

Washington State Child Care Industry Assessment



Report to the Legislature by the Child Care Collaborative Task Force
under 2SHB 1344, Laws of 2019

**COMMUNITY ENGAGEMENT
AND OUTREACH,
DIRECTOR'S OFFICE**

July 1, 2020

REPORT TO THE LEGISLATURE

Lisa Brown, Director

Acknowledgments

The child care industry assessment was made possible by ICF, the Child Care Collaborative Task Force and staff of the Department of Commerce and Department of Children, Youth and Families.

Child Care Collaborative Task Force

2019-20 Role	First Name	Last Name	Organization	Appointed
Tri-Chair, Voting	Amy	Anderson	Association of Washington Business	2018
Tri-Chair, Voting	Luc	Jasmin	Washington Childcare Centers Association and Parkview Early Learning Center	2018
Tri-Chair, Voting	Ryan	Pricco	Child Care Aware of Washington	2018
Voting	Erin	Haick	SEIU 925	2018
Voting	Bob	McCaslin	4th District (R), WA House of Representatives	2018
Voting	Darlene	Peters	Port Gamble S'Klallam Tribe	2020
Voting	Tana	Senn	41st District (D), WA House of Representatives	2020
Voting	Neil	Strege	Washington Roundtable	2018
Voting	Claire	Wilson	30th District (D), WA Senate	2019
Voting	Liv	Woodstrom	The Ounce	2020
Non-Voting	David	Beard	School's Out Washington	2018
Non-Voting	Sarah	Clark	Children's Alliance	2019
Non-Voting	Mary	Curry	Pathways Enrichment Academy	2018
Non-Voting	Sydney	Forrester	Office of the Governor	2019
Non-Voting	Dru	Garson	Greater Grays Harbor Inc.	2018
Non-Voting	Christie	Glassy	Family, Friend and Neighbor Caregiver	2019
Non-Voting	Jennifer	Jennings-Shaffer	Zero to Three	2019
Non-Voting	Ruth	Kagi	Early Learning Ambassador	2018
Non-Voting	Bethany	Larsen	Child Haven / Puget Sound Educational Service District	2018
Non-Voting	Lois	Martin	Community Day Center for Children, Inc.	2018
Non-Voting	ZamZam	Mohamed	Voices of Tomorrow	2019
Non-Voting	Mary Ellen	O'Keefe	Thrive Washington	2018
Non-Voting	Jason	Ramynke	Department of Children, Youth and Families	2019
Non-Voting	Cheryl	Smith	Department of Commerce	2018
Non-Voting	Nicole	Sohn	Greater Spokane Inc. and Journey Discovery Center	2019
Non-Voting	Ginger	Still	Kid's World Childcare	2018
Non-Voting	Faith	Trimble	Capitol Campus Child Care Center	2018
Non-Voting	Jodi	Wall	Educational Service District 112	2019

Washington State Department of Commerce

Cheryl Smith, Director of Community Engagement and Outreach, cheryl.smith@commerce.wa.gov

Jill Bushnell, Policy Advisor, 360.725.2818 or jill.bushnell@commerce.wa.gov

Mary Baldwin, Program Coordinator, 360.725.2815 or mary.baldwin@commerce.wa.gov

1011 Plum St. SE
P.O. Box 42525
Olympia, WA 98504-2525
www.commerce.wa.gov

To request this report in other formats, please call 360.725.4000 (TTY 360.586.0772).

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Attachments:

- [ICF Child Care Industry Assessment Volume I: Report \(169 pages\)](#)
- [ICF Child Care Industry Assessment Volume II: Appendices \(142 pages\)](#)

Letter from the Task Force Tri-Chairs

July 1, 2020

The Child Care Collaborative Task Force provides this assessment of Washington’s child care industry during a time of great health and socio-economic challenges in the United States. The child care industry has been tremendously impacted by these challenges. This assessment shares data solidifying the need for intentional supports to ensure that care is accessible and affordable in a landscape where too many families are having a hard time accessing services. **Before the pandemic, over half a million children in Washington did not have access to licensed child care.**

Child care is a necessity for thousands of Washington families. In late June of this year, about one in five child care providers temporarily closed according to Child Care Aware of Washington. Providers are working hard to stay open despite rapidly changing enrollments and operating requirements. Without access to quality, affordable care, working adults with children who need care throughout the day are unable to return to the workforce, and essential workers may find it difficult to continue to report to their places of employment. This assessment includes an important analysis of the current state during the pandemic, and how the industry has changed since the beginning of 2020.

The task force is uniquely positioned to witness, record and help respond to this rapidly changing uncertain landscape. Members hail from all facets of the child care system, including key stakeholders, business and government representatives. This broad diversity of perspectives allowed the group to digest and robustly discuss the pre-pandemic and current mid-pandemic state of the industry. The task force reached an understanding that demand outstrips supply, paying for child care is difficult for most parents, many providers struggle to balance revenue and expenses due to high program operation costs, and navigating child care issues affects work performance and the ability to find work. The industry assessment backed up what we observed anecdotally: Black, Indigenous, People of Color (BIPOC) communities have less access to resources and investments. To remove these disparate outcomes, the task force will apply an anti-racist framework to policy recommendations.

The task force is set to continue the work of developing a child care cost estimation model, along with workforce compensation and subsidy policy recommendations, this December. This work culminates with a comprehensive strategy and implementation plan in approximately June 2021.

While the environment may have changed since the legislature directed the task force to explore how the child care industry impacts our state, one overarching theme has remained the same: there is a need to ensure that affordable, accessible, quality child care is available for Washington families. The task force is navigating these real-time challenges, while balancing the unpredictability of the coming months, to craft a set of balanced, informed and thoughtful recommendations to meet this goal.

With gratitude,

Amy Anderson
Association of Washington
Business

Luc Jasmin
Washington Childcare Centers Association &
Parkview Early Learning Center

Ryan Pricco
Child Care Aware of Washington

“If we don't stand up for children, then we don't stand for much.” Marian Wright Edelman

Letter from Commerce Director Dr. Lisa Brown

July 1, 2020



The COVID-19 pandemic has brought to the forefront issues the Child Care Collaborative Task Force was created to address: primarily, that our state lacks a sufficient supply of accessible, affordable, high-quality child care to allow parents to participate in the workforce and children to thrive. Historic numbers of people in Washington are out of work, working less or working from home. Parents face new challenges of balancing job responsibilities and caring for children with many child care programs closed, grandparents and other high-risk caregivers off-limits and schools focused on remote learning. Lack of safe child care options will push many parents, especially women, out of the labor force. This will in turn reduce the labor pool for businesses and employers ready to resume and expand, harming the economic recovery. Without child care, we can have no economic recovery.

The industry assessment revealed that although 61% of young children live in households where all parents work, our state has sufficient licensed child care capacity for only 41% of young children and 5% of school-age children. Lack of accessible, affordable child care affects parents' job prospects, productivity and career decisions—with different impacts reported across incomes, races/ethnicities, genders and areas of the state. **Nearly one in five (18.3%) of parents surveyed turned down a job offer or promotion due to child care issues**, more often among Black and Native American parents. **Nearly half (47%) of unemployed parents found child care issues a barrier to seeking employment**—51% among female job-seekers compared to 41% among male job-seekers. Clearly, a dramatic investment in child care is needed for robust, equitable economic recovery in Washington State.

Last year, the task force submitted to the legislature and governor a vision and initial recommendations to improve our child care system, calling for a unified approach to increasing access to child care. This industry assessment report is a continuation of that work. The data and analysis put a finer point on our understanding of disparities in child care access and service delivery. The task force will apply this learning to model costs associated with operating a high-quality child care program, identify compensation strategies to sustain a trained, culturally responsive, compassionate child care workforce, calibrate our state's subsidy program so child care is affordable for more working families, and develop a comprehensive child care access strategy.

Commerce is committed to supporting the task force and the child care system. Commerce's Early Learning Facility Fund has invested in child care infrastructure around the state. We recently partnered with Child Care Aware of Washington to procure and distribute essential health and cleaning supplies for child care providers. We are preparing to invest in community planning that will build momentum to implement long-term solutions to local child care capacity challenges, focusing on underserved and historically marginalized families and communities. We are honored to be a partner in this important work.

I would like to thank the Child Care Collaborative Task Force chairs, members and staff for their dedication and efforts to address the critical, timely issue of child care access—many, while dealing with their own child care challenges. I look forward to the task force's policy conversations and strategy development, and hope readers find this report informative.

Lisa J. Brown, Ph.D.
Director

Introduction

The Washington State Child Care Collaborative Task Force (task force) presents to the legislature and to Governor Inslee this assessment of Washington's child care industry. The task force was established in 2018 to make policy recommendations about the child care system to better meet the needs of families, employers and child care providers. This child care industry assessment report is the second in a series of four task force reports to the legislature. All four reports are summarized in Figure 1. The task force will continue to review and integrate knowledge obtained from the child care industry assessment and related analyses. This document review is vital to support the task force in preparing upcoming reports slated to be submitted to the legislature and governor in December 2020 and June 2021. The December 2020 report includes three parts: (1) a tool for modeling the costs associated with providing licensed child care at varying levels of quality based on Early Achievers, the state's quality improvement system; (2) workforce compensation policy recommendations; and (3) policy recommendations and an implementation plan to improve child care subsidies offered via the state's program, Working Connections Child Care (WCCC). The June 2021 report will consist of a four-year child care access strategy and implementation plan.

The Department of Commerce (Commerce) contracted with ICF, a global consulting firm, to assess Washington state's child care industry to fulfill [RCW 43.330.529](#) and [RCW 43.41.800](#). ICF, with research partners MomsRising, Fran Kipnis, and Capito Associates, completed the industry assessment in collaboration with Commerce, the Department of Children, Youth and Families (DCYF) and the task force between December 2019 and June 2020. ICF's full industry assessment report is attached and available [online](#).

The child care industry assessment highlights systemic capacity issues that existed prior to the COVID-19 pandemic, which appeared as the research and data collection was underway. The assessment shows a comprehensive view of the child care system up to March of this year. The findings demonstrate the need for and reasons why even before the pandemic, the child care system, with ever increasing costs, struggled to meet the capacity needs of families seeking care. Now, the child care system is strained even more.

To better understand the deep changes that have occurred, ICF carried out an initial examination of COVID-19 impacts on child care supply. More analysis is needed to fully understand the pandemic's temporary and lasting effects on the child care industry.

The task force will use the industry assessment, the interactive [child care industry insights dashboard](#) developed by ICF, and the growing body of knowledge within the child care community to fulfill its charge to develop appropriate strategies, plans and recommendations to expand child care access throughout Washington state.

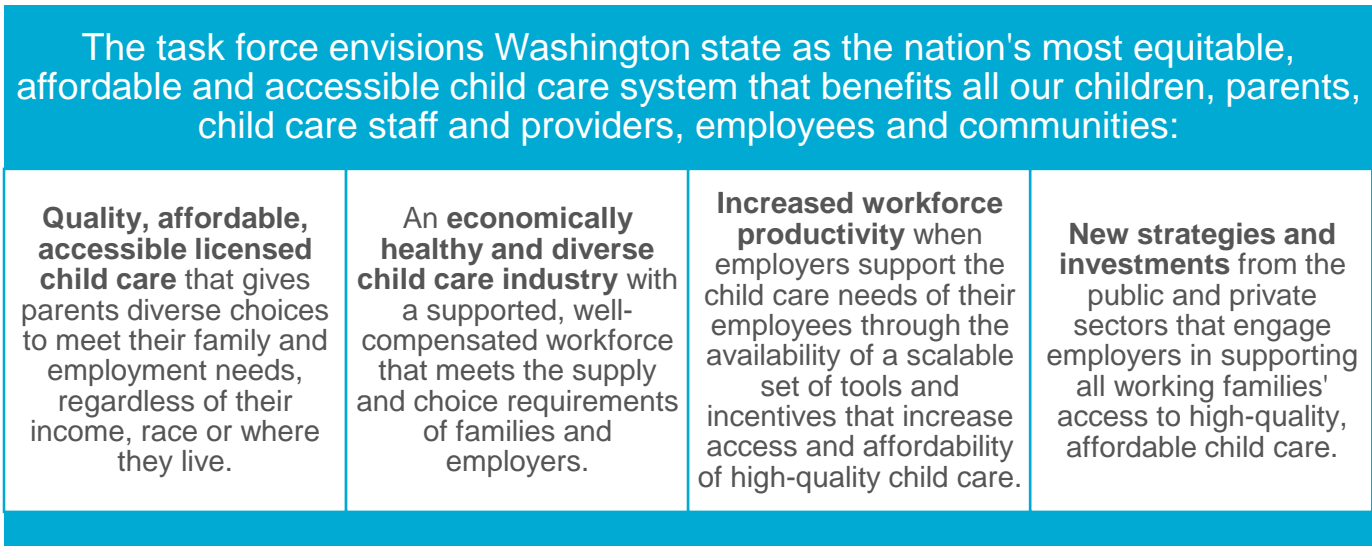
Figure 1: Child Care Collaborative Task Force Milestones



Background

In its [initial report](#), the task force developed a broad vision for child care in Washington. This vision is displayed in Figure 2 below. The initial report's findings and recommendations revealed that the child care industry is one in which providers receive low levels of public investment and lack civic support to stay in business while meeting regulatory standards. Most see the child care market as valued for the public good and welfare of children. But even with this knowledge, little has been done to buttress these businesses that are an integral part of our state's economy.

Figure 2: Child Care Collaborative Task Force Vision



The initial report provided ample information about the complexities of child care access but did not delve into the status of child care supply and demand in our state. The industry assessment quantified and clarified much of what the task force had found anecdotally to be true. For example, working families that are relatively low income, but not low income enough to benefit from public assistance, struggle to access child care; families pay high proportions of their income on child care; race/ethnicity and social-economic disparities affect child care access and service delivery.

Quality

The pandemic has reinvigorated discussions about child care quality: What is quality? Is quality defined the same way across cultures and communities? To what extent do our quality standards, such as the state's quality rating and improvement system, Early Achievers, allow for differing and culturally influenced definitions of quality?

During the child care industry assessment, the task force discussed definitions of, and challenges related to defining, quality. Much of the discussion centered on topics that the task force will address in the December 2020 report to the legislature and governor, including the cost of quality and what quality levels imply for the child care workforce in terms of education, credentials and equivalencies.

The task force discussed what "high quality" means in Washington when providing feedback to ICF on the child care industry insights dashboard and related supply-and-demand analysis. Different quality standards exist for licensed child care centers and family homes, and programs licensed as school-age only programs. Licensed child care centers and family homes may opt in to be rated through Washington's quality rating and

improvement system, [Early Achievers](#). Participation in Early Achievers is required by providers that accept Working Connections Child Care subsidies or offer state-funded preschool¹. Early Achievers has five levels: Level 1 is defined as "licensed child care - the foundation for high quality." Level 2 includes providers participating in quality improvement and working toward meeting Early Achievers [quality standards](#). Levels 3-5 reflect programs that have been rated and demonstrated quality.

ICF initially assessed the supply of high-quality child care and parents' drive time to access high-quality care using Early Achievers Levels 4 and 5 as the measures of "high quality." This sparked a discussion among task force members on what it means to provide quality child care. Many task force members noted that a lot of effort goes into rating at higher levels of Early Achievers (Level 3 and above), which can be challenging without funding to support achieving quality standards. Some members of the task force felt strongly that ICF's analysis related to "high-quality" child care programs should be expanded to include providers rated at Early Achievers Level 3 or above. It was also noted that just because a program does not participate in Early Achievers, that does not mean the program is not high quality. Because of the concern expressed around access to high quality sites, ICF updated the dashboard and added analyses of drive time and proximity of families to high-quality child care programs, based on the Early Achievers criteria.

School-age child care programs are not rated through Early Achievers. At this time, there is not a state-adopted standard equivalent to Early Achievers for school-age child care programs. However, many providers have participated in the [Youth Program Quality Initiative](#) and the [Expanded Learning Opportunities Quality Initiative pilot](#), guided by the [Washington State Afterschool and Youth Development Quality Standards](#), which provide a quality framework for the school-age field. Quality standards for school-age child care programs were discussed in relation to the school-age child care supply-and-demand analysis, as well as the child care cost estimate model the task force will provide in the December 2020 report. The task force will address in future reports quality as it relates to school-age child care.

Achieving Equitable Racial Outcomes

The research underpinning this report depicts an alarming trend where more Black, Indigenous, People of Color (BIPOC) communities have less access to quality child care, using the definition of quality outlined in this report. Many BIPOC educators, along with their white peers, receive wages that are low in relation to the life-changing work they do each day. Others continue to provide socially engaging, nurturing children's environments, often without access to health/dental care, benefits and other employment incentives.

To have a well-rounded analysis on how BIPOC and underserved families are specifically impacted by lack of child care, parent engagement sessions were conducted to discover insights about their experiences. See Table 2 below for more details about these findings.

As the work of the task force continues, there is an increased urgency to address the history of systemic and structural racism that has impacted children and families. Systemic/institutional racism not only affects the capacity of BIPOC communities to obtain affordable housing, food security and employment opportunities, but also a parent's ability to place one's offspring in a child care setting that meets family needs. To achieve equitable learning, health, social-emotional development, and school readiness outcomes, the task force understands the need to remove institutional barriers that keep families, and the child care industry, from achieving equitable outcomes for all children.

¹ Washington's state-funded preschool program is Early Childhood Education and Assistance Program (ECEAP).

At the inception of this work, several task force members pushed to have a lens of racial equity theory of change applied to all future policy recommendations. This discussion will continue and will likely result in identification of a specific framework and tools to use as the task force abides by its commitment to racial equity and anti-racist policies and practices. This tool is expected to be in place prior to the distribution of the December 2020 and June 2021 recommendation reports.

Industry Assessment Overview

ICF's industry assessment report contains a description of the supply and demand for child care; a geospatial analysis of the drive time distance to available child care; summaries of three approaches to understanding Washington families' needs and preferences for care, from their own perspectives; a literature review of previous findings on child care; and an economic impact analysis that measured and projected the economic and fiscal impacts of limited access to child care in Washington state over a 10-year period (2019-2028). Tables 1-4 summarize statistics and findings.

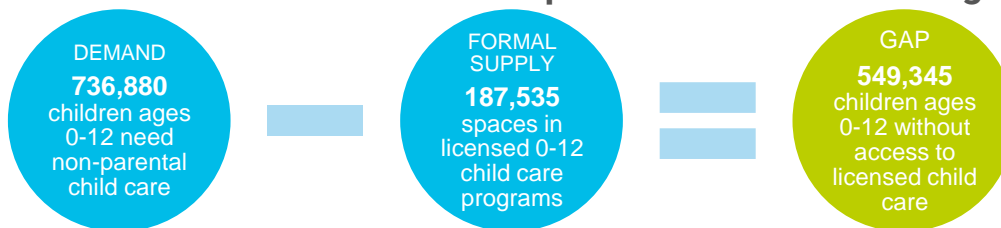
Key Findings

Access is a challenge

The industry assessment findings revealed child care access barriers that are more pronounced depending on race/ethnicity, income and geography. ICF's parent survey identified differences in challenges perceived by parents, such as agreeing with the statement that child care has caused their family financial hardship. Some parents reported in the last year turning down a promotion or job offer due to child care issues.

ICF's supply-and-demand analysis compared locations and demographics of "simulated" families approximated by using U.S. Census data with locations and attributes of nearby licensed child care per drive-time and proximity. The supply-and-demand analysis revealed themes in the availability of child care capacity that varied by family demographics and attributes of child care business models. Table 2 lists some of these differences. Additional analysis is available in Sections V and VI of the attached industry assessment report. Figure 3 below shows the estimated child care capacity gap of 549,345 spaces that results from subtracting the licensed child care supply from child care demand.² ICF estimated that 96,390 children through age four have non-licensed, home-based caregivers (family, friends, neighbors, nannies, etc.) but ICF did not produce similar estimates for non-licensed, home-based care of school-age children.

Figure 3: Estimated Licensed Child Care Gap for Children Birth through Age 12



Affordability is a challenge

ICF's survey used three methods (two surveys and a series of interviews) to assess parent needs and preferences for child care. Parents indicated that affording tuition costs was the greatest barrier or challenge to accessing child care. The industry assessment showed that middle-income families were less likely to receive public or employer-based financial assistance than low- or high-income families. The U.S. Administration for Children and Family Services has recommended that state-administered child care subsidy programs, such as Working Connections Child Care, limit a family's copayments to no more than 7% of a family's income to ensure these copayments are not a cost barrier for families receiving assistance.³ The industry assessment found median-income families across Washington seeking full-time child care would

² The U.S. Census Bureau found in the 2018 American Community Survey that 61% of Washington children under age six have all available adults in the labor force. The demand in Figure 3 applies this percentage (61%) to Washington children birth through age 12.

³ "Family Copayment Contribution." U.S. Dept. of Health & Human Services, Administration for Children & Families. <https://ccdf-fundamentals.icfcloud.com/family-copayment-contribution>.

need to pay a much greater proportion of household income than 7% to cover median child care tuition. Tables 2 and 4 summarize affordability challenges and financial burdens faced by parents seeking child care.

Data Tables

Table 1 below contains statistics and estimates from ICF's child care industry assessment and DCYF's Office of Innovation, Alignment, and Accountability that begin to tell the story of Washington's child care industry. In March 2020, there were 187,535 licensed child care spaces for approximately 1.2 million children through age 12. ICF's supply-and-demand analysis in Section VI of Volume I of the industry assessment report found that approximately 118,000 families with young children (birth through age 4) live in areas with inadequate child care supply, or child care deserts. Parents surveyed by ICF who used non-parental child care reported use of multiple child care arrangements. See ICF's industry assessment report for additional analysis and findings.

