WEST CENTRAL MOUNTAINS
ECONOMIC DEVELOPMENT COUNCIL
Valley County • Cascade • Donnelly • McCall • Meadows Valley

NEEDS ASSESSMENT: EARLY CHILDHOOD EDUCATION & CHILDCARE IN THE WEST CENTRAL MOUNTAINS OF IDAHO

> *"Based on the data and a few reasonable assumptions, our region could support 200-300 additional spaces for either childcare or early childhood education offerings in the long term."*

09/10/2020 collaborate@idahoaeyc.org

Early Learning Advisory Committee (ELAC) OVERVIEW:
Members (highlighted indicates team lead)

- Tiffany Dobbs--St. Luke's McCall
- Sara Wolf--Roots Forest School
- Sara Broedecker--McCall Donnelly School District
- Regina Graves--Head Start
- Dylan Martin--Idaho Power
- Shauna Arnold--Cascade Horizons
- Bre Anderson--McCall Library
- Megan Chandler--UI Extension/WCMEDC
- Sherry Scheline--Donnelly Library
- Suzanne Mack--CDH
- Audrey Crogh--Meadows Valley Library
- Andrew Mentzer--WCMEDC (ADMINISTRATOR)

STRUCTURE

Our ELAC meets approximately twice per month to run through data and deliverables, and achieves decision making elements by way of a simple majority vote.

INTRO

In the West Central Mountains Region (WCMR), we have a prolific shortage of early childhood (age birth through 5) resources, which leads to a major strain on families, social systems, employers and most importantly, children. COVID-19 has exacerbated this reality, as well as the loss of the McCall Daycare and Learning Center and contraction of some providers due to new operating limitations observed through the pandemic. Below we explore the data that illustrates a quantifiable need for additional early learning AND daycare capacity.

EXECUTIVE SUMMARY

According to Valley/Adams Head Start data, the WCMR currently has approximately 701 children under the age of 5 (Dept. of Labor data confirms there are approximately 547 children age birth through 5 in Valley Co. and 154 in Adams Co.). Our ELAC identified 28 unique providers of childcare and/or early childhood education in the WCMR, with several either postponing, reducing or eliminating services due to COVID. We had 12 facilities take our online provider survey. Most offer some form of early childhood education (curriculum based). Of our respondents, there are 292 spaces available for children under age 5, indicating a 42% service rate for the region (based solely on respondents). If we captured most major providers in our outreach, and our Idaho Commerce market data (below) indicates that 47.5% of the demand for overall childcare services are met in-region, then we can safely assume that we only have current capacity for about half or slightly less than half of the children under age 5. This assumption is further reinforced by our parent survey, where 47.5% of respondents also indicated hardship or lost income from lack of childcare resources. Over half of respondents rely on more than one childcare provider throughout the week, and 97% indicated a preference for early childcare education options over daycare options. ***Based on the data and a few reasonable assumptions, our region could support 200-300 additional spaces for either childcare or early childhood education offerings in the long term***. With exponential growth in 2020 due to the rural migration caused by COVID (building permits are up 50% year over year in Valley County), the real demand for early childhood education and daycare options likely exceeds 400 spaces.

