. Next, duplicates were removed from the list, as some registered or licensed providers renewed their registration/license during the course of the reporting quarter reflected in the data set and therefore had more than one entry.

Once the data set was limited to infant- and toddler-related providers, most non-reoccurring child care providers were removed from the data set. This decision was based on the assumption that non-reoccurring programs provide temporary or non-regular child care for families. Non-reoccurring early care and learning providers are those that provide child care on an occasional or as-needed basis such as resort-based child care that provides temporary care for tourists and Vermonters while parents or guardians participate in activities or seasonal programs (such as summer camps) that do not offer regular child care or early learning programs for families. Some non-reoccurring child care programs based at resorts, such as Stratton, hold a separate license for employee-only child care or operate a year-round child care program that is utilized regularly by staff and/or community members. For such cases, the child care provider data was included in the data set. Further research should be conducted to estimate the number of resort employees who utilize non-employee-only (i.e., guests and community members) resort-based care as their primary source of child care.

Once most non-reoccurring child care providers were removed from the data set, the total statewide infant and toddler (IT) early care and learning program supply was determined by calculating the total provider-reported desired capacity for each age group of interest. The total IT supply data was then further segmented to calculate the high-quality IT supply by summing the data for programs that have a 4- or 5-star designation in the state's quality recognition and improvement system, known as STARS (STep Ahead Recognition System).

The data for both the IT supply and IT high-quality supply were sorted by county to determine county-specific supply totals for each age group of interest.

To determine the potential demand for child care, the work group developed a proxy for demand: children likely to need care. The likely to need care population was determined by analyzing US Census Bureau data on the percent of children under the age of six in Vermont with all parents in the labor force at the state and county levels and against population estimate data. To conduct this analysis, the Vermont Department of Health's population estimate by age and by county data set for 2014, "Vermont Population Estimates 2014," was downloaded from the Department of Health's website. The population for each age group of interest was determined by summing the total statewide population for each age group. For infants, the population total for children ages 0 and 1 were summated. For toddlers, the population total for children age 2 was used.

Data on the US Census Bureau's estimates of the percent of children under the age of six was downloaded from Vermont's clearinghouse for early childhood data, Vermont Insights, a project of Building Bright Futures. This included both a statewide estimate of the percent of children under six in Vermont with all available parents in the labor force and county-specific percentages of children under the age of six with all available parents in the labor force.

US Census Bureau percentages were then applied to Vermont Department of Health population estimate data to determine both statewide infant and toddler likely to need care (LTNC) populations as well as county-specific LTNC populations.

The LTNC population total for each age group was then compared to the estimated supply of care for each age group, both statewide and by county, to determine whether supply did or did not meet estimated demand for the relevant LTNC population.

Key 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 analysis.

- The child care capacity data used for this study is based on provider-reported desired capacity in the Bright Futures Information System (BFIS). If a licensed provider did not have information listed in the data set for reported desired capacity, licensed capacity data was used in place of provider-reported desired capacity. For registered home-based providers, if desired capacity was not reported, it was assumed that the provider was able to care for two infants and two toddlers.
- For this analysis, it was assumed that Vermont's current population is similar to the 2014 population estimates from the Vermont Department of Health and that the 2014 population data is a sufficient proxy for approximating the number of current children in the state.
- Definition and assumptions for access to care:
 - Statewide Analysis
 - For this analysis, it was assumed that all infants and toddlers likely to need care had equal access to every program in the state. The analysis does not account for considerations such as some regulated programs being limited to a particular population, such as Head Start. The analysis does not account for other limiting factors such as cost, geographic access (families living in the northern part of a county not wanting to drive to the southern part of the county to utilize child care) or transportation access (a family's ability to use personal or public transit to access an early care and learning program).
 - County-Level Analysis
 - The analysis assumed that all infants and toddlers likely to need care in a given county had equal access to providers. Additionally, the county-level analysis does not account for families seeking early care and learning programs 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 (families living in the northern part of a county not wanting to drive to the southern part of the county to utilize child care) or transportation access (a family's ability to use personal or public transit to access an early care and learning program).

- For the statewide analysis, the likely to need care population was assumed to be 70.4% of the total age group population. This is based on the US Census Bureau’s American Community Survey estimate that 70.38% of children under 6 in Vermont have all available parents in the labor force. For the county-level analysis, the likely to need care population was based on the county-specific percent of children under 6 in the given county who have all available parents in the labor force, as reported by Vermont Insights.
 - It was also assumed that the estimates of children under 6 with all parents in the labor force applies evenly across all age groups within Vermont’s under 6 population.
- For the purposes of this analysis, high-quality early care and learning was defined as providers who have a current rating of either 4 or 5 stars in the STARS program.
- An important caveat in this analysis is that the total capacity data included “after-school” and “morning and evening care” programs. These programs often serve as transitional care providers for families before or after the family’s primary care provider’s program starts or ends for the day. This most likely overestimates regulated child care capacity at both the county level and state level.