Table 1: Washington State Child Care Industry Estimates

Child Care Demand	Population of children birth through age 12 in Washington state	1,208,000 children
	Percentage of households with children under age 6 where all parents work	61% of households
	Population of working parents with children birth through age 12	983,183 parents
	Percentage of children birth through age 12 in two or more child care arrangements*	40% of children
	Average time a child spends in child care per week as reported by parents*	<20 hours per week
	Percentage of parents who need child care outside traditional hours*	25% of parents
Child Care Supply	Number of licensed child care providers (centers, homes, school-age-only)**	5,432 providers
	Capacity of licensed child care (centers, homes, school-age-only)**	187,535 children
	Number of young children (birth through age 4) in informal child care	96,390 children
	Number of families with young children (birth through age 4) living in a child care desert	117,884 families
	Number of counties where over half (50%) of families with young children (birth through age 4) live in a child care desert	15 counties
Child Care Workforce Characteristics	Number of active early childhood educators in the child care workforce	35,782 educators
	Percentage of early childhood educators with race/ethnicity other than white	50% of educators
	Percentage of early childhood educators who are bilingual (30%, n=10,735) or who have limited English proficiency (3%, n=1,073)	33% of educators
	Percentage of early childhood educators with (any) verified higher education attainment (n=12,125)	34% of educators
	Percentage of educators with verified higher education who direct or manage a child care center (n=2,501) and have a bachelor's degree or higher (n=1,401)	56% of center directors/managers
	Percentage of educators with verified higher education who are family home child care owners/teachers (n=2,474) and have bachelor's degrees or higher (n=247)	10% of family child care owners/teachers
Estimated Economic Impact	Estimated average foregone state revenue due to child care inaccessibility	\$1.03 billion per year
	Estimated average foregone personal income due to child care inaccessibility	\$16.9 billion per year
	Percentage of parents not working but seeking employment (n=106) who consider lack of child care a barrier to obtaining employment (n=49)	47% of parents seeking employment
	Percentage of parents who reported they had experienced financial hardship as result of child care issues	34% of parents

Sources: *ICF May 2020 survey of Washington parents with children birth through age 12, n=1,536, in ICF Washington Child Care Industry Assessment Report Volume I, 2020; **DCYF, March 9, 2020

Table 2 below lists parent subgroups with higher frequencies of self-reported or observed child care barriers or challenges. Parents of all income levels, higher education attainment, race/ethnicity, and ages of children, reported challenges. Parents with higher education and income more often reported job-related challenges. Parents with lower levels of educational attainment and low to moderate income more often reported financial hardships. ICF's supply-and-demand analysis found that families of middle income (200% to 500% of the federal poverty level, or household income of \$52,400 to \$131,000 for a family of four) were more likely to live in an area with low capacity of nearby child care relative to demand, also known as a child care desert. Parents with incomes between \$50,000 and \$99,000 were less likely to report receiving financial assistance for child care, including public subsidies and employer-based supports.

Table 2: Frequency of Child Care Barriers or Challenges Reported or Observed by Washington Parent Subgroups in ICF Child Care Industry Assessment

More likely to...	Parent Subgroup
Agree that child care issues negatively impact the parent's job	Non-Hispanic Black parents Single working parents, two working parents High level of education (graduate degree) High income (\$200,000 or more annually) Have both young (birth through age 4) and school-age children (age 5 through 12)
Report having taken time off work due to child care issues in the last 12 months	Households where all parents work Asian/Pacific Islander parents Live in urban area Higher education, higher income
Agree finding child care that fits the parents' work schedule is a challenge	Households where all parents work High income (\$200,000 or more annually) Have young children (birth through age 4)
Report having turned down a job offer or promotion due to child care issues in the last 12 months	Black or American Indian/Alaska Native parents Have at least one young child (birth through age 4) Less than a college degree <u>or</u> have a graduate degree Live in rural area
Agree that child care issues have caused financial hardship	Non-Hispanic Black or American Indian/Alaska Native parents Moderately low income (\$40,000 to \$59,999 annually) Single working parents Live in urban area Have only young children (birth through age 4)
Agree finding affordable child care is a challenge	Have young children (birth through age 4) Lower income (concern increases as income decreases)
Report receiving <u>no</u> public, employer-based or other financial assistance for child care	Non-Hispanic white parents Mid-level income (\$40,000 to \$99,999 annually) Have only school-age and older children Live in rural area
Have insufficient nearby child care capacity	Mid-level income (200% to 500% of federal poverty level, or \$52,400 to \$131,000 annually for a family of four)

Table 3 below summarizes differences in child care usage reported by respondents to ICF's parent survey. Some parent subgroups, based on race/ethnicity, income and urban or rural area, indicated more frequent use of center-based licensed child care or family caregivers. Usage of licensed family home child care is not reflected in the table and will require further analysis of the survey data to assess. The table also lists parent subgroups that reported their children spent relatively more time in non-parental child care.

Table 3: Child Care Usage Reported by Washington Parent Subgroups in ICF Child Care Industry Assessment

More likely to report...	Parent Subgroup
Using a licensed child care center as a primary child care arrangement	Black parents Higher income Live in urban area
Using care with a non-parental family member (informal care) as a primary child care arrangement	Asian/Pacific Islander, American Indian/Alaska Native or Hispanic parents Live in rural area
Children spend longer periods of time in non-parental care	Non-Hispanic white parents Low income (\$20,000 to \$39,999 annually) Live in rural areas Have young children (birth through age 4)

Source: ICF Washington Child Care Industry Assessment Report Volume I, 2020

The industry assessment provided a detailed analysis of the portion of income required by median-income families across the state to pay full-time licensed child care tuition. See Section VI, Supply and Demand for Child Care in Washington, in Volume I of ICF's industry assessment report for details and maps.

Table 4: Percentage of Income Required for Median-Income Families Seeking Full-Time Child Care at Median Price, Range of Percentages by County

Example	Two Parents	Single Mom
One preschooler in a licensed child care center	9% to 15% of income	13% to 63% of income
One infant in a licensed family child care home	10% to 15% of income	15% to 65% of income
One infant, one preschooler in a licensed center	up to 35% of income	more than 150% of income
One school-age child in school-age child care program, licensed center or licensed family child care home	2% to 4% of income	2% to 15% of income

Source: ICF Washington Child Care Industry Assessment Report Volume I, 2020; analysis was specific to single mothers

Impacts of COVID-19

Our nation is experiencing a pandemic more severe than most of us have ever encountered. The COVID-19 outbreak prompted the State of Washington to issue a state of emergency in February, followed by school closures, stay-at-home orders, public health mandates and restrictions on non-essential business activities and large gatherings. The industry assessment was underway during this unprecedented public health crisis. Child care was impacted as widespread layoffs, increased telework, remote learning, physical distancing and other factors created a lack of demand for child care services. With many child care providers forced to close, some permanently, child care may be harder to find than ever before. And now, with many school districts providing only remote learning options, school-age care is even more vitally important for working families, particularly families farthest away from educational justice. Child Care Aware of Washington, a child care advocacy and support organization, has monitored and supported child care providers throughout the pandemic, and reported the following statistics in July 2020⁴:

20% of child care providers are temporarily closed

44% of child care early educators have been laid off or furloughed

64% of child care businesses surveyed reported a 50% or greater decrease in income due to the pandemic

There is no information available on how the pandemic may have disproportionately affected BIPOC child care providers. The task force will seek to understand these effects and address them in future policy recommendations and child care access plans.

Providers have noted that operating costs are significantly higher than usual (DCYF has estimated 30% higher⁵) due to increased sanitation and hygiene, smaller child-to-staff ratios, increased need for substitute staff and limited capacity (note that although maximum group size has increased from 10 to 22 in a room, some rooms still have limited capacity due to physical distancing requirements). Further, many providers and staff are reluctant to return to work and risk exposure to the virus. This is particularly true now as child care staff question how it's safe for child care teachers to work with children while it is not safe for public school teachers. Providers that have remained open have noted an increase in child behavioral issues and needs for mental health support. The task force found, through an informal poll of 21 center and family home providers, the following themes expressed when asked to describe how the pandemic has impacted their program:

- **Providers are experiencing an incredible loss of income** due to reduced enrollment, parents unable to afford care anymore, and parents fearful of taking their children to group settings.
- **Operating a child care program during this pandemic is expensive and confusing.** Centers for Disease Control (CDC) guidance has increased costs, supplies have been expensive and difficult to obtain at times, programs have lost staff due to COVID-19 concerns and unstable revenue. Guidance from several entities (CDC, DCYF, Department of Health, governor, president, etc.) is confusing and contradictory, and costly regulations remain in place. This is problematic when child care centers are trying to determine the safest course of action when there is a COVID-19 exposure or positive test result within the center.
- **Ongoing effects of the pandemic on child care supply and demand are hard to predict.** The unpredictability of temporary closures (up to 14 days at a time) due to symptoms of COVID-19 that may present in children or staff, exposure to individuals with COVID-19 while outside of the program, and actual cases of COVID-19, are also costly to programs. The Families First Coronavirus Response Act requirement

⁴ Child Care Aware of Washington. "COVID-19 Coronavirus Employer Resources Webinar Series." Tacoma: CCA of WA, 2020.

⁵ DCYF. "COVID-19 Impacts." Presentation at Association for Washington Business COVID-19 Employer Resources Webinar Series: Child Care Update, Olympia, WA, July 8, 2020. Olympia: DCYF, 2020. <https://vimeo.com/showcase/6919365/video/436596561>

to pay staff for up to 80 hours if a COVID-19 related closure occurs⁶, coupled with refunding family's tuition during the closure, is unsustainable. The unpredictability of demand for care is exacerbated when enrolled families choose to withdraw from programs when a COVID-19 related temporary closure occurs. During the pandemic, this scenario could happen several times, increasing the likelihood of permanent closure.

- **Supports that have been essential to the ability of child care programs to remain open have either run out or will soon**, such as Payroll Protection Program (PPP) grants or loans, CARES Act grants, subsidy income continuity and continued tuition payments from parents seeking to hold their child's spot.
- **The K-12 situation continues to be in flux, which will put more pressure on both providers and parents** as they may be expected to help with, coordinate and monitor learning for school-age children. Challenges with remote learning for school-aged children, technology issues and physical distancing compound the uncertainty felt by parents and providers. Many districts have announced that school will start online only, which puts even greater stress on an already fragile child care system.
- **There are concerns that the responsibility to fill the gap for school-age families will fall into the laps of child care providers without financial or supplies support.** School districts will need to work with community-based organizations, make space available in schools, provide daily custodial cleaning support, coordinate remote learning (i.e., schedule Zoom classes by grade band at the same time across schools), etc., so that school-age care programs are able to support remote learning and provide full-day child care for working families. School-age care that is accessible and affordable is a necessity, particularly for children farthest away from educational justice.
- **Providers are reporting an increase in behavioral challenges in their programs** as children cope with disrupted routines, families experience hardships and providers adjust child care programs to meet public health guidelines and accommodate remote learning.
- **Operating child care programs during the pandemic offers great risk with few public supports or recognition.** Child care educators, many of whom do not have health insurance, provide a service that enables parents in health care and all other essential jobs to continue working. Child care educators understand the importance of their role for the families they serve. Nonetheless, child care providers did not initially benefit from publicly procured personal protective equipment, financial supports and other resources to protect workforce health and safety and business viability. This has contributed to a sentiment among providers that more should be done to recognize and support child care as essential to economic recovery.

These themes are consistent with a broader survey by Child Care Aware of Washington, summarized in Table 5 below. The limited grants, loans, and resources available to providers have been insufficient to offset the intense strain the pandemic has placed on them. Child Care Aware of Washington found about half of child care centers and over a third of school-age and family home child care providers consider their programs at risk of permanent closure.⁷ Child Care Aware of America has published a [child care supply dashboard](#) that shows providers who are open or temporarily closed by zip code, and the estimated number of open vacancies. As of June 2020, this resource estimated 1,117 of 5,359 providers were temporarily closed, and open child care providers had an estimated 23,042 vacancies.⁸

Meanwhile, the pandemic has pressed families to find safe places for their children as expanded unemployment benefits have expired, workplaces resume on-site activity and schools begin fully remote or hybrid on-site and remote learning. Even if parents can return to work, many are not making the same choices

⁶ "Families First Coronavirus Response Act: Employee Paid Leave Rights." U.S. Department of Labor. <https://www.dol.gov/agencies/whd/pandemic/ffcra-employee-paid-leave>.

⁷ Child Care Aware of Washington. "COVID-19 Coronavirus Employer Resources Webinar Series." Tacoma: CCA of WA, 2020.

⁸ "Washington Child Care Supply: COVID-19." Child Care Aware of America. <https://arccg.is/05uLGi0>.

they did before the pandemic. Some parents are choosing home-based or informal care settings to limit the risk of virus exposure, to minimize changes in children's routines, and to help children participate in remote learning. Parents who have relied on child care subsidies may find fewer providers that accept subsidies, as providers face increased costs. Additionally, some parents need to seek alternative care because their child's caregiver is at high risk of COVID-19.

Table 5: Impacts of COVID-19 on Child Care Providers Observed by Child Care Aware of Washington⁹

Theme	Description	Provider Quote
Financial hardship	Enrollment has decreased by about 54% statewide per a survey completed by over 1,000 child care providers. For most providers that means a dramatic loss of revenue. Some family home child care providers report being the primary or sole income for their household.	<i>"Since childcare is my main source of income, I don't have a way to pay my bills without it. I'm not sure what to do about this."</i>
It's a dilemma	Family home child care providers in a high-risk category due to age and/or health status must make a choice to follow health recommendations or preserve their income.	<i>"My doctor has told me (twice) not to return to work as I am high-risk. I also do not meet any of the health and safety guidelines of the CDC, WHO, HEALTH DEPARTMENT or Governor Inslee's proclamations for reopening...Where do I go for specific assistance for the loss of my total business?"</i>
	Following recommendations to reduce group sizes and enrollments leads to dramatically reduced revenues. Most child care programs must be fully enrolled to break even or generate profit.	<i>"Enrollment is the only thing that will save my program"</i>
Filling the gap left by K-12	Child care has largely stayed open when K-12 schools have closed. This has caused many early learning providers to adapt to meeting an even wider range of developmental needs. (In many cases, child care providers are helping children and families get remote schoolwork done.)	<i>"We need help with school age children and keeping up on the home school requirements...It is overwhelming."</i>
	Families with children in the K-12 system suddenly have additional child care considerations and cost. There is limited capacity to accept children given closures and recommendations to reduce enrollment.	<i>"School age families weren't prepared to pay for full time care. I can't afford to waive their tuition. There should be assistance for these families."</i>

Source: Child Care Aware of Washington, 2020

⁹ Child Care Aware of Washington. "Themes we have been seeing around impact of COVID-19 on child care." Tacoma: CCA of WA, 2020.

COVID-19 and School-Age Child Care

The pandemic has significantly impacted school-age child care. When schools were mandated to close in mid-March 2020, many school-age (and early learning) programs in school buildings were immediately displaced. There will be a greater demand for school-age child care options until schools return to a full-time, in-person schedule. The task force finds it imperative that Washington state policymakers ensure children farthest from educational justice have access to high-quality, school-age care. How school-age child care capacity may grow to meet this demand is unknown. Some school districts and jurisdictions are working to coordinate an approach to child care, including providing space, funding, and technological support for child care providers to support learning as appropriate. A few districts are also developing opportunities to have district staff (such as paraprofessionals) housed in child care programs to support learning platforms and challenges. Partnerships between school districts, child care and community-based organizations have always been important, but now are critical.

Response to Legislative Requirements

Table 6 below summarizes how the industry assessment addresses requirements in [RCW 43.330.529](#) and [RCW 43.41.800](#) and where to find related analysis in ICF's industry assessment report.

Table 6: Crosswalk from Legislation to ICF Industry Assessment Report

Requirement	Description of How Requirement was Addressed	ICF Page #
<p>Children Receiving Child Care by Provider Type and Payment</p> <p><i>RCW 43.330.529(2)(a)(i)-(ii)</i></p>	<p>ICF used DCYF data on licensed child care and public preschool capacity, as well as findings about parent preferences and usage of child care types from the parent survey (Section V), to analyze child care demand (Section VI). ICF estimated there are 47,277 children served by family, friend and neighbor (FFN) caregivers and 42,687 children served by nannies or au pairs. DCYF data showed in March 2020, the state had 187,535 licensed child care spaces. At that time, 54,863 children were authorized for state-subsidized child care (35,022 in licensed centers, 13,596 in licensed family homes and 6,245 receiving care from FFN caregivers). As of July 2020, providers had received payment for the 48,499 children authorized for subsidy who accessed subsidized care (30,224 in licensed centers, 12,748 in licensed homes and 5,527 with FFN caregivers).</p>	<p>Section V, Parent/Family Voices, page 36-103</p> <p>Section VI, Supply and Demand for Child Care in Washington, page 104-141</p>
<p>Demographics of Children Served by Provider Type</p> <p><i>RCW 43.330.529 (2)(a)(iv)</i></p>	<p>Demographics of children served were not available for this industry assessment. Statistics about children who receive subsidies are available in DCYF reports. See parent and family demographic information in ICF Industry Assessment Report Section V.</p>	<p>Section V, Parent/Family Voices, page 36-103</p>
<p>Family Child Care Choices by Family Income Bracket</p> <p><i>RCW 43.330.529 (2)(c)</i></p>	<p>ICF parent perspectives analysis identified family child care choices by family income bracket, including within parent survey results and parent engagement summaries.</p>	<p>Section V, Parent/Family Voices, page 36-103</p>
<p>Demographics of Child Care Providers</p> <p><i>RCW 43.330.529 (2)(a)(v)</i></p>	<p>ICF's industry assessment includes workforce characteristics in the supply-and-demand analysis. The task force will include additional workforce employment, wage, public assistance, and workforce pipeline information in the next report. ICF completed a separate workforce compensation policy analysis that the task force will consider with other extant sources when developing workforce compensation policy recommendations for the December 2020 legislative report.</p>	<p>Section VI.6, Child Care Industry Workforce, page 134-135</p>
<p>Workforce Employment, Wages and Pipeline</p> <p><i>RCW 43.330.529 (2)(f)(i)-(ii)</i></p>		
<p>Characteristics of the Informal Child Care Market</p> <p><i>RCW 43.330.529 (2)(b)</i></p>	<p>ICF's analysis of child care supply and demand describes the characteristics of the informal child care market, including estimates of the children served in this market by age group.</p>	<p>Section VI, Supply and Demand for Child Care in Washington,</p>

Requirement	Description of How Requirement was Addressed	ICF Page #
<p>Visual Representation of Child Care Supply and Demand</p> <p><i>RCW 43.330.529 (2)(d)</i></p>	<p>ICF's child care industry insights dashboard and supply-and-demand analysis provide a visual representation of child care supply and demand by region that identifies areas with the highest need related to child care accessibility and affordability.</p>	<p>page 104-141</p> <p><i>See child care industry insights dashboard on Commerce website</i></p>
<p>Child Care Facilities Needs Assessment</p> <p><i>RCW 43.330.529 (2)(b)</i></p>	<p>The task force found a facility needs assessment tool more valuable than a one-time snapshot of facility needs. ICF's child care industry insights dashboard is an interactive, updatable tool that stakeholders may use to determine the type and number of facilities necessary to address unmet child care capacity needs. The dashboard allows zip code-level analysis to identify geographic areas with concentrated barriers to access.</p>	
<p>Providers Accepting Subsidy</p> <p><i>RCW 43.330.529 (2)(a)(iii)</i></p>	<p>The task force will recommend subsidy policy changes and an implementation plan in the December 2020 legislative report. The December report will include additional information about the subsidy program, including the estimated number of children who receive subsidized care by provider type, reasons why providers do not accept subsidy and the relationship between private pay rates and subsidy rates.</p>	<p>Will be included in the December 2020 report</p>
<p>Relationship between Private Pay Rates and Subsidy Rates</p> <p><i>RCW 43.330.529 (2)(e)</i></p>		
<p>Estimated Costs to the State Economy of Child Care Inaccessibility</p> <p><i>RCW 43.330.529 (2)(b)</i></p>	<p>ICF estimated economic and fiscal impacts by identifying and extrapolating parent and employer impacts of three scenarios that arise when parents lack affordable, reliable child care: lost time at work, turnover and reduction in labor force participation. ICF used the REMI P+ economic model of Washington state to estimate economic and fiscal impacts, including sales and Business and Occupation (B&O) tax impacts. Section VII describes the methodology and results, including lost economic activity, lost tax revenue and direct and indirect effects on labor participation, workplace productivity, and household earnings of working parents who use child care.</p>	<p>Section VII, Economic and Fiscal Impact Analysis, page 142-161</p>
<p>State Employee Child Care Survey Results</p> <p><i>RCW 43.41.800</i></p>	<p>ICF summarized results of the Office of Financial Management's state executive branch employee child care survey in Section V.3, including analysis of the relationship between family child care choices and household income bracket, and a narrative summary of the challenges that state employees face in accessing or paying for child care. The survey was made available to all executive branch employees, asking employees to respond only if they had at least one child ages birth through 12. The total population of state employees with children in this age range was unknown. Estimates reflect survey responses and not necessarily state executive branch totals. The survey provided information about 10,704 children of 6,348 employees.</p>	<p>Section V.3, State Employee Child Care Survey, page 84-101</p>



Washington Child Care Industry Assessment Volume I: Report

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Submitted to:
Child Care Collaborative Task Force
Washington Department of
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Submitted by:
ICF

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Child Care Collaborative Task Force

Amy Anderson, Association of Washington Business, Tri-Chair

Luc Jasmin, Washington Childcare Centers Association and Parkview Early Learning Center, Tri-Chair

Ryan Pricco, Child Care Aware of Washington, Tri-Chair

Erin Haick, SEIU 925

Bob McCaslin, 4th District (R), WA House of Representatives

Darlene Peters, Port Gamble S'Klallam Tribe

Tana Senn, 41st District (D), WA House of Representatives

Neil Strege, Washington Roundtable

Claire Wilson, 30th District (D), WA Senate

Liv Woodstrom, The Ounce

David Beard, School's Out Washington

Sarah Clark, Children's Alliance

Mary Curry, Pathways Enrichment Academy

Sydney Forrester, Office of the Governor

Dru Garson, Greater Grays Harbor, Inc.

Christie Glassy, Caregiver

Jennifer Jennings-Shaffer, Zero to Three

Ruth Kagi, Early Learning Ambassador

Bethany Larsen, Child Haven/Puget Sound Educational Service District

Lois Martin, Community Day Center for Children

ZamZam Mohamed, Voices of Tomorrow

Mary Ellen O'Keeffe, Thrive Washington

Jason Ramynke, Department of Children, Youth, and Families

Cheryl Smith, Department of Commerce

Nicole Sohn, Greater Spokane, Inc. Journey Discovery Center

Ginger Still, Kid's World Childcare

Faith Trimble, Capitol Campus Child Care Center

Jodi Wall, Educational Service District 112

I. Executive Summary

In support of the goals of Washington state legislation HB 1344, the Department of Commerce and the Child Care Collaborative Task Force solicited a study of child care issues in the state, including an assessment of the child care industry and workforce, economics of child care, parents' needs and preferences for care, the economic impact of child care on the state economy, and the unmet need for child care. Commerce contracted with ICF to complete this work, which has been carried out in consultation and collaboration with the Department of Children, Youth, and Families. The ICF project team also includes partnerships with Capito Associates, Fran Kipnis, and MomsRising of Washington.