SECTOR LEAKAGE DATA

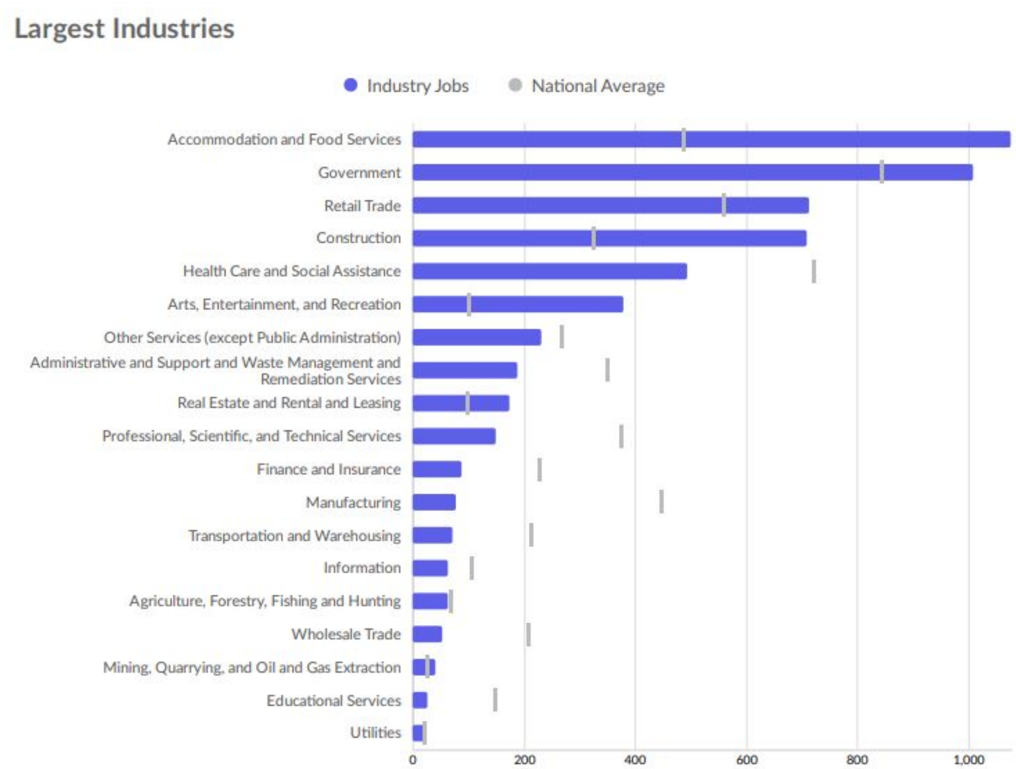
Demand for	Demand met In-region (market)	% Demand met In-region	Demand met by Imports (non-market)	% Demand met by Imports	Total Demand
Child Day Care Services	$574,957	47.5%	$636,209	52.5%	$1,211,165

SOURCE: EMSI/Idaho Commerce

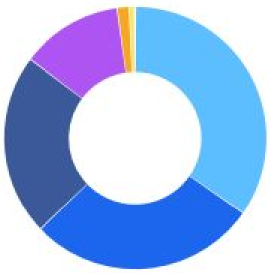
BASE COMMUNITY PROFILE DATA
Source--Gem State Prospector/Idaho Commerce & EMSI. It should be noted that there are some slight variances between the Labor Market Data, EMSI data and Commerce Gem State Prospector data referenced in this report, but none of those differences have been deemed significant

- Valley County
  - Population: 10,847
  - Labor Force: 4,712
  - Bachelor's Degree+ Attainment: 31.3%
  - Household Median Income: $57,997
  - Average Commute: 15 minutes
- Adams County:
  - Population: 4,174
  - Labor Force: 1,759
  - Bachelor's Degree+ Attainment: 20.9%
  - Household Median Income: $46,088
  - Average Commute: 18 minutes

Valley County industry info--below (Adams County data is available HERE):