APPENDIX

Appendix: Table 1 – Percent of Children Under 6 With All Available Parents in the Labor Force by County

County	County-Specific Percent of Children Under 6 With All Parents in the Labor Force
Addison	70.10%
Bennington	68.88%
Caledonia	70.52%
Chittenden	70.11%
Essex	80.07%
Franklin	68.46%
Grand Isle	70.11%
Lamoille	67.91%
Orange	68.74%
Orleans	69.71%
Rutland	70.16%
Washington	74.15%
Windham	72.20%
Windsor	70.40%

Appendix: Table 2 – Infant Population Information by County

County	Infant Population	Number of Infants Likely to Need Care	Total Reported Desired Infant Capacity	Total Reported Desired Infant Capacity for High-Quality Providers
Addison	660	463	162	54
Bennington	690	475	237	120
Caledonia	572	403	176	68
Chittenden	3243	2274	1015	467
Essex	95	76	16	4
Franklin	1147	785	277	19
Grand Isle	117	82	27	8
Lamoille	518	352	145	62
Orange	532	366	94	44
Orleans	520	362	127	20
Rutland	1108	777	289	87
Washington	1091	809	275	55
Windham	809	584	185	87
Windsor	974	686	249	142

Appendix: Table 3 – Toddler Population Information by County

County	Toddler Population	Number of Toddlers Likely to Need Care	Total Reported Desired Toddler Capacity	Total Reported Desired Toddler Capacity for High-Quality Providers
Addison	290	203	104	73
Bennington	333	229	241	128
Caledonia	293	207	178	68
Chittenden	1579	1107	1060	516
Essex	53	42	16	4
Franklin	621	425	315	24
Grand Isle	63	44	37	16
Lamoille	248	168	178	84
Orange	286	197	105	51
Orleans	287	200	126	20
Rutland	575	403	306	72
Washington	612	454	305	58
Windham	395	285	243	147
Windsor	536	377	276	166

Appendix: Table 4 – County-Level Analysis of Access to Regulated Care

County	Infants LTNC Without Access to Regulated Care	Toddlers LTNC Without Access to Regulated Care
Addison	Stalled	Hazard
Bennington	Hazard	Win for Kids
Caledonia	Stalled	Final Lap
Chittenden	Stalled	Final Lap
Essex	Stalled	Stalled
Franklin	Stalled	Hazard
Grand Isle	Stalled	Hazard
Lamoille	Stalled	Win for Kids
Orange	Stalled	Hazard
Orleans	Stalled	Hazard
Rutland	Stalled	Hazard
Washington	Stalled	Hazard
Windham	Stalled	Final Lap
Windsor	Stalled	Hazard

Appendix: Table 5 - County-Level Analysis of Access to High-Quality, Regulated Care

County	Infants LTNC Without Access to High-Quality Care	Toddlers LTNC Without Access to High-Quality Care
Addison	Stalled	Stalled
Bennington	Stalled	Hazard
Caledonia	Stalled	Stalled
Chittenden	Stalled	Stalled
Essex	Stalled	Stalled
Franklin	Stalled	Stalled
Grand Isle	Stalled	Stalled
Lamoille	Stalled	Hazard
Orange	Stalled	Stalled
Orleans	Stalled	Stalled
Rutland	Stalled	Stalled
Washington	Stalled	Stalled
Windham	Stalled	Hazard
Windsor	Stalled	Stalled

Endnotes

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- ⁱ Child Action Solutions for Employee Child Care:
<http://www.childaction.org/providers/booklets/docs/Solutions%20for%20Employee%20Child%20Care.pdf>
Accessed April 2016
- ⁱⁱ Shellenback, Karen. "Child Care & Parent Productivity: Making the Business Case." Cornell University, 2004:
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- ⁱⁱⁱ Harvard University Center on the Developing Child, Brain Architecture Key Concepts:
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- ^{iv} Vermont Insights, Vermont children five and under with all parents in the labor force:
<http://vermontinsights.org/5-years-old-and-under-all-parents-in-labor-force> Accessed April 2016
- ^v National Survey of Early Care and Education:
http://www.acf.hhs.gov/sites/default/files/opre/factsheet_hh_search_for_andPerceptions_of_ece_100114.pdf
Accessed April 2016
- ^{vi} Harvard University Center on the Developing Child, Brain Architecture Key Concepts:
<http://developingchild.harvard.edu/science/key-concepts/brain-architecture/> Accessed April 2016
- ^{vii} Invest in Early Childhood Development as a Means to Deficit Reduction in Vermont:
<http://heckmanequation.org/content/resource/invest-early-childhood-development-means-deficit-reduction-vermont> Accessed April 2016
- ^{viii} Failure to Invest in High-Quality Child Care Hurts Children and State's Economy:
<http://www.mlpp.org/failure-to-invest-in-high-quality-child-care-hurts-children-and-states-economy>
Accessed May 2016
- ^{ix} Build Initiative, Quality Rating and Improvement Systems (QRIS):
<http://www.buildinitiative.org/TheIssues/EarlyLearning/QualityQRIS.aspx> Accessed June 2016
- ^x QRIS Network, QRIS Map, Updated June 2016: <http://qrisnetwork.org/sites/all/files/maps/QRISMap.pdf>
Accessed June 2016
- ^{xi} How Are Vermont's Young Children and Families 2015 Report:
http://buildingbrightfutures.org/wp-content/uploads/2015/03/HAVYCF_3-30-15_web.pdf Accessed April 2016
- ^{xii} Economic Policy Institute: <http://www.epi.org/child-care-costs-in-the-united-states/> Accessed April 2016
- ^{xiii} Vermont Department of Labor: <http://www.vtmi.info/oic3.cfm?occcode=39901100> Accessed May 2016
- ^{xiv} Vermont Child Development Division Child Care Early Childhood Program Licensing Regulations:
http://dcf.vermont.gov/sites/dcf/files/CDD/Docs/Licensing/Early_Childhood_Program.pdf Accessed April 2016
- ^{xv} Vermont Insights, Vermont children five and under with all parents in the labor force:
<http://vermontinsights.org/5-years-old-and-under-all-parents-in-labor-force> Accessed May 2016