It is important to keep in mind that this research was undertaken just as the COVID-19 public health crisis was beginning to take hold in Washington State, the United States, and around the world. An initial update on child care supply was also captured from June 2020, and incorporated into the summary of child care supply/demand. The sudden and wide-ranging impacts of the pandemic have had an unprecedented effect on the child care industry and the economy as a whole that is still barely understood. Inevitably, these changing conditions place these research findings in a different perspective than originally envisioned, and raise new questions that must be addressed as we begin to grapple with a new normal. However, the findings paint a baseline picture of the importance of child care as an essential support to working families in Washington and to the state economy overall, reflecting a "pre-COVID" world. Ideally, the insights gleaned from this work can help inform discussions and decisions to be made as Washington continues to grapple with the unfolding public health situation and drafts policies and plans for recovery and beyond.

Additional background and key findings are summarized below.

In This Report:

- Overview of the Economics of Child Care Markets
- Previous Research on Parents' Child Care Needs and Challenges
- Parent Voices: Parent Survey, Parent Interviews, State Employee Survey
- Supply and Demand for Child Care in Washington State
- Economic Impact of Child Care in Washington State

1. Economics of Child Care Markets

The current early care and education system in the United States places most of the burden of paying for care on individual families. Many families are left without access to affordable, high-quality early childhood programs, which both creates and perpetuates inequality (National Academies of Sciences, Engineering and Medicine, 2018).

Government support for early childhood programs was historically extremely limited with small exceptions in the wake of the Great Depression and World War II. Federal support began to increase in an on-going fashion in the 1960s, which included the establishment of Head Start in 1964. Families increasingly came to rely upon early childhood programs, particularly center-based care, with the portion of children cared for in those settings rising from 13% in 1977 to 30% in 1993 (Child Trends, 2016). Other developments since the 1990s include programmatic

investments in the funding of child care, such as the passage of the Child Care and Development Block Grant Act, the Personal Responsibility and Work Acts, and expansion of funding for the Child Care and Development Fund, Head Start, the Race to the Top-Early Learning Challenge (RTT-ELC), and Preschool Development Grants. In Washington State, receipt of a four-year Phase 1 RTT-ELC grant in 2012 allowed the state to scale up the Early Achievers quality rating program and set the stage for investments in early learning for vulnerable children through the Early Start Act.

Including these government programs, funding of the early care and education market remains fragmented, coming from a variety of revenue streams including families' private payments, public sector funds and private sources such as philanthropy and employers. The patchwork financing structure is reflected in various programs with different funding streams, constituencies, eligibility requirements and program quality standards (National Academies of Sciences Engineering and Medicine, 2018).

In response to these diverse funding streams and the different needs of families, the child care industry is diverse and has many small, independent operators. Competition among operators is typically based on the price of services to families (which is influenced by factors such as the funding source for nonprofit operators, and the scale of operations for larger private operators). Additional cost impacts include: branding/marketing expenses; location; the convenience of the operators' services; and operator reputation. However, there are various barriers to entry for new child care providers described in this report, particularly in staffing costs and level of regulation in the industry.

With minimal public investments in child care programs, providers can only charge prices that the parents in their service areas can afford and are willing to pay. Yet, the prices charged may not produce the revenues required to fully cover the costs associated with stable, high-quality care, most importantly the cost of hiring and retaining staff with the education and experience needed.

Current public investments for early childhood programs include Early Head Start and Head Start, Child Care and Development Funds funneled through state subsidy programs, state-funded prekindergarten, and tax-based subsidies. The recent report from the National Academies of Sciences Engineering and Medicine (2018) on Transforming the Financing of Early Care and Education offers several recommendations to develop an effective financing structure for a high-quality early childhood system. These recommendations may be useful for the Child Care Collaborative Task Force in developing policy recommendations for Washington State.

2. Previous Research on Parents' Child Care Needs and Challenges

A review of recent research on parents' choice in child care selection identified a complex range of factors that influence parents' decision-making. Parents' selection of child care settings may be influenced by a variety of factors, such as their access to information about the choices available, cultural factors affecting their trust in formal settings, parents' own values regarding the educational environment or other program characteristics, parents' expectations for their children's future education, parents' employment constraints such as location and hours,

availability of resources such as financial assistance. Policymakers supporting parents in their child care decisions should consider all the characteristics of families, the community, and parental preferences and constraints, not just one or two factors.

Providing more information in a system like a Quality Rating and Improvement System (QRIS) that consolidates information across program types may help parents consider all their options. Expanding the range of program choice for parents may be improved if Head Start and public preschool programs are able to expand their number of slots and expand the practical services needed by parents such as extended hours and year-round programs (Bassok et al., 2017). Publicly funded pre-kindergarten programs offer additional options for families with 4-year-olds and can lead to a substantial expansion of the available care. However, careful resource planning should anticipate system-level impacts when designing this type of large public preschool initiative, in order to protect against reducing the amount of care available for children of other ages (Bassok et al., 2016).

More research is needed that gathers information first-hand from families about how they select preschools and they constraints navigate, both those they know and those undetected barriers they do not (e.g. not having detailed safety information about the programs, or the quality of the teacher-child interactions in classrooms). Parents' definitions of quality include elements that go beyond those that are supported by research. Encouraging families to enroll their children in early childhood education programs must address more than explaining the benefits. Understanding families' expectations for their children's future can help in designing outreach programs, particularly for specific racial and ethnic groups (Ressler et al., 2019).

Measuring the availability and affordability of care in the public, private, and informal child care markets can help reveal maternal employment. Research shows that maternal employment is supported by longer school days and universal preschool (Ruppanner et al., 2019).

In order to create appropriate policy and respond to the unique needs of families in rural areas, more research about the child care requirements of families in rural areas. The research needs to be conducted into the characteristics of the resources available to support them. To increase the supply of center-based care, measures such as use of schools, employer sites, churches and public capital financing for construction and expansion could be considered. Additional supports could be developed to help home-based and family child care improve quality of care. Different methods of communication about child care, its benefits, and its availability and accessibility may be needed to reach rural families (Anderson & Mikesell, 2019).

Supporting farmworkers and migrant and seasonal farmworkers in their needs for child care offers special opportunities. There are various strategies for employers to support child care options. In addition, technical assistance to child care providers can help them meet the unique needs of farmworker families.

Addressing access to quality early education for children of color, particularly boys of color, can include solutions such as expanding the supply of child care with universal pre-kindergarten or expanded funding for child care subsidies through grants and matches. However, more targeted solutions are needed to address the barriers to access faced by families of color (Dobbins, 2016; Moran, 2019).

Preschools are a significant intervention in bringing about greater equity for children as they prepare for school (Ansari, 2017, p. 3). Cultural factors play a role: There are significant

differences in preschool use between African American, non-Latino white and Latino families. A study of Latina women found those differences in the preschool use by immigrant Latino families versus by native-born Latino families (Satkowski et al., 2016).

Immigrant families can benefit from using formal child care, although they are less likely than nonimmigrant families to use formal child care. This is especially true for Latino families. Understanding the social and internal factors that influence Latina women's preferences and decision-making can help center-based providers market their programs' accessibility and attractive features to immigrant families. Making programs reflect the preferences of immigrant families could include, for example, the hiring of Latina women (Satkowski et al., 2016).

Supporting immigrant families' access to center-based child care can be improved by creating more early childhood programs in neighborhoods with lower affluence, thereby reducing structural barriers. Programs that work to build collaborations within neighborhoods, and create neighborhood-based friendship networks, will have the best impact on supporting immigrant families' use of center-based care (Shuey & Leventhal, 2018).

Employer-provided child care grant programs can help employees with the highest need, as well as employees of higher ranks. Employees are more likely to use such programs if they are introduced to the employees in person, particularly by a colleague, and if they are universal, flexible and easy to access (Hipp et al., 2017). State early care and education lead agencies may expand the accessibility and affordability of child care by working with employers in designing such programs.

3. Parent Voices: Surveys and Interviews

Three recent sources of parents' own reports of child care needs, challenges and impacts of child care were included in this report: a statewide online parent survey; parent engagement sessions by team partner MomsRising of Washington, which worked with communities of families typically underrepresented in survey research; and the findings of the recent state employee child care survey.

Parent Survey

A statewide online parent survey was conducted with over 1,500 parents of children ages 0 (infants) through 12 years old responding; see Appendix A. The survey was conducted in mid-April 2020, shortly after the start of a statewide mandatory stay-home order. However, the survey asked respondents to reflect on experiences in the year leading up to the survey. Therefore, the findings can cautiously be considered to reflect pre-pandemic conditions. Families reported demographic information, multiple child care arrangements for each child, hours and costs paid for care, preferences and features of care needed (such as nontraditional hours of care), and challenges (including negative impacts of child care access issues on their employment and work participation).

The analysis of care arrangements examined all types of care used for each child, the number of arrangements used per child, and whether there was a primary non-parental care arrangement, as determined by the number of hours in care. Among children ages 0 through 4, the most common non-parental primary care arrangement was staying with another family member (50% of children), followed by enrolling in a licensed child care center (18%). For

children age 5 through 9, the most common non-parental primary arrangement was another family member (34%) followed by a licensed child care center (22%), and then other preschool program (16%). For older children ages 10 through 12, staying with another family member was most common (42%) followed by another type of program or activity (13%) and before- or after-school program (13%). Overall, 29% of children were not using any care other than that of a parent/step-parent or guardian, and another 31% were in only one non-parental care arrangement. Another 20% experienced two non-parental arrangements, and 20% of children were in three or more arrangements. Children age 0 through 4 were far more likely to be in no (zero) non-parental care arrangements than were older children. Older children (age 10 through 12) were more likely to be in three or more arrangements than were younger children.

Over a third of respondents (39%) reported that their family receives some kind of financial assistance paying for child care from one or more sources. The most common type of assistance received was using a “free program offered through a public school” (14%), followed by assistance from a public benefit program such as Head Start, ECEAP, Working Connections, or city-funded program (10%), or an employer flexible spending account for child care (8%). That is, families with a younger child, or both younger and older children, are more likely to receive assistance than those with only an older child. Nonwhite respondents were far more likely than white respondents to receive some form of assistance for child care costs. Respondents with mid-level incomes were least likely to be receiving some form of financial assistance, compared with those at both lower and higher levels. While this pattern does not clearly track with increase in income, it is likely due to receiving different types of assistance in different circumstances (e.g. public benefit, employer-based).

When asked about their preferences for care, while 40% of respondents preferred care in their own home, another 23% combined preferred care in a family member or friends’ home, or another person’s home. About 20% combined preferred care in a formal setting (e.g. licensed child care program, child care center, or program at a public school), and 8% had no preference.

About a quarter of respondents reported needing child care outside of regular/traditional daytime hours (6:00 am – 6:00 pm Monday thru Friday), most commonly in the evenings or weekend days.

Survey respondents also reported their challenges due to child care issues. A little less than half of respondents reported that they or their spouse/partner had to take time off due to child care issues in the past 12 months. A little more than a third reported they had reduced the number of hours or days worked due to child care issues. In addition, about 18% of respondents reported that in the past 12 months they have turned down a job offer or promotion due to child care issues.

When asked if various child care issues had an effect on their family over the last year, the three most common issues were finding affordable care (37% of respondents), finding high quality care (30%), and finding child care that fits their schedule (27%). In reporting how often their job was negatively affected by child care issues, nearly a third (32%) reported that their job is negatively affected by their child care arrangements sometimes, often or always. This figure was slightly higher (37%) for households where all parents were working.

For parents not working, child care may be a barrier to returning to employment. Nearly half (47%) of those who were jobseekers reported that child care is an issue preventing them from obtaining full-time or part-time employment.

Finally, over a third (36%) of respondents reported their household had experienced financial hardship or had made financial changes as a result of the cost of child care.

Parent Engagement Sessions

In partnership with MomsRising of Washington, a series of listening sessions were conducted with 28 families in communities often underrepresented in traditional survey research.

Researchers recruited participants that represented a wide range of diversity:

- Geography: Families living in various rural and urban locations including Outlook, Shelton, LaConner, Lake Stevens, Kent, Tacoma, Seattle, Oak Harbor, Vancouver, Issaquah, Centralia, Spokane and South King County.
- Race and Ethnicity: White or Caucasian, Hispanic or Latino/a, Black or African American, Asian or Pacific Islander, American Indian or Alaska Native
- Primary Language Spoken by Household: English, Spanish, Somali, Chinese
- Caregiver professions: Paralegal, Seasonal farm worker, family support worker, Human Resources professional, city employee, part-time worker, municipal government worker, family support worker, paramedic, social worker, ECEAP staff, store manager, unemployed, and stay-at-home parent.
- Family structure: Two-parent families, single-parent households, foster families

Parents provided important stories and detail especially about the unaffordability of care and how the exorbitant cost had impacted their choices in employment and child care. For example:

- “I’m not able to afford the child care places that would be a good fit for me, therefore I had to use one that was within my budget.” – *Parent of one school age child and one adult child*
- “I didn’t like that what I earned, I would end up with little left over. I had to leave my kids for long hours so about half my paycheck would go to the caretaker... I didn’t see the point to working at this part-time [job] anymore. I did the math and the money that was going to my commute and the caretaker was not worth it, when I could just take care of them myself and not overpay or pay the caretaker.” – *Parent of three children ages 7 to 19, Hispanic/Latino*
- “I didn’t work for 9 years because I would have been working just to pay for child care. They were in ECEAP as 4-year-olds, but it is only a half day which isn’t enough to seek employment. Now that they are both school age I work. Two kids’ care costs more than rent! ... So to me, it’s not worth it to work if you’re just paying for child care alone—it leads to a circle of poverty... If care was affordable, I definitely would have worked through my kids’ younger years.” – *Parent of two children ages 7 and 11; white/Caucasian; military family*

They also described their predominantly informal/unregulated child care arrangements, and some spoke explicitly about having inconsistent child care situations as a challenge.

- “It affects me a lot when my mom can’t take care of my children and I have to stay home from work. It affects my earnings since I am the head of the family and the breadwinner.” – *Parent of four children ages 2 to 13, Hispanic/Latino*
- “I started looking for child care when I started going to college... I looked for my family’s support. When my mom started going back to work, I had to miss class because I couldn’t leave [my child] with my mom or sister.” – *Parent of one child age 5 mo., Hispanic/Latino*
- “Since my sister watches my kids, I’m able to work full time. But I know she would want a job if she could have time to work, too.” – *Parent of three children ages 5 to 10 years, Asian/Pacific Islander*

Some families described challenges in getting subsidy, and others described their experience of not quite qualifying for support:

- “Most child care providers are working with vouchers. But people who can’t get vouchers don’t have access to ANY affordable care. If you can’t apply for a voucher, your whole salary has to go to child care.” – *Parent of color raising two children, using family, friend, or neighbor (FFN) care*
- “We can’t afford child care, and it doesn’t seem fair. Some families qualify for low-income programs and we do not. But child care still isn’t affordable for us.” – *Parent of three children, using informal relative care (not receiving subsidy)*

Many of the parents we interviewed described disruptions due to child care issues in their work schedules or attendance, and many discussed their decisions to cut back on their work or leave the employment market at least temporarily due to unmanageable child care costs.

State Employee Survey

In a related effort, this report includes key findings of the Washington State Office of Financial Management’s 2019 survey of over 6,300 state employees with children ages 0 through 12, describing their child care arrangements, needs and preferences, and challenges. Details are available in Appendix D.

Almost 60% of respondents said they found it difficult or very difficult to find and keep child care. In addition, the majority (80%) of respondents said they had missed work at least once in the last six months due to child care issues. Almost half (46%) of the employees reported missing or arriving to work late three or more days in the last six months. In addition, 77% were late at least once in the six months prior to the survey due to child care issues, and nearly half (49%) were late because of child care issues at least 3 or more days in that time period.

Employees were asked how their job had been affected due to issues accessing child care. Three-fourths (75%) of respondents have used a flexible work schedule (e.g., compressed workweek, nonstandard hours) due to issues accessing child care, and 40% have been able to telework). Less commonly, employees reported other more potentially negative impacts, including turning down a job or promotion (reported by 34%), leaving a job (17%), and reducing their work hours from full time to part time (13%).

When describing their challenges finding care, most respondents (83%) said that available care was too expensive. Other top challenges were a lack of open slots in programs near their home

or work (44% of respondents), and a lack of available care that fits their work hours (also 44%). Respondents' open-ended comments echoed these findings: 72% of comments concerned the unaffordability of child care. Some typical comments included:

- “It is very hard to find quality child care with availability, particularly for infants, and many options are prohibitively expensive.”
- “It is extremely difficult to obtain a safe, educational environment (let alone the cost) - the wait lists for all child care centers in our area are one or more years in advance.”
- “Most facilities in my area are too expensive and do not have enough space, so my options are limited.”

The three robust sources about parental reports of child care choices, needs and challenges engaged with different populations (e.g. state executive branch employees, state general population, targeted underrepresented communities), using different methods (e.g. online surveys, interviews). However, several crosscutting themes appear when considering these parent perspectives on child care accessibility.

The majority of the surveyed and interviewed parents show a strong preference for family caregivers and home-based care. State employee parents choosing non-parental care were equally likely to use a center-based arrangement as they were to choose a friend/family member or other home-based setting. Parents in all three studies reported relying on multiple care arrangements, and parents in engagement sessions spoke in particular detail about how they have put together these various arrangements in response to the need for flexible care that is affordable and accommodates non-traditional working hours. The parent interviews, combined with our partner MomsRising's perspective on the voices of vulnerable communities, reiterate the importance of trust and cultural fit for parents selecting the family environment of home care.

In all three efforts, parents reported cost and availability of care as major concerns. Parents in interviews provided testimonies of the need for family supports and publicly funded child care subsidy or programs to help them remain in the workforce. Many spoke of having left their jobs at least temporarily because the cost of child care would eat up their earnings.

Likewise, parents reported from multiple angles the negative impacts on their jobs, whether on a day-to-day basis, or for their employment choices, from experiencing disruptions to child care. In both the statewide parent survey and the state employee survey, a substantial portion of respondents reported missing days of work, being late to work, turning down a job or promotion, or feeling that child care was a barrier to returning to employment. Parents in engagement sessions likewise provided their own stories of these impacts on their work and their employment choices. In a later section of this report, the economic impact analysis leverages the statewide parent survey data on employment impacts to develop a model to measure the fiscal impact of inaccessibility of care.

4. Supply and Demand for Child Care in Washington State

This assessment included an extensive analysis of the supply and demand for child care services for children from birth through age 12, detailed in Appendices E and F. The analysis primarily focused on the supply of care in the formal, regulated child care market in Washington,

including licensed child care centers, licensed family child care homes and licensed school-age-only child care providers. The analysis also included Head Start, Early Head Start, Migrant and Seasonal Head Start, American Indian and Alaska Native Head Start and Early Childhood Education and Assistance Program (ECEAP) sites. Further, the analysis estimated the demand for and supply of informal care that is provided outside of the regulated market for child care.

4.1 Overview of Supply and Demand

Across the state, in the regulated child care market, there are 5,611 providers that have the capacity to serve 185,867 children from birth to age five. Approximately 83% of the capacity to serve these children is in child care centers and 17% is in family child care homes. For older children, DCYF data showed approximately 559 licensed school-based programs operating in the state, with an overall capacity to serve about 32,000 children from age 5 through 12.

According to recent census data, there are approximately 459,000 children in Washington from birth to age five. The number of children aged 5 through 12 is approximately 658,000. (U.S. Census Bureau, 2018). By simply dividing the capacity of licensed programs by the population they are designed and licensed to serve, child care access challenges are clear:

- Licensed child care capacity for center- and home-based child care providers is 41% of the population under the age of five.
- Licensed school-age care capacity is about 5% of the population of children aged 5 through 12.

In addition to the formal regulated market, families also use informal types of care that exist outside of the regulated market, including friends, neighbors, nannies and au pairs. The analysis estimates that there are 34,608 friend and neighbor providers who are caring for 47,277 children. Additionally, it produced an estimate of 31,248 nannies and au pairs who are caring for 42,687 children.

To examine the level of access that families with children birth to age five have to child care, the analysis used a distance-based methodology to determine the percentage of potential demand for child care that nearby providers, within a 20-minute drive time, could meet. For school age children, from the age of 5 through 12, the analysis used an area-based methodology to determine the percentage of potential demand that providers within a school district could meet. The analysis used a Child Care Industry Insights Dashboard, based in Tableau, to prepare the maps and other data visualizations that are contained in the report. The dashboard can be used and updated on an ongoing basis to inform state, regional and community-level efforts to identify access challenges and resource gaps.

4.2 Child Care Deserts

Across the state, the capacity of providers located within a 20-minute drive time can only meet 37% of the potential demand of nearby families. The level of access varies from a low of 18% in Garfield County to a high of 86% in San Juan County. In total, an estimated 118,000 families with 161,000 children birth through age five live in areas considered child care deserts. Based on the child care preferences that parents identified through the parent survey, the analysis estimates that the child care industry would need the capacity to serve 38,640 additional

children from birth to age five in child care centers and the capacity to serve 9,680 additional children in family child care homes to eliminate the child care deserts and meet the child care provider preferences of parents.

4.3 Child Care Affordability Challenges

In addition to facing access barriers that are related to capacity, families may also face barriers related to affordability, which can alter the child care decisions that they make. Examining the proportion of income that families would have to expend for various types of care can provide insights into the challenges of finding affordable care options that fit within their family budgets. When formal child care costs exceed affordability, parents may be left to consider alternative arrangements in the informal child care market. Affordability varies by the age of the child, region and type of care.

Families that have an infant and a child of preschool age in the least affordable counties could spend as much as 35% of their income for full-time care in center-based settings and as much as 29% in family child care settings. Affordability is likely a challenge for single parents earning at the median income level in all counties for all types of care. Single mothers that have an infant and a child of preschool age in the least affordable counties, for example, would have to spend more than 150% of their income for full-time care in center-based settings and more than 120% in family child care settings.

For families that have school-age children, affordability is similar across counties for center-based and for family child care for two-parent families for school-age care, where families would need to spend between 2% and 4% of their income to purchase school-age care for days that school is not in session during the school holidays and the summer. Affordability is likely a greater challenge for single parents earning at the median income level in all counties for all types of care. For those seeking center-based care and family child care for school-age children, the percent of income required to purchase care at the median market price ranges from about 6% to 15% of income across counties.