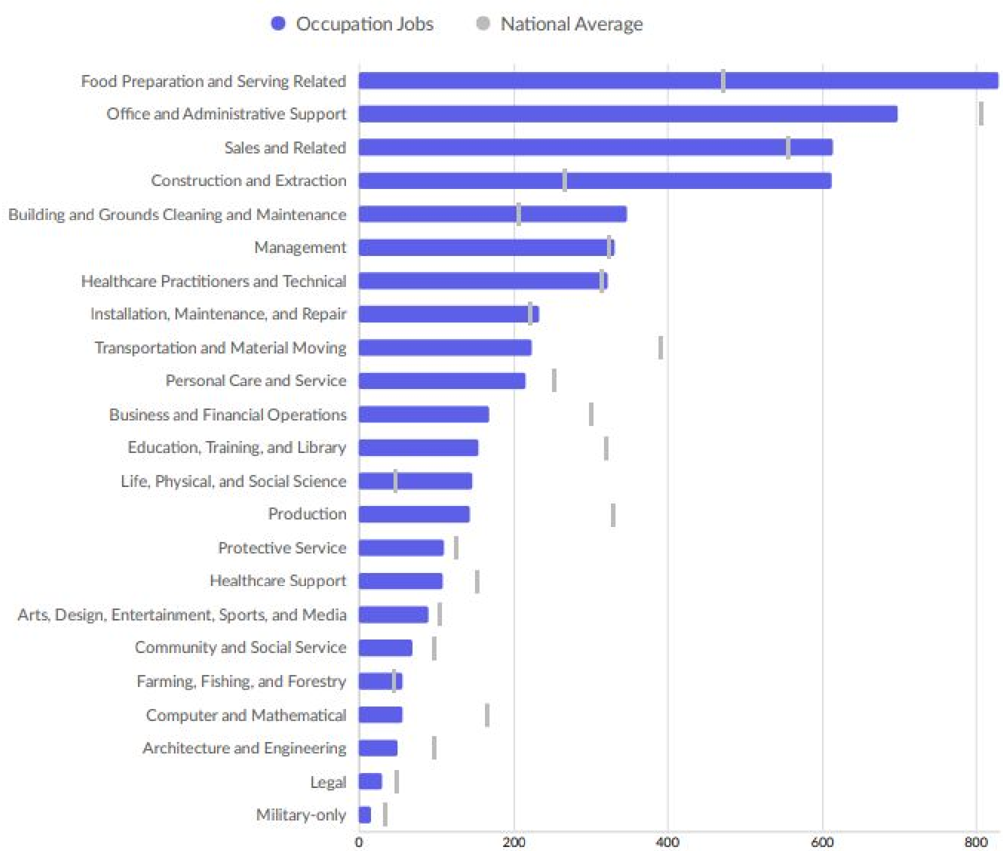
Business Size



	Percentage	Business Count
1 to 4 employees	34.6%	259
5 to 9 employees	28.2%	211
10 to 19 employees	22.4%	168
20 to 49 employees	12.6%	94
50 to 99 employees	1.5%	11
100 to 249 employees	0.7%	5
500+ employees	0.1%	1

**Business Data by DatabaseUSA.com is third-party data provided by Emsi to its customers as a convenience, and Emsi does not endorse or warrant its accuracy or consistency with other published Emsi data. In most cases, the Business Count will not match total companies with profiles on the summary tab.*

Largest Occupations



Birth - Age 5 ten year population projection Valley County (2017-2027 Idaho Dept. of Labor):

YEAR: 2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
POP: 514	507	528	547	564	578	588	595	600	605	609

WICAP 2019 Assessment Profile:

VALLEY CO.	Funded EHS & HS		Avg. Atten-dance		IEP/ IFSP		Homeless		Foster Care		Parent Incarceration		Domestic Violence		Substance Abuse		Child Abuse/ Neglect		Non-English		Military Family	
Program Year	*18*	*19*	*18*	*19*	*18*	*19*	*18*	*19*	*18*	*19*	*18*	*19*	*18*	*19*	*18*	*19*	*18*	*19*	*18*	*19*	*18*	*19*
Data in Numbers	20	28			2	3	4	4	1	0	4	3	4	2	3	4	0	0	7	7	0	0
Data in Percentages				87%	10%	9%	20%	14%	5%	0	20%	11%	20%	7%	15%	14%	0	0	35%	25%	0	0

Report Area	Total Households	Households Receiving SNAP Benefits	Percent Households Receiving SNAP Benefits
Report Location	100,719	15,642	**15.53%**
Adams County	1,736	139	8.01%
Boise County	3,004	279	9.29%
Canyon County	69,303	11,727	16.92%
Gem County	6,404	822	12.84%
Owyhee County	4,190	640	15.27%
Payette County	8,571	1,182	13.79%
Valley County	3,532	339	9.6%
Washington County	3,979	514	12.92%
United States	118,825,921	15,029,498	12.65%

RESEARCH FRAMEWORK

We created two surveys in accordance with the guidelines established by the Idaho Policy Institute and ACS--one for providers and one for parents. The questions were designed in a manner that provides higher level aggregate data for qualified statements (using word clouds and being able to generally articulate a concept or feeling about the status of a topic in a few words). Concurrently, we drilled down on meaningful quantifiable questions to clearly articulate the need for types of service, location and impacts. The surveys were reviewed and approved by both our ELAC team and ACS before being deployed. The parent survey captured perspectives from respondents via a targeted social media campaign that focused on families with young children (using geotargeting) and an email outreach campaign from area providers who were willing to push the survey out to their parent lists. The provider survey was deployed directly to a targeted list that was assembled by our ELAC. We identified 28 unique providers in our area; 6 appeared to be no longer operating or out of business. 12 took the survey. Most of the major providers in the region participated in our survey, offering a higher degree of confidence in our data.