4.4 Child Care Quality Challenges

As highlighted in the literature review on child care decision-making in and further detailed in the parent and employee surveys conducted as part of this study, detailed in report chapters IV and V, parents across the nation and in Washington consider program quality an important factor in selecting a care option for their child. With this in mind, the analysis examined the extent to which families have access to programs at the highest levels of Early Achievers. The report also provides an additional analysis of access to Head Start and ECEAP, programs, which also require providers to meet higher quality standards.

Statewide, based on data from DCYF, providers at Early Achievers levels three and higher that have the capacity to serve approximately 90,000 children (41% of total capacity of regulated supply). Providers at lower levels of Early Achievers or not participating in Early Achievers have the capacity to serve approximately 127,000 children (59% of total capacity of regulated supply). The highest percentage of child care capacity at these levels of quality is 70% in San Juan and Wahkiakum counties. All counties had at least 25% of capacity at this level of quality, except for

Island (21%), Columbia (13%) and Skamania (9%). There were no providers at this level of quality in Ferry, Garfield and Lincoln counties.

The analysis also examined the proximity of families to providers that are at higher levels of quality. Within a 10-minute drive, 70% of families can access at least one provider at Early Achievers levels four and five. When extended to a 20-minute drive time, the percent of families that can access at least one provider at these quality levels increases to 93%.

4.5 Impact of Pandemic Disruption on Supply and Demand

When reviewing the findings in this report, one must recognize that the snapshot data of the child care supply, and the assumptions about the demand for services pre-date the full impacts of the COVID-19 pandemic in Washington. This unprecedented event has, and will continue to have, significant impacts on both the supply and demand for child care. As parents are furloughed, laid off, or otherwise ceasing work due to the COVID-19 pandemic, an analysis by the Minneapolis Federal Reserve found that overall demand for child care services has dropped by 25% to 40% compared to pre-pandemic levels (Grunewald, 2020). In Washington, the supply of licensed child care dropped by 27% between February and June of 2020. This does not account for additional reductions in capacity due to lower group sizes, or closures of Head Start or ECEAP programs.

An already challenging situation for child care providers worsened due the pandemic, even though their services are typically in high demand. Child care businesses generally have a slim profit margin, and owners or directors rarely have formal education in business practices. The Minneapolis Federal Reserve found that child care providers do not often work with traditional lenders, and consequently have limited access to cash reserves or credit lines. As a result, many child care businesses are unable to withstand a sharp decline in revenue. Additionally, providers also face significant cost increases that stem from implementing and maintaining the smaller child-to-staff ratios necessary to limit potential virus exposure for children and staff members. Providers now must also clean and sanitize more frequently. Following potential exposure to the virus by staff or children, providers may also need to close for days to disinfect. What was already a challenging business model is more difficult to manage with these added costs (Grunewald, 2020).

While there has been a significant decrease in demand for child care services overall, there has been an increase in the demand for child care for essential workers. Across Washington, there are an estimated 236,000 of these essential, frontline workers, including nurses, physicians, other medical professionals, firefighters, police officers, pharmacists, and laboratory technicians. An estimated 50,000 (21%) of essential workers need child care (Federal Reserve Bank of Atlanta, 2020).

4.6 Child Care Workforce

The skills, knowledge, and well-being of early educators are inextricably linked to the quality of children's early learning and development. The Child Care Workforce Compensation Policy Analyses, which is part of the series of reports produced as a companion to the Child Care Industry Assessment, included an extensive analysis of data from the MERIT data system,

Washington's early childhood workforce registry. The analysis was based on a review of records for approximately 36,000 early childhood educators, as detailed in Appendix I, and examined demographic characteristics of the workforce, including job titles, race and ethnicity, languages spoken, age, educational attainment and certificate attainment. The analysis also examined variations in these characteristics by geographic regions, including Child Care Aware Region, county and zip code.

Key highlights from the analysis include:

- Compared to other language groups, a much larger percentage of English/Somali and Spanish speakers (almost all), and a larger percentage of English/Spanish speakers (61 percent) have attained less than an associate degree.
- Compared to other racial/ethnic groups, a greater percentage of Hispanic/Latinos (64 percent) and Black/African Americans (63%) have attained less than an associate degree.
- Compared to other job categories, a larger percentage of family home assistant/aides (63 percent) and family home teachers/owners (77 percent) have attained less than an associate degree.
- Compared to other regions of the state, the Central Washington Region has the greatest percentage (68 percent) of educators who have attained less than an associate degree.
- When compared to other regions of the state, the Central Washington Region also has the greatest percentage of Hispanic/Latino educators (60 percent) and educators who speak English/Spanish or Spanish only.
- The workforce is generally representative of the population of children in the surrounding community in which early educators work, but each racial and ethnic category is underrepresented in at least some counties and zip codes, with those identifying as "Pacific Islander or other race" the most likely to be underrepresented.
- The portion of the workforce that has attained a bachelor's degree or higher tends to increase as the income in the surrounding zip code increases. Likewise, the portion of the workforce that has attained less than an associate degree is much higher in zip codes with lower incomes than those with higher incomes. This presents possible inequities, given the important link between quality and educational attainment.

5. Economic Impact of Child Care in Washington State

Economic impact of limited access to child care was assessed using a complex model taking into account multiple factors affecting parents' ability to work their labor force participation and lost time at work. Inaccessibility, or lack of access to child care, has a direct effect on reduced wages due to lost time at work and remaining out of the workforce. Additional impacts include reduced productivity from both lost time at work and greater employee turnover, and - in the case of state budgets - reduced tax revenue due to those lost wages and productivity declines.

Examining impact by employment sector, this effect is estimated to have the greatest impact on a few sectors:

- State and local government sector
- Health care and social assistance

- Administrative and support services
- Accommodation and food services
- Professional services, and
- Retail trade

Inaccessibility of child care leads to lower rates of labor force participation, as household members decide to not work, or work less, due to child care issues. The reduced labor force participation represents roughly 53% of the total economic impact, while lost time at work represents 32%, and employee turnover represents 15% of the total economic impact. The foregone earnings have a greater impact on families and the state than the cost of employee turnover and lost time at work.

The total amount of tax revenue not realized by Washington State due to the economic impacts of child care inaccessibility, ranges from roughly **\$1.2 billion in 2019 to \$935 million in 2028, and an annual average of \$1.03 billion**, largely due to impact on revenue reducing the business and occupation tax.

This information was gathered as the impact of the COVID-19 pandemic was beginning to cause a shutdown of workplaces, public gathering places, schools and child care facilities. The long-term impact of these changes, both for availability of care and for parents' employment prospects, is not yet known. Future analysis will need to understand not only the new normal in child care supply, but parents' own comfort level and ability to find care that supports their employment and family's needs.

II. Overview/About This Report

In support of the goals of Washington state legislation HB 1344, the Department of Commerce and the Child Care Collaborative Task Force solicited a study of child care issues in the state, including an assessment of the child care industry and workforce, economics of child care, parents' needs and preferences for care, the economic impact of child care on the state economy, and the unmet need for child care. Commerce contracted with ICF to complete this work, which has been carried out in consultation and collaboration with the Department of Children, Youth and Families. The ICF project team also includes partnerships with Capito Associates, Fran Kipnis, and MomsRising of Washington.

To address the Task Force's research needs, this report includes data and analysis from a variety of sources and perspectives on Washington's child care industry and its value or impact on the state economy.

- A **literature review of previous findings** on child care highlights the most recent national research on what is known about parents' needs, preferences and selection process for child care arrangements.
- A description of the **supply and demand for child care**, and a **geospatial analysis** of the drive-time distance as it relates to availability of care for working families in Washington, provides an illustration of the child care industry, particularly availability of high-quality care, inequities in access to care and the extent to which child care "deserts" result in critically underserved communities.
- The chapter highlighting **parent voices** summarizes three approaches to understanding Washington families' needs and preferences for care, from their own perspectives.
 - The online **parent survey** provides a quantitative analysis of needs and preferences for care, current arrangements, unmet needs or challenges accessing care, and career/economic impacts of limited or unreliable access to care.
 - The **parent engagement sessions** provide insights through rich stories gleaned from personal interviews with families often under-represented in traditional survey research.
 - The **state employee survey** provides key findings of results from a survey reflecting the child care needs and choices, and the impact of child care challenges, on the state government workforce: working parents employed in Washington state executive branch agencies.
- The **economic impact analysis** measures and projects the economic and fiscal impacts of limited access to child care in Washington state over a ten year period (2019-2028). The analysis relies on both public data and selected results from the online parent survey data carried out in this research effort, to estimate parents' own lost income as well as employers' lost productivity and additional costs due to the lack of adequate child care solutions over these years. These effects are then modeled to understand the economic impacts of these effects in terms of employment, earnings, gross domestic product (GDP), output, and state tax revenue. Note that due to timing of this research effort, the current analysis could only incorporate limited updated assumptions reflecting economic projections after the COVID-19 pandemic. Recovery and lasting effects of

child care access, employment and the state economy as a result of the pandemic are not yet fully known.

- Finally, the **conclusion** section draws together key takeaways from these multiple sources of information and highlights important considerations for the Child Care Collaborative Task Force's use in its report to the legislature.

In addition, as part of this overall effort to assess key questions for the Child Care Collaborative Task Force, separate efforts are underway for additional analyses in the following areas:

- Child care providers' costs of providing care in the state
- Policies and supports for parity and equity in child care workforce compensation, as required by Washington state legislation E2HSB 1391
- Policies and recommendations for state-supported child care programs including the Early Childhood Education Assistance Program (ECEAP), Washington's public pre-kindergarten program for vulnerable/high-risk children, and Working Connections, Washington's child care subsidy program for low-income working families (also per E2SHB 1391).

These efforts are reported in companion reports slated for June 2020.

A note for readers: This research was undertaken just as the COVID-19 public health crisis was beginning to take hold in Washington State, the U.S. and around the world. The sudden and wide-ranging impacts of the pandemic have had an unprecedented effect - on the child care industry and the economy as a whole - that is still barely understood. Inevitably, these changing conditions place these research findings in a different perspective than originally envisioned, and raise new questions that must be addressed as we begin to grapple with a new normal. However, the findings paint a baseline picture of the importance of child care as an essential support to working families in Washington and to the state economy overall, reflecting a "pre-COVID" world. Ideally, the insights gleaned from this work can help inform discussions and decisions to be made as Washington continues to grapple with the unfolding public health situation and drafts policies and plans for recovery and beyond.

III. Overview of the Economics of Child Care Markets

Despite earlier public investments in early care and education, the current financing structure only allows it to serve a fraction of the families who need high-quality care, and hampers the development of a stable, highly qualified, and high-quality workforce, making the financing structure neither sustainable nor adequate to provide the quality of care and learning children and families need. The consequences of this long-standing approach to financing have left many families without access to affordable, high-quality early childhood programs, thereby perpetuating and driving inequality (National Academies of Sciences Engineering and Medicine, 2018). This section provides an overview of the economics of child care. It describes the evolution of child care markets and policy in the United States, describes the role of competition in the market, highlights costs and barriers for new providers to enter the industry, highlights the primary public investments into child care in Washington and describes proposed policy interventions to improve the quality, access and affordability of child care.

1. Evolution of Child Care Industry in United States

The government's historical relationship to child care arose during an era in which relatively few children received care outside the home and family. For much of the twentieth century, the provision of child care outside of the home remained the exception rather than the rule, and nonintervention norms were consistent with this reality (Clarke-Stewart et al., 2005). State intervention in and support for child care tended to be modest and typically came about in response to perceptions that either particular families, or the country more broadly, were in crisis. In response to these crises, public support ebbed and flowed rather than rising steadily (Cohen, 1996). Up until the 1930s, the federal government had largely stayed out of funding early childhood programs, but two national emergencies spurred the federal government to begin funding them: the Great Depression and World War II.

The 1960s brought early childhood programs into the spotlight as result of multiple trends, including emerging research that focused on the importance of early childhood development and a continued increase in the number of women in the workforce. This research and the War on Poverty resulted in the establishment of Head Start in 1964 (National Academies of Sciences, Engineering and Medicine, 2018). Families increasingly came to rely upon early childhood programs, particularly center-based care, with the portion of children cared for in those settings increasing from 13% in 1977 to 30% in 1993 (Child Trends, 2016). In 1990 Congress passed the Child Care and Development Block Grant Act, which marked the first time that the federal government provided funding for child care for low-income families who had never been on welfare (Lombardi, 2003). In 1996, Congress also passed the Personal Responsibility and Work Opportunity Act, which significantly increased funding for child care assistance for low-income families. The past decade has seen additional investments into early childhood programs, including expansion of funding for the Child Care and Development Fund, Head Start, Race to the Top – Early Learning Challenge (RTT-ELC) and Preschool Development Grants. Washington was a recipient of a four-year Phase 1 RTT-ELC grant in 2012, which allowed the state to take Early Achievers to scale, and set the stage for significant state investments in quality early learning for the most vulnerable children through the Early Start Act.

Early childhood programs have served multiple purposes in the United States, including to promote child development, support parental employment and to invest in the future workforce. Each purpose has been reflected in the evolution of early childhood policy over the past century and has been prioritized differently in various policies over time. Furthermore, funding for early childhood services comes from a multitude of revenue streams, including families' payments, public sector expenditures, and other private sources such as philanthropy and employers. As a result, the financing for early care and education in the United States is fragmented and a patchwork of separate programs, with different funding streams, constituencies, eligibility requirements, and quality standards (National Academies of Sciences Engineering and Medicine, 2018).

2. Role of Competition in Child Care Industry

The child care industry has a relatively low level of market share concentration and is largely characterized by large numbers of small, independent organizations. However, increasing mergers and acquisitions among larger companies has led to a shift toward larger establishments. An industry report from IBISWorld identifies critical success factors for organizations in the child care industry (IBISWorld, 2019). The success factors include:

- Ability to take advantage of government subsidies and grants
- Ability to vary services to suit different parent needs
- Ability to alter business model and staffing to respond to enrollment changes
- Accreditations from authoritative sources
- Ability to comply with government regulations

Larger center-based child care providers in the regulated market differentiate themselves based on qualifications of staff, education programs, staff-to-child ratios, the level and quality of facilities, and aesthetic surroundings. Competition in the industry is high and the basis of competition is typically focused in four areas. Price of service is one of the main competitive factors. Nonprofit child care centers may have low or no rental costs and may receive donations or in-kind services to cover operating expenses. These lower costs may be passed on as lower prices to families. Larger for-profit child care centers may compete on price by using economies of scale. The standardization of service and numerous locations can enable a large child care provider to lower prices for families. Child care providers may also compete through branding and marketing to attract enrollment and to advertise their ability to adapt to a family's work schedules. They may also compete based on location and convenience for parents commuting back and forth to work. Finally, the reputation of the child care provider is another basis of competition (IBISWorld, 2019).

3. Costs and Barriers to Entry for Child Care Providers

Barriers to entry in the child care industry differ based on the type of child care providers in the industry. Providers operating outside of the regulated market (friend, family, or neighbor providers, nannies and au pairs) face fewer barriers to entry, given that there are no significant costs or government regulations that would deter a would-be caretaker. However, for friend, family and neighbor providers who are serving children through Working Connections, there are

state requirements related to background checks, attendance and other requirements mandated by CCDF.

For larger child care providers operating in the regulated market, such as child care centers, there are medium barriers to entry. Labor is a potential barrier to entry, especially for child care centers, as they are mandated to maintain a specific child-to-staff ratio and group size. Staff costs are the largest expense for child care centers and a large portion of a new entrant's expenses. Therefore, these costs may deter new center-based child care providers from entering the industry. Another significant barrier for new entrants is the level of regulation in the child care industry. Newly established firms in the regulated market, whether a family child care provider or a child care center, must be approved by the state and staff must meet specific credential requirements and pass a background check. Finally, the cost of purchasing or building a center for accommodation, together with the cost of facilities and equipment, can be prohibitive to a new entrant. However, child care centers may be able to mitigate these costs if they are able to lease a space (IBISWorld, 2019). The Early Learning Facilities Fund provides state-funded grants and loans to assist child care providers in meeting the challenge of facility finance.

4. Overview of Public Investments for Child Care

The essential argument for public action and investment in early childhood programs asserts that stable, high-quality care produces both private benefits to participating children and their families and benefits to other members of society, as taxpayers and as private citizens (Council of Economic Advisors, 2014). As a result of improved education outcomes, children who experience high-quality early childhood programs gain from higher lifetime earnings. Parents benefit directly from early childhood subsidies, and because of the options available to them, they may also be able to work more or increase their professional education or training, resulting in increased earnings over time as job experience rises and they augment their own human capital. Finally, other members of society as taxpayers realize lower public-sector costs and higher tax revenue from the improved life outcomes of children enrolled in high-quality programs (e.g., education system savings from reduced use of special education, criminal justice system savings from lower crime, and increased taxes paid on higher lifetime earnings). They also gain as private citizens from reductions in crime and crime victimization, beyond the savings to the public sector (National Academies of Sciences, Engineering and Medicine, 2018).

The benefits to taxpayers and private citizens are positive spillovers (called externalities by economists) that families do not take into account when making their decisions about how much high-quality early childhood services to consume. In the classic economic framework, this leads to an underinvestment in early childhood programs (relative to the investment that would produce the greatest net benefit for the economy) if families must pay the full cost, especially for lower-income families who cannot afford to pay the cost of high-quality early childhood programs and who cannot borrow against the private gains they and their children would experience in the future (National Academies of Sciences, Engineering and Medicine, 2018). As a result, providers are only able to charge prices that the parents in their area are able and willing to pay for child care. The prices charged may not produce the revenues required to fully

cover the costs associated with stable, high-quality care, most importantly the cost of hiring and retaining staff with the education and experience needed.

The primary public investments for early childhood programs include multiple programs that subsidize the cost of providing care:

- **Early Head Start and Head Start** – Serves children from birth to age five in families with incomes at or below the federal poverty level. Funds go directly to providers.
- **Child Care and Development Fund** – Serves qualifying low-income families with children from birth to age 12. Funds go to states, which fund providers through vouchers or contracts.
- **State-Funded Prekindergarten** – May be targeted or universal for children ages three to five. Funds distributed through vouchers, scholarships, contracts, grants or school funding formulas

Additional public investments in the form of tax-based subsidies include:

- **Child and Dependent Care Tax Credit** – Available to working families with tax liability and children from birth to age 12. Funded through personal income tax credit.
- **Dependent Care Assistance Program** – Available to working families with tax liability and children from birth to age 12. Funded through employer-administered account to pay for eligible expenses with pretax dollars.
- **Employer-Provided Child Care Credit** – Available to working families with qualifying employer and with children from birth to age 12. Funded through an employer tax credit.

The final chapter in *Transforming the Financing of Early Care and Education* (National Academies of Sciences, Engineering and Medicine, 2018) offers a number of recommendations to develop an effective financing structure for a high-quality early childhood system for all children from birth to kindergarten entry. Several central concepts underlying these recommendations have the potential to transform the current state and provide affordable access to high-quality early childhood options for all children and families. These recommendations may be useful to consider, as the Child Care Collaborative Task Force develops policy recommendations for Washington State.

IV. Review of Research on Parent Choices in Child Care Decision-Making

This review recaps a previous summary of research on parents' child care decision-making (Forry et al., 2013) and updates that review with the most recent research completed since then. Such a literature review can be helpful in informing the development of policy and operational plans, as well as informing the collection of information from parents who will be impacted by that policy and operational procedures. Note: The methodology of the studies reviewed and the sources of data are not routinely included in the summary that follows. If the findings are of interest, the readers are encouraged to review the source study for additional information on the limitations of the studies, the data used, and the procedure for analyzing and interpreting the data.

1. Looking Back: Previous Research

In 2013, a "Child Care Decision-Making Literature Review," was funded by the Office of Planning, Research and Evaluation as part of the Child Care and Early Education Policy and Research Analysis and Technical Expertise Project. The review was designed to provide expert consultation, assessment, and analysis of the policy and research completed throughout the United States on this topic (Forry et al., 2013). The focus was on the child care decisions of parents of young children (ages 0–5). To frame the review, a child care decision-making model developed by Weber (2011) was used. Discussions with state administrators identified the relevant issues (Forry et al., 2013). The key findings described in this section, reproduced below from Forry et al. (2013, pp.5–7), provide foundational information for the sections that follow in this literature review.

1.1 Parents' Child Care Decision-Making Process

- Most low-income parents perceive having limited child care options and consider few options.
- No negative associations have been found between the amount of time spent searching for care or number of options considered and parental satisfaction with care.
- Most low-income parents learn about their child's provider from friends, family members, and neighbors.
- On average, low-income parents make child care decisions quickly; 41% of parents from one study made choices within one day.

1.2 Parents' Preferences and Priorities in Selecting Care

- When asked for their child care preferences, the majority of low-income parents place a high value on the quality of arrangements. These preferences are not always reflected in parents' choices when selecting a child care arrangement.
- Parents' definitions of quality vary across studies, but tend to include both structural and process-oriented features identified by early care and education professionals as being

indicators of quality. Structural features included in parents' definitions of child care quality include provider education, provider experience and training, and a low child-adult ratio. Process-oriented features included in parents' definitions of child care quality include provider warmth, activities to support children's development (including cognitive/academic skills and social skills, and open communication within the family-provider relationship). In addition to these specific factors, parents placed a strong emphasis on their children's health and safety and their trust of the provider.

- Child care preferences differ by a number of child, parent, family, and community characteristics. For example, whereas parents of infants and toddlers tend to prefer parental/relative care, parents of preschoolers tend to prefer center-based care. Studies have found that parents with less than a college degree place more emphasis on safety and practical features, such as cost and location, while parents with a college degree are more likely to focus on quality features. Studies have also found parents who are working, and particularly those working full-time, are more likely to cite practical considerations such as cost and location than parents who are not working or who are working part-time. Likewise, family income has been positively associated with parents' endorsement of quality as compared to practical features as top priorities.
- Child care preferences and choices among immigrants vary by country of origin and reflect experiences from their country of origin and values of their culture.
- In addition to having many of the same preferences and concerns of other parents, parents of children with special needs are also concerned about specific program features that are critical to the care of their child's special needs. Availability of care that meets children's special needs is limited. Limited availability of child care options that can meet children's special needs have resulted in a high use of care from family members, friends, and neighbors as well as employment disruptions for parents.

1.3 Constraints to Selecting Preferred Care Arrangements

- Contextual factors related to the child care market include the availability, quality, accessibility, affordability, and parental awareness of supply.
- Child care options for infants and school-age children tend to be more limited than options for preschool-age children.
- Rural areas tend to have fewer regulated child care providers than metropolitan areas, and more unmet child care needs have been documented in low-income communities than higher income communities.
- Employment factors (for example shifting and unpredictable work schedules, nonstandard hours, and inflexible work policies) limit families' child care options.
- Among families reliant on public transportation, accessibility to care options is limited by the schedule and routes of public transit.
- Families' child care choices reflect the options they perceive to be affordable.
- Parents, particularly immigrants or refugees, may have limited awareness of their eligibility for free/subsidized early care and education arrangements, such as Head Start.

1.4 Facilitators to Selecting Preferred Care Arrangements

- The majority of low-income parents know about resources and referral services, but did not

use this service to find their child's care.

- Most parents have reported that they would be interested in the type of information that Quality Rating and Improvement Systems provide, and would use this information in making child care choices.
- Most parents are not aware of state/local Quality Rating and Improvement Systems, though the percentage of parents who are aware of these systems is growing.
- The use of child care subsidies has been associated with parents using their preferred type of care. Scholarships, designed to facilitate parents' access to high quality care, have been associated with changes from unlicensed to regulated (primarily center-based) care.

2. Highlights from Studies Since 2013

Our review of more recent studies frequently corroborated the findings from the earlier studies. While many of the findings in the latest studies are similar to or the same as those of the earlier studies, some nuances exist that may be helpful in understanding how to tailor policy responses to particular populations.

2.1 Parents' Child Care Decision-Making Process

Program type made a difference in the search process as found in a study of low income parents of 4-year-old children enrolled in publicly-funded programs. In general, personal networks (family/friends, 39%) and local public schools (44%) were the primary sources of information in parents' search for an early childhood education program. Few used advertisement (6%) or referral agencies (11%) (Bassok et al., 2017, p. 49). This result may be affected by the study being limited to low-income families searching for care for 4-year-old children in Head Start, state-funded preschool, or subsidized private child care Bassok et al., 2017, p. 43). Head Start parents used personal networks (67%) more often than parents using child care centers (42%) or parents using state preschools (26%) (Bassok et al., 2017, p. 49-50). Parents with children in child care centers used a more varied set of sources in their search than Head Start or preschool parents and did more comparison shopping. Parents with children in child care centers had a more difficult search process and were not as likely to be able to enroll their child in their first choice of program (Bassok et al., 2017, p. 50).

Child care factors are associated with maternal employment: Specifically, the likelihood of **maternal employment** is affected by factors such as cost of child care and the length of the school day.

- In states where child care is relatively inexpensive and the school days are longer, mothers are more likely to seek employment.
- There is a correlation between length of school day and cost of child care (e.g., states with longer school days also have less expensive child care).
- The cost of child care has the greatest impact on employment for single mothers with lower skill levels, lower income, and preschool-aged children (Ruppanner et al., 2019).

A combination of **human capital considerations** (e.g., parental resources and especially mothers' educational attainment, perception of their children's potential, and their expectations

for their children’s educational attainment) increases the chances that children will be enrolled in early childhood programs. The interaction of these elements of human capital has a greater impact for **racial/ethnic minority** families, particularly for Mexican-origin families, by increasing the chances that their children will be enrolled in early childhood education programs.

- Overall, Mexican-origin children are 20% less likely to be enrolled in an early education program than Black/African American or white children (Ressler et al., 2020, p. 6).
- Maternal education levels seem to be more related to white and Mexican-origin families choosing to enroll their children in early education program than African American families (Ressler et al., 2020, p. 9)
- Among a sample of families that did not expect their children to graduate college there were differences between children’s pre-academic skill levels and enrollment for parents of various race and ethnicities:
 - Children from African American families were more likely to be enrolled in early childhood education programs if they had more developed pre-academic skills
 - Children from white families were more likely to be enrolled in early childhood education programs if they had less developed pre-academic skills
 - There was little connection between enrollment and children’s pre-academic skills for Mexican-origin families (Ressler et al., 2020, p. 8).

For a small-sized sample of **African American caregivers** in low-income urban settings, one study showed that caregivers used trusted sources to locate child care and then visited to assess the setting themselves. They did not use the state’s Quality Rating and Improvement System (QRIS) rating, or if they did, considered it secondary to their assessment (Moran, 2019).

2.2 Parents’ Preferences and Priorities in Selecting Care

Type of care chosen is affected by some combination of the characteristics of families and communities rather than one factor: parent’s age, education, and income; household structure; ethnicity; child with special needs; age of youngest child; number of children under the age of 13; social support; supply of care; unemployment rate in county; nonmetropolitan area; parent priorities for care (e.g., trust, health and safety, convenient location, flexible hours, shared values, supports learning); and parent constraints (e.g., employment, hours employed, access to a car, use of financial assistance) (Weber et al., 2018).

- Center care was more likely to be chosen by parents with greater than a high school education who are non-white, and who report that learning is a primary reason for selecting a provider. The second reason parents mentioned in selecting a center was convenience (e.g., the center is dependable or provides transportation). Parents with employment constraints, who live in a county with high unemployment, or have trust as their primary reason for selecting a provider were 22% less likely to use center care (Weber et al., 2018, p. 534).
- Relative care was chosen more often by parents with more children under age 13, who had greater social support, and who prioritized trust or needed a flexible schedule. Relative care was not chosen by parents with higher incomes, parents who received subsidies, or those who wanted a provider who supported learning (Weber, et al., 2018, p. 535-536).

- Family child care was chosen by older parents, parents with higher income, parents who lived in a county with higher unemployment, and by parents who reported that trust, convenient location, flexible hours, and cost were important. Parents with a subsidy were 20% more likely to choose family child care than parents without a subsidy. Concerns about quality of care were frequently mentioned by parents using family child care. Family child care was less likely to be used by parents with a child with special needs, whose youngest child is older or who have more children under age 13 (Weber et al., 2018, p. 536).
- Informal care was chosen when parents had one or more employment constraints and trust and flexible hours were the primary reasons for selecting care. Access to a car reduced the likelihood of using informal care (Weber et al., 2018, p. 536-537).

Race and ethnicity made a difference in the type of care arrangement. For children age birth to four years, the following key facts were found (Child Trends, 2016).

- Parental care – African American children are least likely to be in parental care (17%) and Hispanic children most likely (29%).
- Center-based care – African American children are most likely to be in this care (31%) and Hispanic children least likely (14%).
- In home care – when in-home care is used, African American (35%) and Hispanic (36%) children are more likely to be cared for by a relative in the home, while white (24%) and Asian (25%) children are more likely to be cared for in the home by a nonrelative.

For **children enrolled in preschool and kindergarten programs**, the following key trends were recently noted (Child Trends Databank, 2019):

- The percentage of 3- to 5-year old children who are enrolled in full-day prekindergarten and preschool programs increased from 21% in 1994 to 30% in 2017.
- Non-Hispanic African American children are more likely to be enrolled in a full-day preschool (42%) than non-Hispanic white (29%) or Hispanic children (23%).
- Non-Hispanic white children are more likely to be enrolled in a part-day program (27%) than Hispanic (23%) or non-Hispanic African American children (14%).
- Children from families with higher levels of parental education are more likely to be enrolled in a preschool program (34% of children with parents with a bachelor's degree; 18% of children with parents with less than a high school degree).

Personal assessment of the child care environment was shown to be important for **African American caregivers** in low-income urban settings, in one study. Caregivers said they chose programs based on the child care environment (e.g., safety, center staff's warmth, receptivity, and teachers' background) and how children spend their time in care. Some valued teachers' education and degrees more, and others valued experience more. The caregivers were concerned that children spend their time in learning and education activities, although their descriptions of those were subjective. The study participants tended to look at any activities as positive, particularly school-like activities, since they had past experiences where the children watched TV or "did nothing" all day (Moran, 2019, p. 1, 8, 11).

Program features also guided preferences of low-income parents in a Louisiana study with 4-year-old children enrolled in Head Start, state-funded preschool, or subsidized private child care. These parents indicated that program features related to the care environment and learning opportunities such as academic skills (88%), a clean/safe environment (87%), and warm teachers (81%) were more important than practical features of care such as affordability (48%), transportation (32%), location (58%) or hours of operation (41%) (Bassok et al., 2017, p. 48-49).

Immigrant parents also affects parent preferences and choices. More than half of the foreign-born immigrants living in the United States (40 million, 12.9% of the total U.S. population) were born in Latin America (Grieco et al., 2012, p. 2). By 2020, nearly 30% of all children in the United States will have one foreign-born parent (Satkowski et al., 2016, p. 2). In a study of **Latina women**, some of whom were immigrants (i.e., born outside the United States) and some of whom were nonimmigrants, social and internal factors such as acculturation and trust were significant in the child care decision-making process. This study did not look at external factors in decision-making (e.g., English proficiency, availability, transportation, and affordability). It sought to answer the question of whether immigrant parents and social and internal factors influence child care preference and arrangements of Latina women, and whether those social and internal factors influence Latina women differently by immigrant/nonimmigrant. The study found significant differences between Latina immigrant and nonimmigrant women in the factors influencing preference and arrangements.

- Both groups of Latina immigrant and nonimmigrant women rated trust in caregivers as highly important.
- Both immigrant and nonimmigrant Latina women prefer relative child care and acculturation is not a factor in choosing that type of care.
- They differed in that immigrant participants thought that relative child care was significantly lower in quality than nonimmigrants did.
- Predictors of the use of center-based care were nonimmigrant parent, education level of parent, having older children, perceptions of quality, higher levels of social support, higher levels of acculturation, and fewer perceived costs of maternal employment for children (Satkowski et al., 2016).

A combination of issues creating inequity for **Latino families** (e.g., socioeconomic factors, parents limited English fluency, and difficulty in finding preschool options that meet their needs), rather than just cultural differences, create the barriers to placing their children in preschool. Families' choices are made within the context of their needs, resources, opportunities, and constraints.

- Having more need and more resources were factors in choosing between parental care and preschool.
- When choosing between preschool and informal care, the characteristics of the parents' community and the parents' beliefs and expectations were key to decision making.
- U.S.-born Latino families view preschool as a means of preparing children academically, while immigrant Latino families see preschool as a compensatory measure.

- Immigrant Latino families in communities with use of both Spanish and English are likely to select a preschool rather than another type of care.
- U.S.-born Latino families are less likely to enroll their children in preschool and instead use informal arrangements, perhaps to hold on to their ancestry and cultural values (Ansari, 2017).

Caregivers of children with and without disabilities placed the highest priority on teacher-child interactions in choosing a program for their children; their second-highest priority was safety. Experts are in agreement on the value of both of these characteristics. Caregivers also considered practical features such as cost, location, program hours, and transportation. Caregivers of children with disabilities placed a priority on structural features that would support their children, such as accessible facility space or access to special therapists (Glenn-Applegate et al., 2016).

2.3 Constraints to Selecting Preferred Care Arrangements

Limitation in information is a constraint for caregivers (families) of children with and without disabilities in choosing child care. Caregivers value safety, but may not know that the licensing standards and oversight of the program may not be adequate. They agree with experts that positive teacher-child interactions are vital, but they may lack the time and tools to assess those interactions. The factors caregivers of children with disabilities used in selecting a quality program did not predict the actual quality of the program (Glenn-Applegate et al., 2016).

Rural areas of the United States account for 72% of the landmass with a low density of population, representing 14% of the total population (Anderson & Mikesell, 2019, p. 1812). These areas have, more constrained labor markets and distinct cultural differences. Twelve million children live in these areas. Many of those children live in **rural communities that cannot provide the opportunities that prepare them for school** (Anderson & Mikesell, 2019). Most rural families choose home-based or family child care providers, but not enough is known about whether those choices are driven by the constraints on options (Anderson & Mikesell, 2019).

More than half of the 1.8–2.5 million **migrant and seasonal farmworkers** in the United States have minor children. More farmworkers are traveling with their families and more of the farmworkers are women. With agricultural operations creating sizeable risks, off-farm child care is critical to safeguarding children while their parents work (Liebman et al., 2017). In a survey of 132 farmworker parents, most of them (97.5%) reported that someone cares for their children while they work, and they pay for that service. The majority of that care is informal and unlicensed. Those parents have difficulty in getting child care because of eligibility criteria, documentation required, lack of slots, language barriers to completing the application, and lack of internet access to apply. They report that the availability of child care determines which work locations they choose (Liebman et al., 2017).

Families of color are less likely to access quality early childhood education, primarily for financial, cultural, and geographic reasons. Lack of access is further complicated by programs not being able to accommodate parents' irregular or nontraditional work schedules and the often

complicated requirements to receive public child care funding. Boys of color are especially likely to experience unequal access to early education programs, however, as one study points out, the size of this problem is not known since federal data sets do not uniformly include information on race and ethnicity and much of the research on unequal access to high-quality early childhood education for children of color does not break down the data by gender (Dobbins, 2016, p. 9). Another study of African American caregivers in low-income urban settings showed that they faced similar barriers to access, e.g., availability of care within their neighborhood, particularly quality care, and the affordability of that care (Moran, 2019).

For **parents of young children working in the service sector** and subject to on-call work or last-minute shift changes, it is common for them to use multiple care arrangements, rely on informal care arrangements, rely on children to care for themselves, or rely on their older children to take care of their younger siblings (Harknett et al., 2019).

2.4 Facilitators to Selecting Preferred Care Arrangements

While other aspects of the child care decision-making process has received more attention in the research during the past few years, there is little new research on the facilitators for selecting preferred care arrangements.

- **Being part of a network** connected to a specific type of program supports the selection of a formal early childhood education program. For example, Head Start parents got their information about these programs from family/friends. Parents of children in public preschools got their information from the local public schools. Parents of children in child care used a diverse set of sources to find a program for their four-year-old child (Bassok, et al., 2017, p. 49-50)

Neighborhoods' structural and social process features are a key context in families making a choice to use center-based child care. One study examined this association, as well as the influence of immigrant status on that choice. In neighborhoods of concentrated affluence (higher incomes, well-educated professionals) which improved the quality of resources available, there was a higher use of center-based care. In neighborhoods of child-centered collective efficacy (more social cohesion and control, common beliefs around childrearing), there was a lower use of center-based care, perhaps because there was more trust that neighbors shared the same childrearing beliefs and could be trusted. It was hypothesized but not tested by this study, that this type of neighborhood may support more use of informal child care. The use of center-based care depends on the size of the neighborhood friend/kin network and the age of the child for immigrant families.

- Specifically, the greater the size of the network and age of the child, the more likely immigrant families were to use center-based care. (Shuey & Leventhal, 2018).
- **Flexible child care assistance** provided by employers increases the ability of employees to access the child care of their choice (Hipp et al., 2017).

3. Implications for Policy and Practice

Policy-makers supporting parents in their child care decisions should **consider all the characteristics of families, the community, and parental preferences and constraints**, not just one or two factors.

- Addressing employment constraints may improve the chances of parents choosing care that supports their child's developmental needs.
- The selection of center care in particular may be increased by addressing the role of trust in parents' decisions.
- Access to financial supports helps parents choose more formal care (Weber et al., 2018).

Providing **more information in a system like QRIS that consolidates information** across program types may help parents consider all their options. Search barriers may differ by the type of program being sought, particularly for 4-year-olds. Parents with 4-year-olds in child care may have missed the eligibility for Head Start or public preschool programs, the supply may have been limited, or they may have lacked the information needed or networks to connect with Head Start or a public preschool (Bassok et al., 2017).

Expanding the range of choice of programs for parents may be improved if Head Start and public preschool programs are able to **expand number of slots and expand the practical services needed by parents** such as extended hours and year-round programs (Bassok et al., 2017). Publicly funded pre-kindergarten programs offer additional options for families with 4-year-olds and can lead to a substantial expansion of the available care. However, care should be taken to anticipate system-level impacts when designing this type of large public preschool initiative to protect against reducing the amount of care available for children of other ages (Bassok et al., 2016).

More research is needed that gathers information firsthand from families on **how they select preschools and what the constraints are**, both those they are aware of and those they are not aware of, e.g., not having definitive information on the safety in the programs or the quality of the classrooms, specifically the teacher-child interactions. Parents' definitions of quality include elements that go beyond those that are supported by research. Talking directly to parents can help policy makers and programs to have a more inclusive approach to quality. This is especially important for parents of children with disabilities who often face greater constraints on their being able to select a preschool that meets their desire for a quality program that can support their child's particular needs as well as their practical considerations, e.g., location, cost, and hours. Preschool programs can also improve parent communication and support by having open-door policies that allow parents to observe the teacher-child relationships (Glenn-Applegate et al., 2016).

Encouraging families to enroll their children in early childhood education programs must address more than explaining the benefits. The Ressler study suggests that **understanding families' expectations for their children's future** educational attainment and the impact of maternal education attainment on families' choice to enroll their children in early childhood education programs can help in designing outreach programs, particularly for specific

racial/ethnic groups (Ressler et al., 2019).

Maternal employment patterns and the connection to child care can be better understood if the availability and affordability of the care is measured in the public, private, and informal market. Most research has focused on publicly supported child care rather than all three (Flynn, 2017; Morrissey, 2017). Maternal employment is supported by longer school days and universal preschool. After Washington, D.C. offered two years of universal preschool, maternal employment increased 12 percentage points, and 10 of the 12 were directly attributable to the child care expansion (Ruppanner et al., 2019, p. 3).

More **research is needed on the child care requirements of families in rural areas** versus urban areas to be able to create policies that are more focused on the unique needs of those families and the characteristics of the resources available to support them.

- If there is demand, use of schools, employer sites, churches and public capital financing for construction and expansion could be considered to develop more center-based care.
- Additional supports could be developed to help home-based and family child care improve quality of care. Different methods of communication about child care, its benefits, and its availability and accessibility may be needed to reach these families (Anderson & Mikesell, 2019).

Supporting **farmworkers and migrant and seasonal farmworkers** in their needs for child care offers special opportunities.

- Grower employers can facilitate connecting their workers with child care providers through hosting recruitment events and providing transportation services or financial support.
- Agribusiness leaders can provide training and technical assistance to growers on providing and supporting child care options.
- Technical assistance can help child care providers to use practices that support good communication and a positive relationship with growers and farmworker families, such as accommodating irregular work schedules, convenient parent workshop and conference times, and transportation.
- Funders of child care subsidies or scholarships can review eligibility criteria and application processes with farmworker parents to identify barriers to use of these supports (Liebman et al., 2017).

Addressing **access for children of color, particularly boys of color, to quality early education** can include solutions such as expanding the supply of child care with universal pre-kindergarten or expanded funding for child care subsidies through grants and matches. However, more targeted solutions are needed to address the needs of families of color.

- Provide technical assistance to programs that provide the type of care that minority families choose to help them be more receptive to and supportive of minority families.
- Include families of color in the design of initiatives to better inform access solutions.
- Collect data that includes information specific to minority families and gender to help clarify

what and where the needs are (Dobbins et al., 2016).

Preschools are a significant intervention in bringing about greater equity for children as they prepare for school, with 54% of all children attending preschool by age 4 (Ansari, 2017, p. 3) It was noted above (in Parents Preferences section), that there are significant differences in use of preschool between African American, non-Latino white and Latino families. Those differences are also found in the use of preschool by immigrant Latino families versus by native-born Latino families. This should be taken into consideration when making policy to support the use of preschool by Latino families (Ansari, 2017).

Supporting immigrant families' access to center-based child care can be improved by creating more early childhood programs in neighborhoods with lower affluence, reducing structural barriers. Programs that work to build collaborations within the neighborhood and create neighborhood-based friendship networks will have the best chance in supporting immigrant families' use of center-based care (Shuey & Leventhal, 2018).

Immigrant families can benefit from the use of formal child care, although they are less likely than nonimmigrant families to use formal child care, especially Latino families. Understanding the social and internal factors that influence Latina women's preference and decision making can help center-based providers in marketing to immigrant families to make these programs more accessible and attractive. Making programs reflect the preferences of immigrant families would help, for example, by hiring Latina women (Satkowski et al., 2016).

Employer-provided child care grant programs can help employees with the highest need as well as employees of higher ranks.

- Employees are more likely to use the program if they are introduced to it in person and particularly if it is introduced by a colleague.
- There is more participation in the program if it is universal, an invisible form of assistance (e.g., part of the benefits package), easy to access, and flexible in use with any type of care (Hipp et al., 2017).

State early care and education lead agencies may expand the accessibility and affordability of child care by working with employers in designing such programs. This review of research sheds light on common dynamics of the preferences and challenges of families seeking to access child care across the U.S. The following chapter summarizes new research that was conducted with families of young children in Washington State in 2019 and 2020, and sheds light on their concerns.

V. Parent/Family Voices

To capture concerns and challenges experienced by Washington’s families addressing their child care needs, two research studies were carried out directly capturing parent/family experiences: A statewide, online **Parent Survey** and a series of **Parent Engagement Sessions**, both intended to capture families’ direct feedback on the following high-level Research Questions:

- What are the child care preferences and needs of families in Washington?
- What are the barriers that families face in accessing child care?
- How do the barriers that families face in accessing child care affect their participation in the workforce?
- How do contextual factors (including income, education, occupation and geographic location) influence the child care decisions that parents make?
- How many children in Washington receive care provided by friends, family, or neighbors?

Parent Voices

Parent Survey online survey administered to over 1,500 respondents statewide

Parent Engagement Sessions, phone interviews and focus groups with 28 families from traditionally underrepresented communities

State Employee Child Care Survey, online survey administered to over 6,000 state employees

The questions posed in each research effort were broadly organized along these Research Questions, and are summarized below.

In addition, key findings from the **State Employee Child Care Survey**, which was administered in November 2019, are reported at the end of this chapter. A full detail analysis on this survey is in preparation by separate report.

As a caution, findings for each of these three efforts should be considered on their own. Each was carried out with different populations, approaches, data gathering instruments and analyses. The parent engagement sessions are particularly useful for illustrating parent perspectives and shedding light on parents’ stories of challenges and barriers. However, differences in findings among these research approaches do not invalidate any one of these efforts but should be considered in complement to one another.

A note about timing of this research: the Parent Survey and Parent Engagement Sessions were carried out in late March and April, while a statewide shutdown due to the COVID-19 pandemic had just been put in place. However, the questions asked parents to reflect on their recent care arrangements and experience in a typical or recent time window (e.g., in the previous year) – they were not explicitly asked about how the pandemic had impacted their employment and child care arrangements. Findings can be assumed as a whole to reflect typical arrangements pre-COVID, but it is possible that families’ concerns may have been influenced by recent events.