PROVIDER SURVEY

PARENT SURVEY

KEY TAKEAWAYS: PROVIDERS

The majority (75%) of local providers who took our survey appear to offer some form of early childhood education/curriculum offerings, with the type of facility varying greatly throughout the region. Interestingly, just a quarter of respondents identified as being majority curriculum based, with the majority not following a set curriculum in their program delivery. Most facilities have less than 6 employees, and all providers indicated children were engaged in screen time less than 25% of the time. Most respondents don't regularly use volunteers in their day to day either, which we found to be an interesting outcome given the smaller scale of most of the region's providers. As for educational attainment, all respondents indicated at least a high school education baseline for their employees, with 46% indicating a bachelor's degree or master's degree average education attainment level. 66% of employees work at least 20 hours per week, with 46% of providers offering benefits packages to employees. The average employee wage comes in at $14.09 per hour across childcare and early childhood education providers. The majority of providers offer between 10 and 25 spots for children under age 5. Half of providers offer snack or food service to children. Most facilities service at least one family where English is not the primary language spoken in the household, and most providers offer reduced fee or free service to lower income families. 67% of respondents encounter significant enrollment fluctuations based on seasonality, and 83% DO NOT participate in the STQ program. COVID resulted in employee retention and enrollment reductions for most providers in the spring/summer. Below is a word cloud that captures the general sentiment of providers:

KEY TAKEAWAYS: PARENTS

With 61 responses to our parents survey, we believe we have captured a nice snapshot of perspectives for this analysis. The most important considerations when selecting a provider for either early childhood education or daycare are:

1. Reputation of the provider
2. Price
3. Availability

COVID-19 played a major role in people's childcare experiences. While some folks didn't see much of an interruption, many lost childcare options either temporarily or permanently, which led to lost income and significant hardship in their day to day lives. The optimal scheduling availability ranged from 24 hours a day (for healthcare and on-call sector workers) to just a few morning's a week. Generally, the common response was Monday through Friday from 7:30am until 6pm. Most people spend between 10% and 25% of their household income on childcare services. About 35% of respondents were generally NOT satisfied with their childcare options and 36% were generally satisfied. Another 29% were somewhere in between. Most respondents receive information about childcare options and opportunities from a variety of online sources. 97% of respondents would rather have access to an early childhood education resource than daycare for their child. As for desired amenities, a significant portion of respondents cited social/emotional development as a critical asset in their child's care, followed by more basic needs like a safe environment, access to outdoor play, flexible scheduling and regular access to snack/meal time. Most parents seek services from more than one provider each week. Uniformly, availability and cost were the biggest barriers for most families seeking early childhood education and daycare opportunities. 92% of parents indicated their child(ren) would attend kindergarten. Below is a word cloud that captures the general sentiment of parents:

CONCLUSIONS

As we head into the strategic planning element of the IDAEYC program, we need to pay close attention to the following:

- Current supply is significantly outpaced by demand, and that gap is getting wider each year
- Wage and benefit limitations are sector headwinds
- The level of training and skills employees have differs greatly, however wages are fairly uniform (meaning there is little financial incentive to seek additional training in some cases)
- Seasonality is a major concern/consideration
- There is a lot of frustration over resources and continuity from both parents and providers in this ecosystem
- Quality control (reliable level of service, scheduling and availability) can be a challenge for both parents and providers
- Employer led programs are difficult to scale for most businesses, as the majority have fewer than 10 employees
- Opportunities to sync up the pre-K and kindergarten ecosystems are robust and should be accounted for in planning efforts downstream

SUPPLEMENTS / LINKS / DATA:

- PROVIDER/STAKEHOLDER MASTER LIST
- PROVIDER SURVEY RAW DATA
- PARENT SURVEY RAW DATA
- SECTOR LEAKAGE DATA
- EMSI ECONOMIC OVERVIEW
- WICAP NEEDS ASSESSMENT 2019
- MCCALL LIBRARY PRE-K STORYTIME PARTICIPATION
- IDAHO POWER KNOWN PROVIDER LIST
- HEAD START STUDENT PARTICIPATION/COUNTY/MEAL/HOMELESS DATA
- LABOR MARKET DATA REPORT