1. Statewide Parent Survey

1.1 Survey Overview and Methods

The statewide parent survey collected data from 1,536 adults residing in Washington State, with at least one child aged 0 through 12 years of age.

The survey was fielded in April 2020, and asked participants to respond based on child care arrangements and family situation within the past year, meaning that answers reflect largely conditions prior to the COVID-19 pandemic.

The survey utilized a non-probability sample design, with respondents drawn from online panels. The use of online panels provides researchers with the opportunity to more precisely target specific respondents using sample data collected from panelists when they join the panel. Utilizing this method, the survey targeted parents of children aged 0 through 12 years of age.

Non-probability sample designs are limited because there is not an equal chance of selection for residents of the state. Only state residents who are members of the respective panels have the opportunity to complete the survey. The survey results were weighted by state demographics – specifically age, race/ethnicity and education – to provide better representation of the state population. In addition, selected results were used to develop the Washington State economic impact model, described in Chapter VII (Economic Impact Analysis).

Panelists were provided by MFour Mobile Research, Inc. (MFour) and EMI Research Solutions (EMI). The MFour panel is strictly mobile-based, with panel members accessing surveys via a smartphone application “Surveys on the go”. Panel members in Washington State were recruited based on their smartphone’s geolocation tool. EMI is an online sample provider that utilizes a network of actively managed online research panels to blend desired sample characteristics.

1.1.1 Questionnaire

ICF and the Washington Department of Commerce collaborated to develop the content of the questionnaire. The survey instrument included 35 questions covering family demographics, child care arrangements including hours and costs, needs and preferences for child care, specific features/services desired and commute time, and employment and economic challenges faced in accessing care and/or encountering disruptions or concerns about child care. Respondent residential status in Washington State was verified by zip code.

The survey was available only in English. The survey instrument is provided in Appendix A.

1.1.2 Fielding

The survey was open for two weeks from April 8 to 22, 2020, and yielded a total of 1,536 responses. A total of 8,101 panelists were invited to participate in the survey. Panelists were invited to participate in the survey through their respective panel organization’s platform. MFour panelists were invited via push notification on their smartphone or through a listing on the smartphone application’s main page upon accessing the application. Upon selecting the link, the respondent was routed to the intro page of the survey. Panelists invited to the survey via EMI’s panel networks received notification of the survey through a variety of mediums, such as email,

and text message. Upon selecting the survey link, they were also routed to the survey instrument.

Weighting

The main limitation of nonprobability designs is that there is not an equal chance of selection for residents of the state, as only residents of the state who are members of the respective panels have the opportunity to complete the survey. The survey results were weighted by state demographics – specifically age, race/ethnicity and education – to provide better representation of the state population.

As Table 1 shows, the survey response was fairly well-matched to state population on education and race/ethnicity but with some differences. The survey permitted multiple selection of race/ethnicity categories whereas Census data is based on single selection; the survey yielded somewhat higher percentage of those who identified as white or Caucasian. The survey education categories were slightly different than those in the Census; the survey response group were skewed toward more college graduates. Weighting of survey results accounted for these factors.

Table 1: Demographic Comparison of State Population to Survey Response

	State Population	Survey Respondents
Gender		
Male	46%	46.2%
Female	54%	53.5%
Non-binary/X	---	0.1%
Education		
Middle school / some high school	11%	4.4%
High school graduate	22%	22.2%
Other post high school vocational training	---	5.7%
Some college or university	27%	17.4%
College graduate with a 2 year degree/	22%	33.40%
College graduate with a 4 year degree		
Completed some postgraduate /	18%	17.30%
Master's degree /		
Doctorate		
Race/Ethnicity		
Black or African American	5%	6.3%
Asian or Pacific Islander	15%	16.6%
White or Caucasian	58%	63.0%
American Indian or Alaska Native	--	3.2%
Hispanic or Latino/a	17%	17.2%
Other	6%	

The survey weighting did not include household income as a weighting factor due to variances in how national surveys and this survey ask this question (e.g., types and sources of income included). A comparison of national data and this survey's response set on income is below in Table 2.

Table 2. Comparison of Household Income, National Data and Survey Response

Household Income	WA Survey	
	National	Respondents
Less than \$20,000	4.1%	10.3%
\$20-40,000	10.0%	15.9%
\$40-60,000	13.0%	16.7%
\$60-80,000	12.9%	14.8%
\$80-100,000	14.5%	12.2%
\$100,000+	45.5%	30.1%

*National data source: 2018 and 2019 Community Population Survey

1.2 Parent and Family Demographics

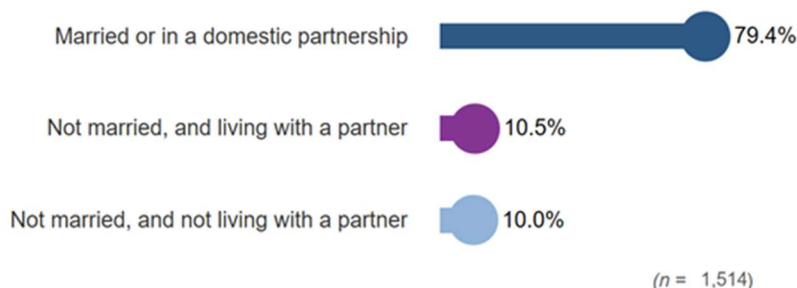
The survey asked for the respondent’s age and validated that they were at least 18 years of age in order to complete the survey. Demographics of respondents including age, marital status, gender, children in household, education completed, and household income are shown in Figures 1-7.

As noted above, weighting by race/ethnicity, age and education were used for all remaining questions to closely match the demographics of state population. All percentages reported in graphics and tables below are weighted. Additional detail is provided in Appendix B.

For demographics and other responses reported below, all responses of “prefer not to answer” were recoded to treat as missing and are not reported. (That is, all percentages reported below are based on those who gave a response.)

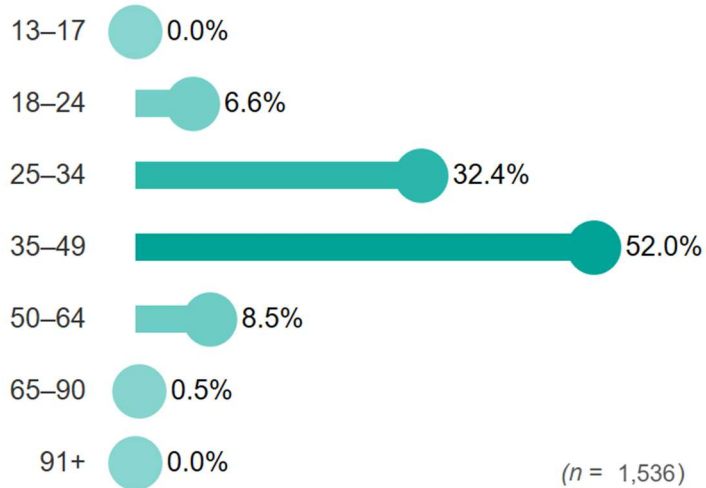
As Figure 1 shows, the majority (79.4%) of parent survey respondents were married or in a domestic partnership.

Figure 1. Parent Survey: Respondent Marital Status



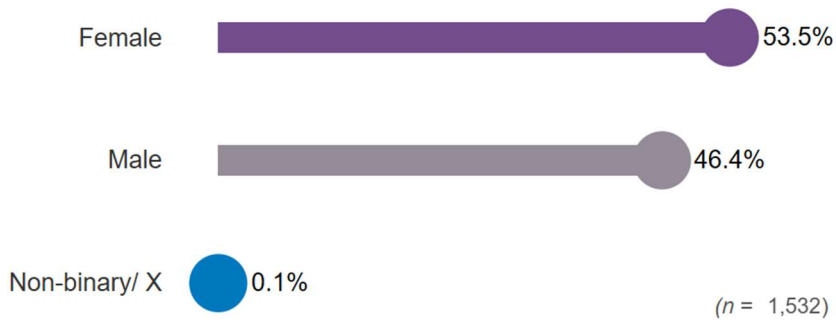
Just over half of respondents were from age 35 through 49, and nearly a third were age 25 through 34.

Figure 2. Parent Survey: Respondent Age



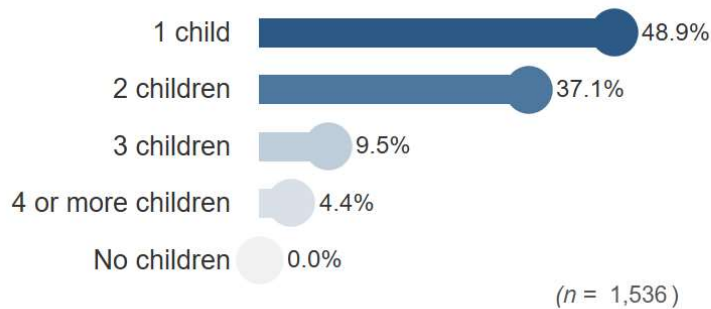
Just over half (53.5%) of respondents were female.

Figure 3. Parent Survey: Respondent Gender



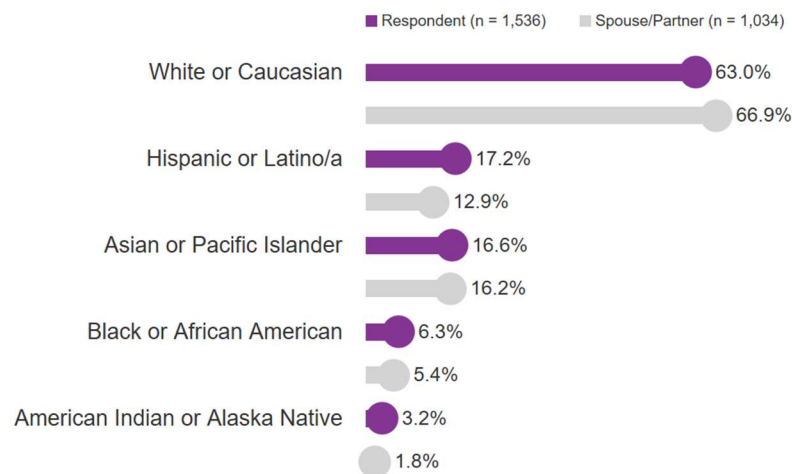
Survey participants were asked how many dependent children they had age 12 or younger, living with them for at least 3 months out of the year, including stepchildren or children for whom they were a legal guardian. (Age was asked by whole years; no increments were asked or reported). Almost half (48.9%) of respondents had one child age 0 through 12 in the household, and another 37.1% had two children.

Figure 4. Parent Survey: Children Age 0 through 12 in Household



Respondents were asked to select race/ethnicity to describe themselves; they were permitted to select more than one group. Nearly two-thirds (63.0%) of respondents described themselves as white or Caucasian, as were 67% of spouses. The next two largest racial/ethnic identifiers chosen were Hispanic or Latino/a (17% of respondents and 13% of spouses) and Asian or Pacific Islander (17% of respondents and 16% of spouses).

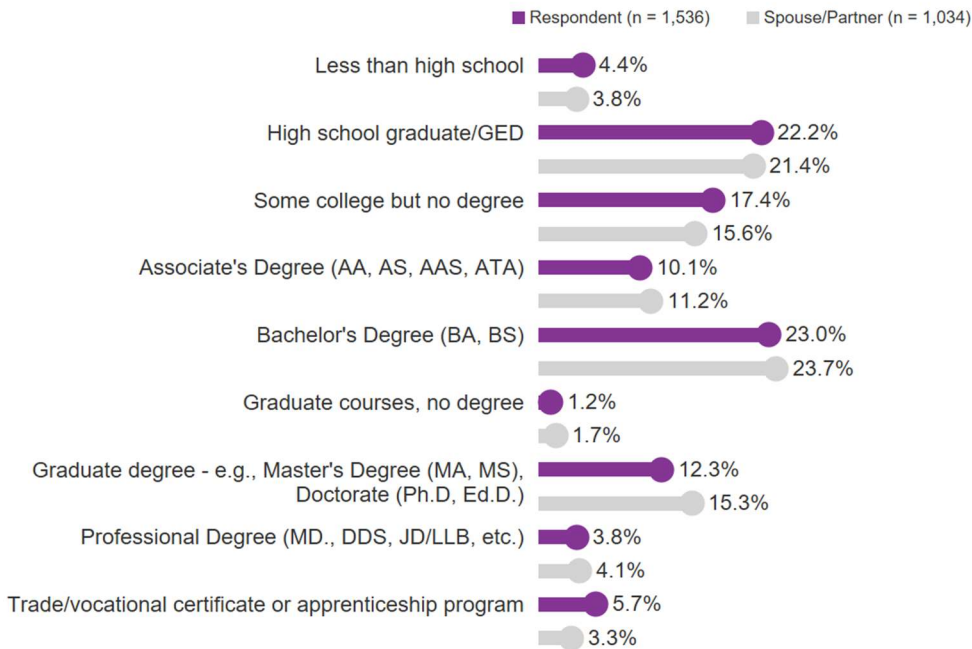
Figure 5. Parent Survey: Respondent and Spouse/Partner Race/Ethnicity



Note: Respondents selected all that applied, so percentages may sum to more than 100%

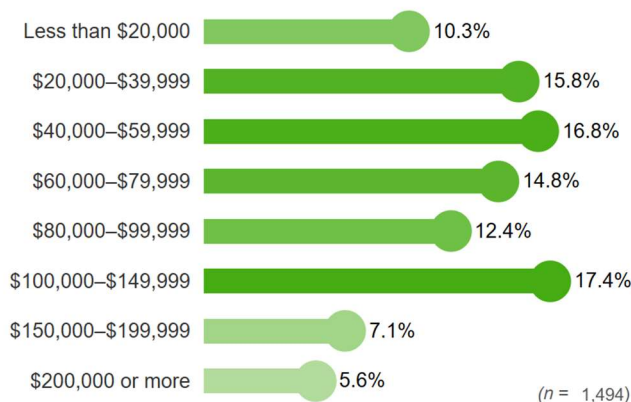
As Figure 6 shows, respondents' and spouses' highest education completed most commonly clustered around Bachelor's degree (23% of respondents, 24% of spouses), high school graduate (22% of respondents, 21% of spouses), or some college but no degree (17% of respondents and 16% of spouses).

Figure 6. Parent Survey: Respondent and Spouse/Partner Highest Education Completed



As Figure 7 shows, respondents' family/household income before taxes was clustered around the \$40,000-\$59,999 bracket, with another "peak" group at \$100,000-\$149,999. (Note that the range of the highest two categories is larger than the rest, most likely causing this bimodal distribution. Also note that the survey question asked for "estimated annual income before taxes" but did not provide a specific time window such as "last year" or "the previous 12 months".)

Figure 7. Parent Survey: Annual Family/Household Income Before Taxes



Respondents also provided their residential ZIP code, which was then classified as rural or urban/urbanized area¹. About two-thirds (66.7%) of parent survey respondents lived in an urban/urbanized area, 29.7% in a rural area, and the remaining 3.6% in a ZIP that was not classified.

1.3 Employment and Occupational Information

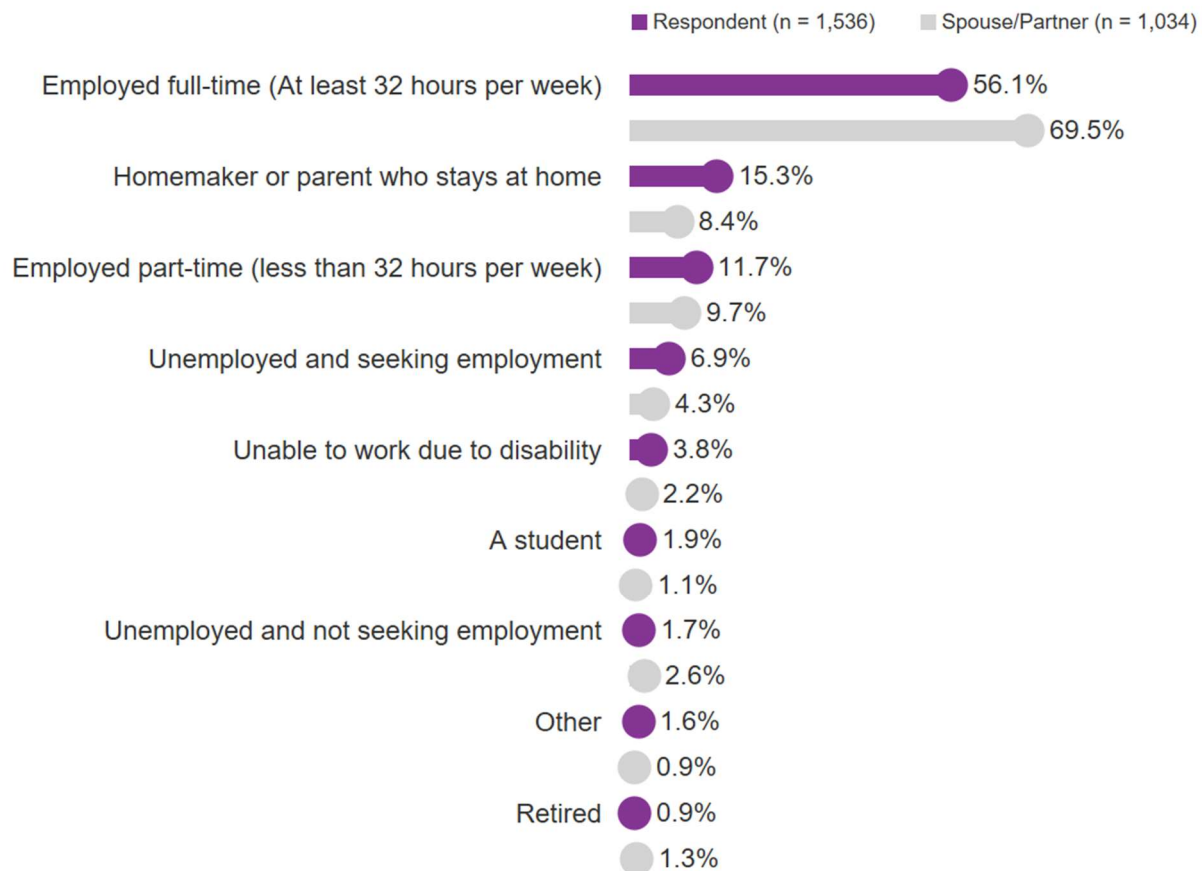
To understand employment and occupational characteristics of working parents, and to inform the economic impact analysis, respondents were asked to provide information on their employment, occupation and industry. Readers should keep in mind that the survey was fielded in April 2020, while the effects of the COVID-19 pandemic were just beginning to be felt, and employment circumstances are likely to have changed since the fielding window².

¹ Urban-rural classification: The analysis of survey data examined survey responses by urbanicity groupings, including urban areas, urbanized areas and rural areas. Washington State Highway Urban and Urbanized Areas (2013) are derived from Census Bureau boundaries and identify urban areas (population 5,000-49,999) and urbanized areas (population ≥ 50,000). Areas that were outside of an urban area or urbanized area were classified as living within a rural area. The analysis assigned survey respondents to an urbanicity grouping based on the respondent's zip code. Zip codes that could have more than one type of urbanicity grouping were assigned to the grouping that covered the largest land area within the zip code.

² Related to the sudden shutdowns caused by the COVID-19 pandemic, employment conditions changed rapidly just before and during the fielding of the survey. For example, during April 2020 the state unemployment rate increased from 5.1% to 15.4% - while this survey was in the field. Source: <https://esd.wa.gov/newsroom/april-2020-monthly-employment-report-payroll-employment-plummet-unemployment-rate-soars>

Survey respondents were asked to report their employment status and the employment status of their spouse or partner when applicable (asked only of those who said they were married/in a domestic partnership)—“today” --at the time of the survey. The majority of respondents, and the majority of spouses/partners, were working full-time at the time of the survey.

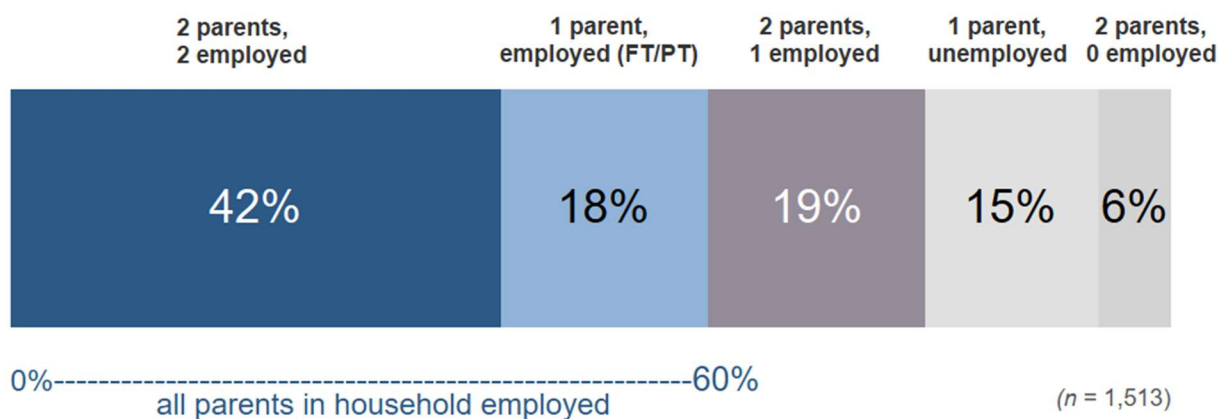
Figure 8. Parent Survey: Respondent and Spouse/Partner Employment Status at Time of Survey



A combined status was calculated to describe employment status at the time of the survey at the household level, shown in Figure 9 following. This status was also used as a breakout factor in later analyses. As shown in Figure 9, 60% of respondent households had all parents working at the time of the survey: About 42% of households had two working parents, and another 18% had a single parent, who was working.

This figure is sometimes used to approximate potential need for care, although it is not a perfect estimate due to possible variations in family circumstance, reasons for using child care, or accommodations made to work schedule. As a way to narrow focus to households most likely requiring child care for work, this subset is used as a breakout for some later analyses in this report.

Figure 9. Household Employment Status at Time of Survey



The next tables show the respondents' and spouse/partners' industry in the past 12 months, for those who were working or seeking employment, followed by occupations (same timeframe). As shown in Table 3 following, the most common industries of respondents' employment in the past year were Other Services, Education and Health Services, Information Technology, Manufacturing, and Construction. Most common industries of spouses were similarly Other Services, Education and Health Services, Information Technology, as well as Construction and Professional and Business Services. This information was used to inform the economic impact analysis.

Table 3. Parent Survey: Respondent and Spouse/Partner Employment Industry (Past 12 Months)

Employment Industry	Percent Respondent	Percent Spouse
Other services	24.0%	20.3%
Education and health services	14.9%	13.1%
Information technology	11.4%	12.7%
Manufacturing	8.4%	6.6%
Construction	8.0%	10.3%
Professional and business services	6.2%	8.8%
Government	6.2%	6.9%
Trade, transportation, and utilities	6.0%	6.9%
Financial activities	5.8%	5.6%
Leisure and hospitality	5.2%	4.4%
Natural resources and mining	1.0%	1.0%

As shown in Table 4 following, of those respondents working or seeking employment and choosing one of the 23 primary occupation responses, the most common occupations of the respondents were: Sales and Related (9.8%), Office and Administrative Support (9.4%), Computer and Mathematical (8.8%), Management (7.2%), Business and Financial Operations (6.2%), Healthcare Practitioners and Technical (6.1%). An additional 24% worked in Other Services.

Of those with a spouse working or seeking employment and choosing one of the 23 primary occupation responses, the most common occupations of the spouse/partner were: Computer and Mathematical (9%), Management (8.8%), Construction and Extraction (8.5%), Business and Financial Operations (7.6%), Sales and Related (6.7%).

Table 4. Parent Survey: Respondent and Spouse/Partner Employment Occupation (Past 12 Months)

Primary Occupation	Percent Respondent	Percent Spouse
Sales and Related Occupations	9.8%	6.7%
Office and Administrative Support Occupations	9.4%	6.4%
Computer and Mathematical Occupations	8.8%	9.0%
Management Occupations	7.2%	8.8%
Business and Financial Operations Occupations	6.2%	7.6%
Healthcare Practitioners and Technical Occupations	6.1%	5.2%
Food Preparation and Serving Related Occupations	5.4%	3.5%
Construction and Extraction Occupations	5.0%	8.5%
Education, Training, and Library Occupations	4.9%	5.1%
Transportation and Materials Moving Occupations	4.3%	5.1%
Healthcare Support Occupations	4.2%	6.0%
Production Occupations	3.5%	1.8%
Personal Care and Service Occupations	3.5%	2.3%
Installation, Maintenance, and Repair Occupations	3.0%	4.1%
Architecture and Engineering Occupations	2.5%	2.7%
Community and Social Service Occupations	1.7%	1.6%
Arts, Design, Entertainment, Sports, and Media Occupations	1.7%	1.6%
Protective Service Occupations	1.6%	1.0%
Life, Physical, and Social Science Occupations	1.5%	1.1%
Legal Occupations	1.3%	0.8%
Building and Grounds Cleaning and Maintenance Occupations	1.3%	0.6%
Farming, Fishing, and Forestry Occupations	0.8%	1.4%

1.4 Child Care Arrangements

1.4.1 Child Care Arrangements Used

Respondents were asked to report for up to their four youngest children, on any child care arrangements used consistently in the last year, and could choose multiple child care arrangements for the child. Options were not mutually exclusive. In other words, they indicated all care arrangements used, not just their primary arrangement or the arrangement used most of the time. For example, children could be cared for at some point by a parent AND in a center AND by another family member. In these cases, the child was counted in each setting where they were cared for. This is an important aspect of the survey design to keep in mind when

reviewing the results following— children were reported as being cared for in multiple settings, and by design totals add to far greater than 100%.

Wording of care setting options was as shown in the Figure following. (No additional definition was provided for “other preschool program” which would likely have been understood as including private preschool or pre-K, or for “stay with a neighbor or friend,” which is often referred to by the field as FFN care.)

To improve accuracy, additional corrections were applied in data cleaning to the responses based on hours of care in each setting – if a setting was selected but the respondent said they used “0” hours of care each week for that setting for that child, the response was re-coded to be treated as not used by that child. In addition, age-inappropriate care arrangements were excluded, e.g., selections of Head Start or other preschool options for children older than 6 years at time of survey.

The following analyses summarize several approaches to these data: All types of care used per child (multiple types possible), total number of care arrangements per child, and primary non-parental care arrangement per child.

All care arrangements used

Summary of multiple care arrangements was based on responses reflecting all children reported by respondents, in all settings used consistently in the last year. For all age groups, the most common or frequent arrangement was staying at home with parent/step-parent/guardian. As noted earlier, this does not mean that this is the primary care arrangement for most children, but only that this arrangement was the one most frequently named for the highest percentage of children at least some of the time in the past year, among all the multiple settings potentially being used.

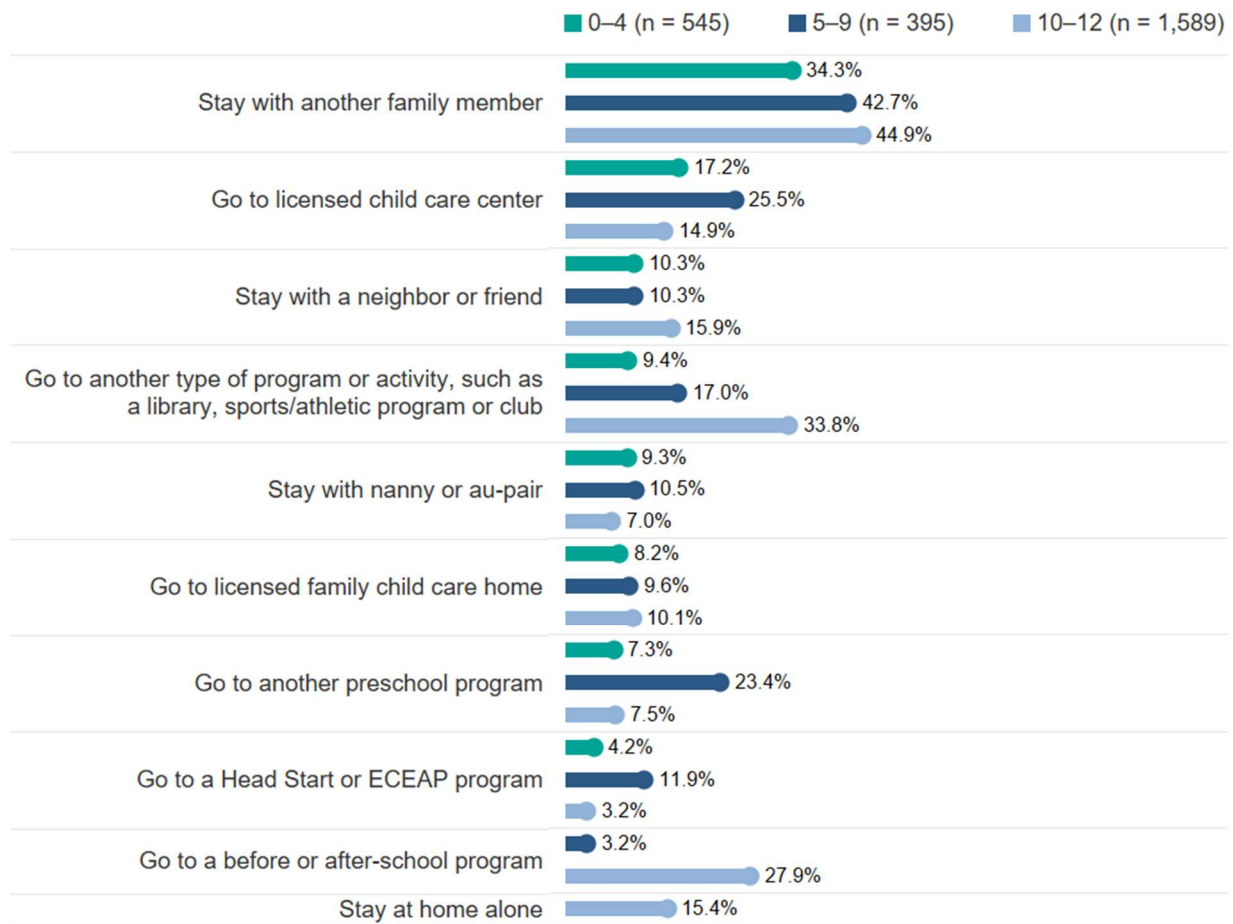
Figure 10, following, shows patterns of non-parental child care arrangement by age of child, reported in whole years. As noted above, children could have been reported as being cared for in multiple settings, so totals add to far more than 100%.

Focusing on non-parental care arrangements, the most common arrangement for all age groups was staying with another family member, as shown in Figure 10.

- For children ages 0 through 4 years of age, the next most common non-parental arrangements were licensed child care center, staying with a neighbor or friend, or other program/activity.
- For children ages 5 through 9 years, the next most common non-parental arrangements were licensed child care center, other preschool program, or other program/activity.
- For children ages 10 through 12 years, the next most common non-parental arrangements were other program/activity, before- or after-school program, or staying with neighbor or friend.

Respondents reported that “stay home alone” was used by 15% of the 10- through 12-year-olds. (As noted, the responses have been “cleaned” to remove responses for those who selected the option but said they used it for zero hours. Note that “stay at home alone” was excluded from responses for children age 0 through 4 as it would most likely have been chosen in error or misunderstanding. It is also possible that some respondents interpreted this option as staying home alone with a parent while the other parent is working.)

Figure 10. Parent Survey: Multiple Non-parental Child Care Arrangements by Age of Child



Additional breakouts by race/ethnicity, family incomes, and other factors are shown in Appendix B³. Key differences are shown below.

Examining differences by racial/ethnic groups, the most common non-parental care arrangement across racial/ethnic groups was another family member, followed by another program or activity such as a library, sports/athletic program or club. Some racial/ethnic group differences were seen in less commonly used arrangements.

- Respondents reporting as Hispanic or Latino/a most frequently selected another family member (48.6% of respondents), another type of program or activity, such as a library, sports/athletic program or club (25.1%), or a neighbor or friend (14%) for their child care arrangement when their child(ren) are cared for by someone other than the parent, step-parent, or guardian.

³ Appendix B provide breakouts by various demographics. Note that multi-layered breakouts are not provided as they result in many small subgroups of less than 50 responses each, which is not recommended for reporting. Statistical significance tests are not provided here. Survey methodologists advised that significance tests would not be meaningful due to the non-probability survey sampling approach. This is distinct from the approach used for the state employee survey which was directed to all eligible participants (a “census” approach) and is more appropriate for significance testing.

- Non-Hispanic white respondents reported using another family member (39.4%), another type of program or activity, such as a library, sports/athletic program or club (25.9%), and a before- or after-school program (19.3%) most frequently.
- Non-Hispanic Black respondents reported using another family member (36.3%), another type of program or activity, (25.1%), or a licensed child care center (23.3%) most frequently.
- Non-Hispanic Asian/Pacific Islander respondents reported using another family member (39.8%), another type of program or activity, such as a library, sports/athletic program or club (23.8%), and a licensed child care center (13.7%).
- Other non-Hispanic respondents reported using another family member (56.1%), another type of program or activity, such as a library, sports/athletic program or club (24.2%), or a friend or neighbor (21.4%) most frequently.
- Non-Hispanic Black respondents were more likely than respondents of different race/ethnic backgrounds to select nanny or au-pairs, licensed child care centers, preschool programs (not Head Start/ECEAP), and before- or after-school programs.
- The child staying at home alone all or part of the time was also most likely to be selected by white respondents.
- Licensed family child care was more likely to be selected by white or Asian/Pacific Islander respondents than was the case for other groups. Head Start/ECEAP was most likely to be selected by other non-Hispanic respondents.

While program/activity is among the most common non-parental care arrangements regardless of income, there were some differences by income.

- Families in the lowest income bracket (respondents reporting an annual family income after taxes of less than \$20,000), were more likely to select a program or activity, such as a library, sports/athletic program or club (14%), a neighbor or friend (13%), or a licensed child care center (10.2%) for their child care arrangement when their children are cared for by someone not related to the child.
- Respondents reporting an annual family income between \$20,000 and \$39,999 most frequently selected a program or activity, such as a library, sports/athletic program or club (19.4%), before- or after-school program (16.7%), or neighbor or friend (16.8%) as their child care arrangement.
- Respondents reporting an annual family income between \$40,000 and \$59,999 selected a program or activity, such as a library, sports/athletic program or club (24.1%), before- or after-school program (16.5%), or a neighbor or friend (12.6%) for their child care arrangement.
- Respondents reporting an annual family income between \$60,000 and \$79,999 most frequently selected a program or activity, such as a library, sports/athletic program or club (20.8%), a licensed child care center (12.9%), or a preschool program (9.8%).
- Respondents reporting an annual family income between \$80,000 and \$99,999 were most likely to select a program or activity, such as a library, sports/athletic program or club (19.5%), a before- or after-school program (17.1%), or a licensed child care center (13.3%) for their child care arrangement.
- Respondents reporting an annual family income between \$100,000 and \$149,000 most frequently selected a program or activity, such as a library, sports/athletic program or

club (34.1%), a licensed child care center (18.5%), or a before- or after-school program (18.4%).

- Respondents reporting an annual family income between \$150,000 and \$199,999 most frequently selected a program or activity, such as a library, sports/athletic program or club (39.8%), a licensed child care center (28.8%), or a before- or after-school program (27.9%) for their child care arrangement.
- And respondents reporting an annual family income of \$200,000 or more most frequently selected a program or activity, such as a library, sports/athletic program or club (51.8%), a licensed child care center (45.6%), or a before or after-school program (42.2%) for their child care arrangement.

Care arrangements did not differ noticeably by respondent education.

Household structure and employment were associated with some differences in care arrangements. For example, single parents' care arrangements differed somewhat depending on whether they were employed.

- Unemployed single parents most frequently selected a program or activity, such as a library, sports/athletic program or club (17.3%), a licensed child care center (12.5%), or a before- or after-school program (10.7%) for their child care arrangement.
- Employed single parents most frequently selected a licensed child care center (23.6%), a program or activity, such as a library, sports/athletic program or club (22.4%), or a neighbor or friend (22.5%) as their child care arrangement.

Likewise, among two-parent households, care arrangements differed for employed and unemployed respondents:

- Respondents reporting as a two parent household where neither parent was working most frequently selected a program or activity, such as a library, sports/athletic program or club (19%), a neighbor or friend (11.5%), or a before- or after-school program (10.9%) as their child care arrangement.
- Respondents reporting as a two parent household where one parent was working likewise most frequently selected a program or activity, such as a library, sports/athletic program or club (21.3%), but their next most common arrangements were a preschool program (other than Head Start/ECEAP) (12.5%), or a before- or after-school program (8.6%) as their child care arrangement.
- And respondents reporting as a two parent household where both parents are working most frequently selected a program or activity, such as a library, sports/athletic program or club (30.8%), but their next most common arrangements were a before- or after-school program (23.5%) or a licensed child care center (23.2%) as their child care arrangement.

Respondents living in urban/urbanized areas most frequently selected a program or activity, such as a library, sports/athletic program or club (26.5%), a before- or after-school program (19.6%), or a licensed child care center (19.1%). Respondents living in rural areas most frequently selected a program or activity, such as a library, sports/athletic program or club (21.8%), a neighbor or friend (14.8%), or a before- or after-school program (11.5%) for their child care arrangement.

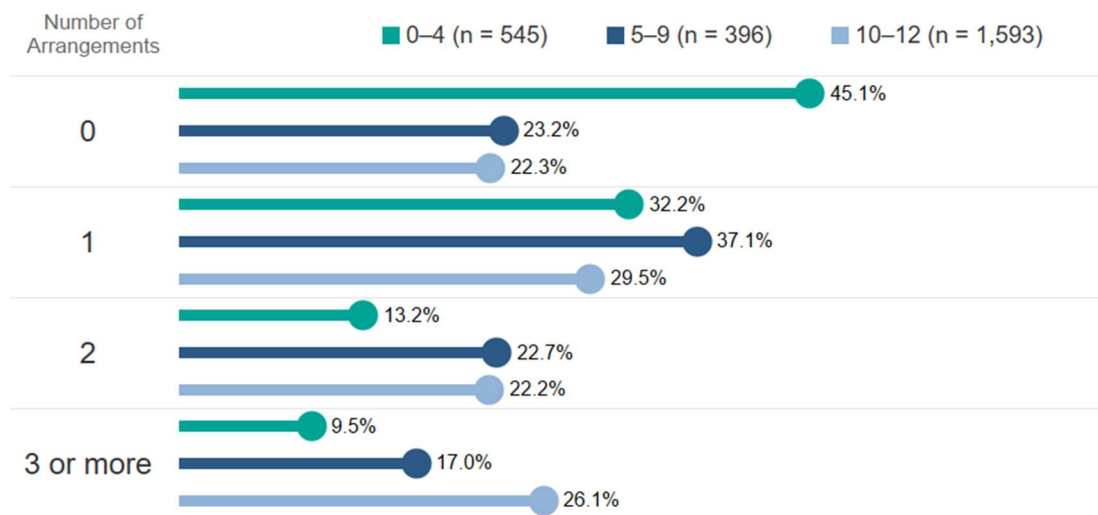
Number of Non-parental Care Arrangements

For each child, the total number of non-parental care arrangements used was calculated, including only those for which the hours used was greater than zero. Figure 11 below shows the frequencies of children by number of non-parental care arrangements.

Overall, 29% of children were in zero (0) non-parental care arrangements, – that is, not using any care other than that of a parent/step-parent or guardian, and another 31% were in only one non-parental care arrangement. Another 20% experienced two non-parental arrangements, and 20% of children were in three or more arrangements.

However, there were important differences by age group, shown in Figure 11. Children age 0 through 4 were far more likely to be in no (zero) non-parental care arrangements than were older children. Older children (age 10 through 12) were more likely to be in three or more arrangements than were younger children.

Figure 11. Number of Non-parental Care Arrangements per Child, by Age Group



Additional breakouts are provided in Table B.12 in Appendix B.

Use of higher number of arrangements is clearly associated with household employment status. Breakouts in Table B.12 in Appendix B show that in households in which all parents are working, about 20% of children are in zero non-parental care, compared with 39.5% of children in households where there is a non-employed parent. On the other hand, in households with all parents working, 26.6% of children are in three or more arrangements, compared with 11.6% of children in households where there is one non-employed parent.

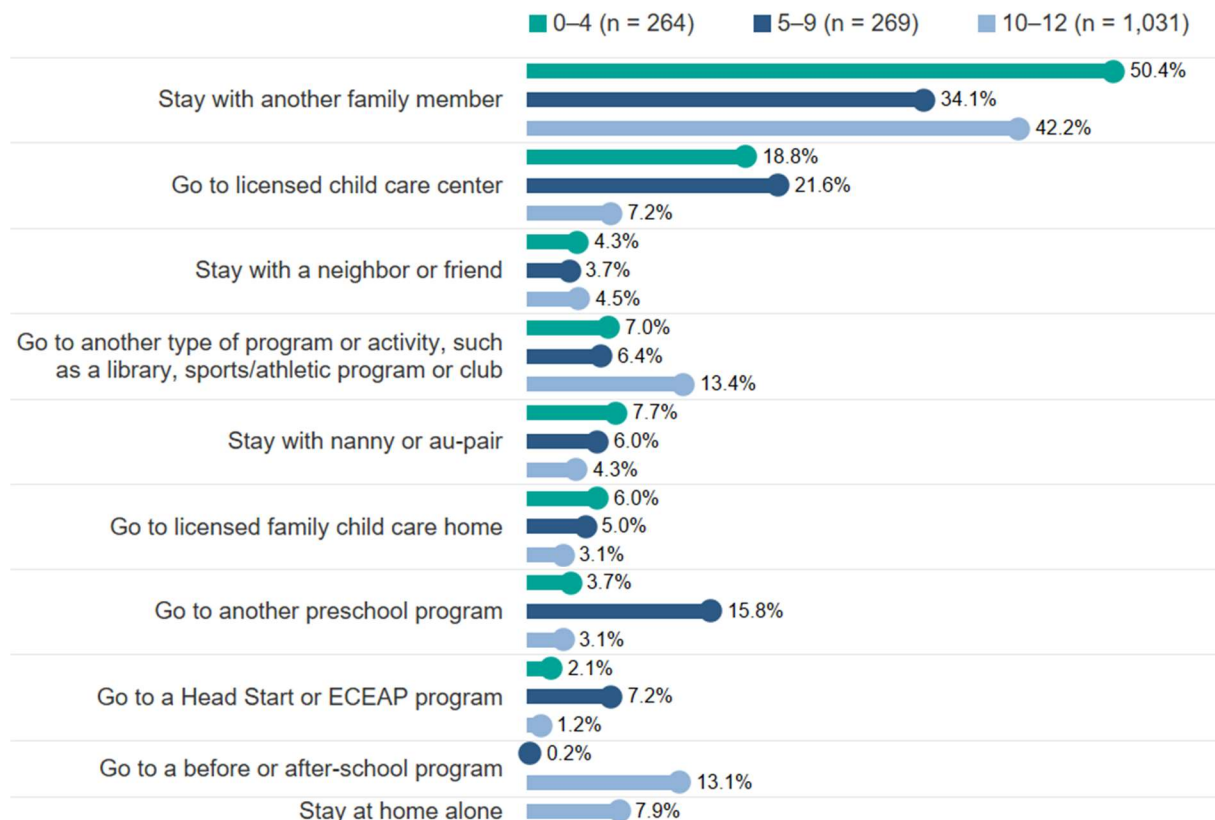
In addition, use of three or more arrangements is more likely among children of white and American Indian/Alaska Native (AIAN) parents compared with Hispanic, Black or Asian/Pacific-Islander parents.

Primary Care Arrangement

Additional analysis was conducted to calculate a primary non-parental care arrangement using the hours in each arrangement, not including parent/step-parent/guardian care. For each child with at least one non-parental care arrangement, the arrangement that was identified as having the most hours in care was identified as the “primary” non-parental care arrangement. For a portion of children (approximately 15% of the total), no single primary arrangement could be determined by hours used as there were two or more arrangements used for the largest number of hours for that child, resulting in a somewhat smaller subset of children for this analysis.

Figure 12 below shows the frequency of children in each primary non-parental care arrangement. Among children ages 0 through 4, the most common non-parental primary care arrangement was staying with another family member (50% of children), followed by licensed child care center (19%). For children age 5 through 9, the most common non-parental primary arrangement was another family member (34%) followed by licensed child care center (22%) and then other preschool program (16%). For older children ages 10 through 12, stay with another family member was most common (42%) followed by another type of program or activity (13%) and before- or after-school program (13%).

Figure 12. Primary Non-parental Care Arrangement by Age Group



A few other trends are apparent in additional breakouts provided in Table B.13 in Appendix B.

- While care with another family member was the most common primary non-parental arrangement for all ethnic groups, it was less likely among children of white and Black parents (37.8% and 36.5%, respectively) compared with children of Asian/Pacific Islander, American Indian/Alaska Native (AIAN) and Hispanic parents (45% to 54%).
- Care with another family member as primary non-parental arrangement was somewhat more common in rural areas (48%) than in urbanized areas (41%).
- Use of a child care center as primary arrangement also varied by race/ethnicity, being most likely among children of Black parents (19.5%) and least likely among Hispanic parents (6%).
- It was also notable that there is a clear association between use of a licensed child care center (consistently identified as the most expensive type of regulated care) and household income: those with lower income are least likely to use this type of care as a primary arrangement, and those with higher income most likely (ranging from 6% to 26%).
- Use of licensed child care center as primary arrangement is also more common among those in an urbanized area (12.6%) vs. those in rural areas (8.7%).

Respondents were also asked if they used a different child care arrangement for their child in the previous summer.

- Of those reporting a different summer child care arrangement, most commonly children stayed at home with a parent, stepparent, or guardian (78% of children 0 through 4, 79% of children 5 through 9, and 68% of children 10 through 12).
- Most common non-parental care arrangements for children being cared for in a different setting in summer were:
 - For 0 through 4 year olds, stay with another family member, go to licensed child care center, or stay with nanny/au-pair.
 - For 5 through 9 year olds, stay with another family member, go to licensed child care center, or other program/activity
 - For 10 through 12 year olds, full-day school-age or day camp, stay with another family member, or other program/activity.
- Additional breakouts are shown in Table B.38 in Appendix B. Breakout findings on summer-only child care arrangements should be interpreted with great caution, as they are based on a very small subset of children (332 total children, which is 12.8% of the total base of approximately 2,600 children for whom care arrangements are reported). Note that these summer-only arrangements were not explored further for hours used and therefore could not be corrected to exclude responses where the option was selected but hours were reported as zero.

Estimating children by care arrangement statewide

The reported child care arrangements could potentially be used to estimate children in the state using various care arrangements, by applying the percentage using each arrangement for children by age group to population estimates from the American Community Survey. The analysis provided here can address two major possibilities: Multiple care arrangements data can describe the total number of all children ever served in various settings. Primary care

arrangements data can address where most children are most often served, or where children are most often cared for on a typical day.

1.4.2 Hours and Costs of Care

Hours of care and costs paid for care, including breakouts, are shown in Appendix B.

Hours in Care

Respondents were asked for the average time children spend in child care each week, for each child in each setting they selected. The analysis shows the average total time is a little over 78 hours per week, however this includes time reported being spent with a parent, step-parent, or guardian. Additional analysis may be of interest; for example, future analysis could remove parental care from totals to capture total time in non-parental care.

Based on preliminary results, some trends appear:

- Non-Hispanic white families reported longer periods of time that their children are in care, and Non-Hispanic Black families reported the least amount of time.
- Families earning \$20,000 – 39,999 annually reported a higher number of hours their child(ren) are in care each week, while families with the highest annual incomes (over \$150,000) report the least time for their child(ren) to be in a care arrangement.
- Non-Hispanic Asian/Pacific Islander families reported more time spent with a parent, step-parent or guardian than other family types do. Respondents reported substantially less time spent with another family member, friend, or neighbor regardless of the respondent or family demographics, which may indicate that these care arrangements are used perhaps informally to fill in gaps (i.e., before school, between parent work shifts).
- Of interest, the average time spent in all other care arrangements is part-time (less than 20 hours per week). Since full-time working parents are represented in the survey, it seems that many may possibly be using a combination of child care arrangements to meet their child care needs each week.
- Also noted, respondents with annual household incomes between \$20,000-\$39,999, those living in rural areas, and children between the ages of birth to 4 years are more likely to spend more hours each week in any of the child care arrangement options.

Hours of care tables show only results for greater than zero, that is, responses of “0” hours per week are not included. Findings should be considered preliminary and further analysis may be needed for full understanding.

Costs of Care

The average amount paid for child care of any form in Washington on a weekly basis by families responding to the survey is about \$150. Some respondents report paying nothing for their child’s care while others report paying 10 times the average each week. Additional analysis may be needed to understand the wide variance in reported costs for care.

- Non-Hispanic Black families pay the most for their child’s care each week, and Hispanic respondents pay the least.
- When comparing the annual household income levels with the cost of child care, the levels are consistent. In other words, lower income families pay the least amount each

week for their child's care and higher income families pay the most. The highest level of education reported for the respondent is also reflective of the amounts paid: those with a high school or less education, who are presumably those with lower paying jobs, pay the least while those with graduate level degrees pay the most.

- Working single parents and families with two working parents pay more than families where at least one parent is not working. Additional analysis may be needed to understand what two parent families with only one parent working use as their child care arrangement.
- Interestingly, respondents reported paying more for their child(ren) ages 5-9 years than they do for younger children (birth to 4).
- The average cost of care paid by respondents for child care at a licensed child care center, a family child care home, or a preschool program (not Head Start or ECEAP) are higher than other care arrangements -- with the amounts paid for the 5-9 year age group again being higher than the younger and older age groups.

Costs paid for care should be interpreted with great caution and the data should be considered preliminary at this time as further review and exclusion of outliers may be needed. Note that many families responded that they used a care setting but paid \$0 for the care - this is a legitimate scenario as some family or friends may provide free care, or families using subsidized, ECEAP or Head Start care may pay \$0. Therefore, these responses are included in tables as noted in the Appendix. Subsidy receipt was not asked for each setting used for each child, so we are not able to report on this detail. (Financial assistance for child care received by the household is reported later in this section). Finally, some respondents also reported that they pay a cost for care provided by a parent, stepparent or guardian. This is hard to interpret.

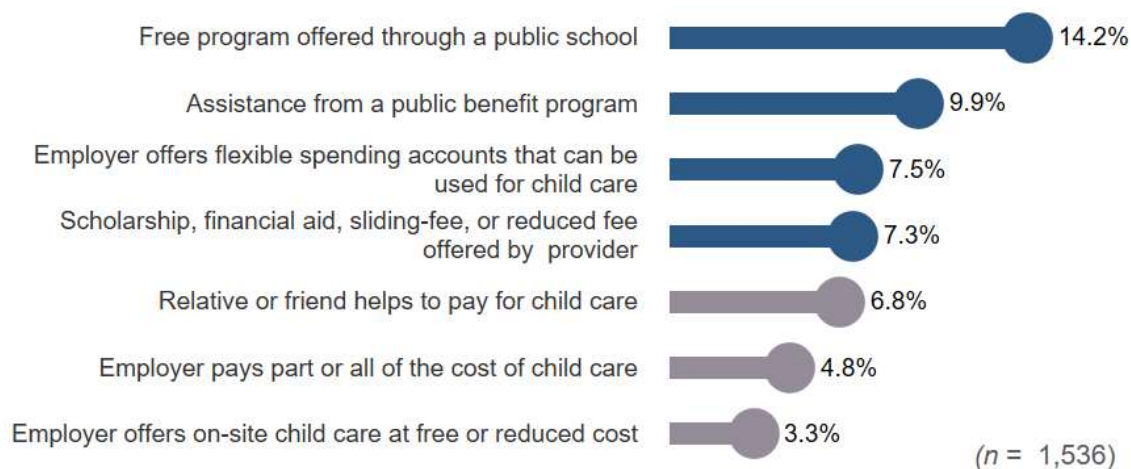
Detailed analysis of cost paid, as well as costs per hour per child could be explored in later follow-up.

Another perspective on costs paid for care can be considered in the child market rate survey, which is summarized briefly in the supply/demand section of this report. The market rate survey reflects "full-fare" costs charged by a provider for care at full-time levels. This is distinct from out-of-pocket costs paid by an individual family for their own care arrangements, which is often less than full market rate and may be adapted to families' own circumstances, such as use of part-time care, receipt of subsidy, sibling discounts or other individual factors.

1.4.3 Receiving Child Care Assistance

Over a third of respondents (38.5%) reported that their family receives some kind of financial assistance paying for child care from one or more sources. This was reported at the family level, rather than per each individual child. In other words, we did not capture whether costs paid per child account for subsidy.

The most common type of assistance received was using a "free program offered through a public school" (14.2%), followed by assistance from a public benefit program such as Head Start, ECEAP, Working Connections, or city-funded program (9.9%), or an employer flexible spending account for child care (7.5%). Additional detail is shown in Figure 13 following.

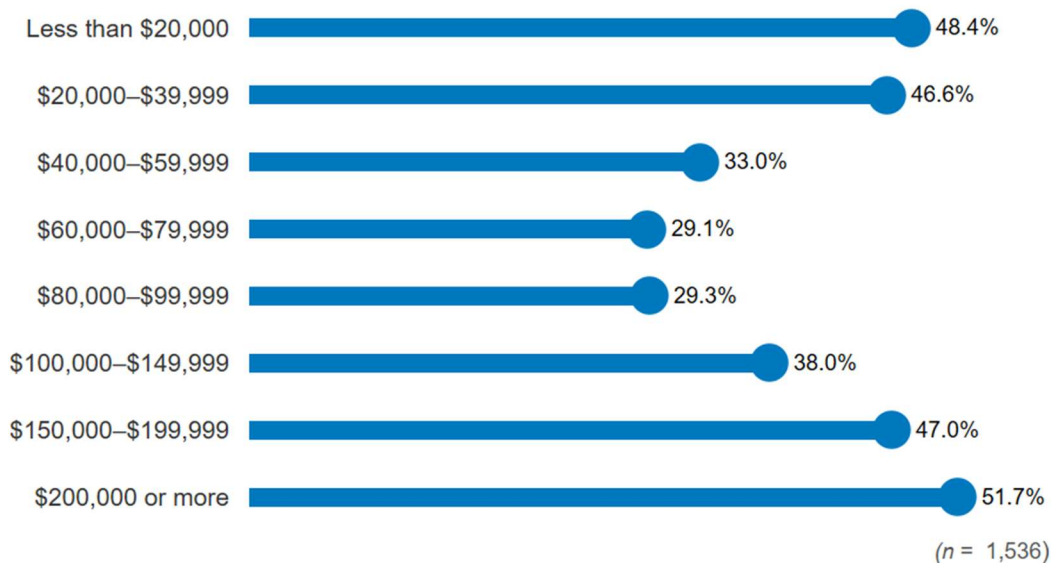
Figure 13. Parent Survey: Respondents Receiving Financial Assistance for Child Care, by Type

Some group differences were seen in receiving financial assistance (see Appendix B for breakouts).

- By age group: About 26% of respondents who only have children under the age of 5 years, 48% with children only between the ages of 6 and 12 years, and 23% having children in both age groups reported receiving child care assistance. That is, families with a younger child, or both younger and older children, are more likely to receive assistance than those with only an older child.
- By racial/ethnic groups: Nonwhite respondents were far more likely than white respondents to receive some form of assistance for child care costs. Almost half of Hispanic respondents (45.7%) reported receiving child care assistance. For non-Hispanic respondents, 33.7% of white, 47.4% of Black, 40.2% of Asian/Pacific Islander, and 52.3% American Indian/Alaska Native (AIAN) respondents reported receiving child care assistance.
- By income: Respondents with mid-level incomes were least likely to be receiving some form of financial assistance, compared with those at both lower and higher levels. While this pattern does not clearly track with increase in income, it is likely due to receiving different types of assistance in different circumstances (public benefit, employer-based); see Appendix B.

Figure 14. Households Receiving Any Form of Financial Child Care Assistance, by Income

1.3.3 Received any CC Asst by Income



Those with graduate education were more likely to receive some form of assistance: 38.6% of respondents with a high school diploma or less, 34.6% with some college, 36.7% with a college degree, and 45.8% with an advanced degree reported receiving child care assistance. Of the single parent respondents, 55.2% of those who were unemployed and 44.4% of those working full- or part-time reported receiving child care assistance. 40.4% of the respondents in two parent households where neither parent is working, 24.9% of respondents where one parent is working, and 38.6% where both parents are working reported receiving child care assistance. (Those who were unemployed at the time of the survey may have received assistance in the recent past when working, or they may have been referring to a subsidized early learning program such as Head Start or ECEAP.)

A small difference was seen in urban-rural comparison. The respondents in an urban/urbanized area were somewhat more likely to report receiving child care assistance (39.9%) compared with 33.4% of respondents in rural zip codes.

Additional breakouts by assistance type are in Table B.47 in Appendix B. As might be expected, type of financial assistance received varies by income level.

1.5 Child Care Needs and Preferences

Respondents were asked about their preference in a child care setting. Unlike with care arrangements actually used for each child, this question was asked as a single preference (select one option from a list) and was asked only once for the respondent parent, not separately for each child in care.

In addition, the list was somewhat simplified from the list of recent child care arrangements presented for each child. The two questions (current/recent arrangement and preferred child care arrangement) are not identically structured and are therefore difficult to compare directly.

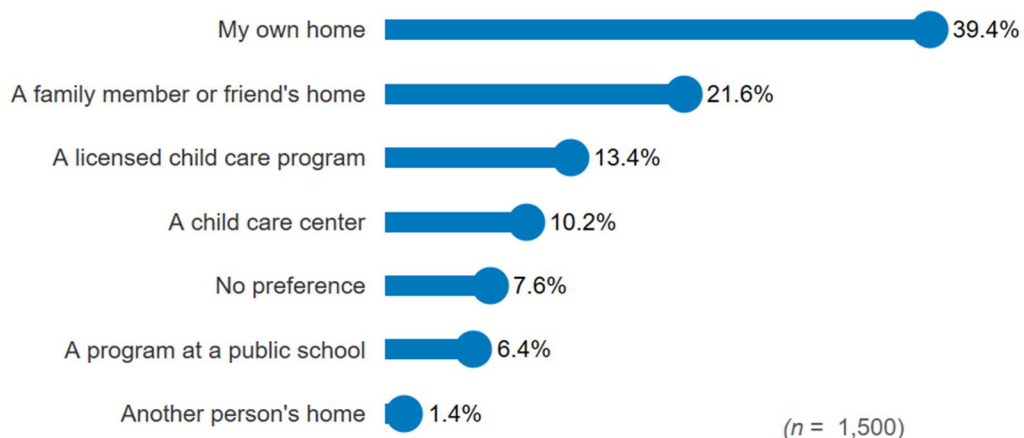
Over a third (39.4%) of respondents prefer child care provided in their own home, and another 21.6% prefer child care provided in a family member or friend's home. Just 13.4% prefer child care provided in a licensed child care program, 10.2% prefer child care provided in a child care center, 6.4% prefer child care provided in a program at a public school, and 1.4% prefer child care provided in another person's home. 7.6% had no preference for the setting of their child care.

Overall, over half (61% combined) prefer child care to be provided in their own home or the home of a family member or friend. Only a small group (16.8% combined) said they preferred a center- or school-based program. However, these preferences differ slightly by age of child. Respondents with a child or children under the age of 5 preferred formal care arrangements (i.e., child care centers and licensed child care programs) while those with school-age children (6-12 years) reported preference for more informal arrangements (i.e., family and friend's home or their own home). Just over half of the respondents with a child or children under age 5 (55.2%) prefer care provided in the home of a family member or friend or in their own home. This was higher with respondents with children between 6 and 12 years of age (65%). However, respondents with younger children preferred a center- or school-based program more often (20.6%) than those with older children (14.4%).

The wording of the options does not mirror the options for care setting in current/recent care arrangements, and may have caused some confusion for respondents. In particular, the list did not include the "licensed family child care home" category. In hindsight, this may be a design weakness for this question.

One possible way to look at these responses for clearer understanding is to combine several responses to look at preference for informal home-based arrangements vs. formal arrangements. While 39.4% prefer care in their own home, another 23.0% combined prefer care in a family member or friends' home, or another person's home. About 20.0% combined prefer care in a formal setting (licensed child care program, child care center, or program at a public school), and 7.6% have no preference. Future analysis might explore these roll-up categories.

Figure 15. Parent Survey: Preferred Child Care Setting



Regardless of child age, most parents preferred care in their own home, or in a family member or friends’ home; however, some variation by age group arose among other non-home-based options.

Preferences were examined by age group for families with a child only in the 0 through 4 age group, those with children ages 0 through 4 and children ages 5 through 12, and for those with children only in the 5 through 12 age group.

Table 6. Parent Survey: Preferred Child Care Setting by Age of Children in Household

Age of Children	N	A child care center	A family member or friend's home	Another person's home	My own home	A licensed child care program	A program at a public school	No preference
Total	1,500	10.2%	21.6%	1.4%	39.4%	13.4%	6.4%	7.6%
0 through 4 only	381	16.4%	18.3%	1.7%	35.2%	18.9%	4.2%	5.3%
0 through 12 (both age groups)	352	10.1%	20.5%	0.9%	42.8%	10.9%	7.2%	7.6%
5 through 12 only	722	6.9%	23.9%	1.2%	40.9%	11.1%	7.4%	8.5%

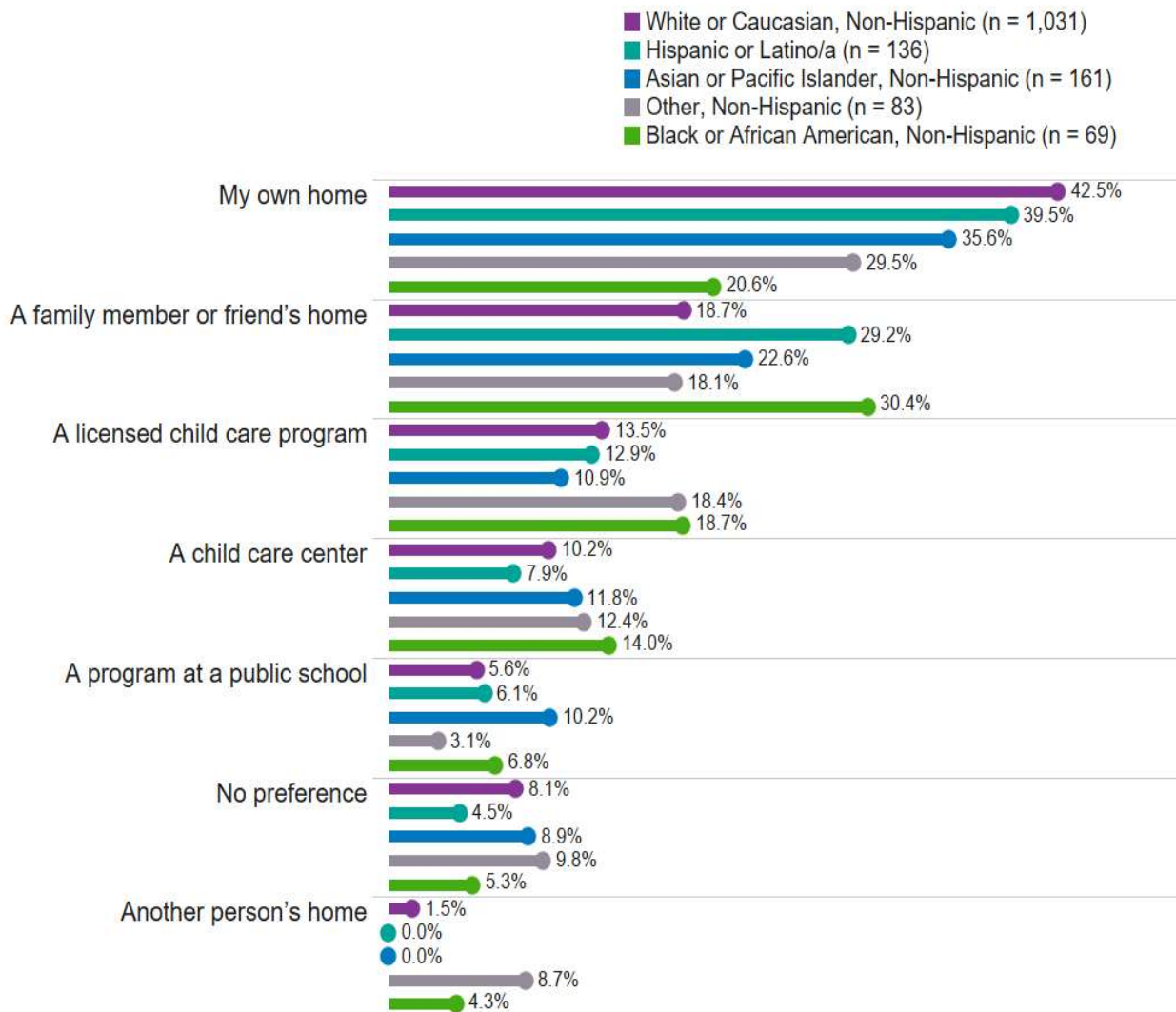
Parents clearly prefer a home-based setting (their own or a family member or friends’ home) over all other options regardless of age of child, but for young children (age 0-5) this is closely followed by licensed child care program or center.

For those with school-age children only, there is a steeper “drop-off” after home-based settings, in preference for licensed program or center or no preference, followed by a program at a public school.

While some similarity was seen in patterns of child care setting across racial/ethnic groups, there were some slight variations, shown in Figure 16 following. For example, white families seem to have a much stronger preference for care in their own homes than do other groups, particularly when compared to Black families. Latino/a families and Black families seems to have a stronger preference for care in a family member or friends' home, and for care in a licensed child care program, than do other groups.

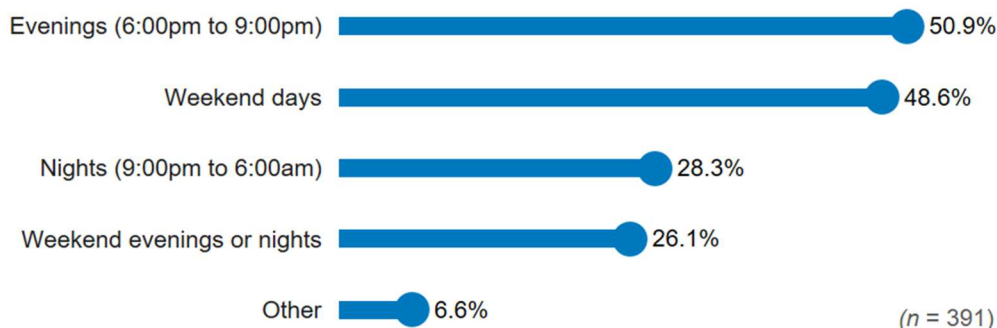
Additional breakouts for preferred setting are in Table B.48 of Appendix B.

Figure 16. Parent Survey: Preferred Child Care Setting by Race/Ethnicity of Respondent



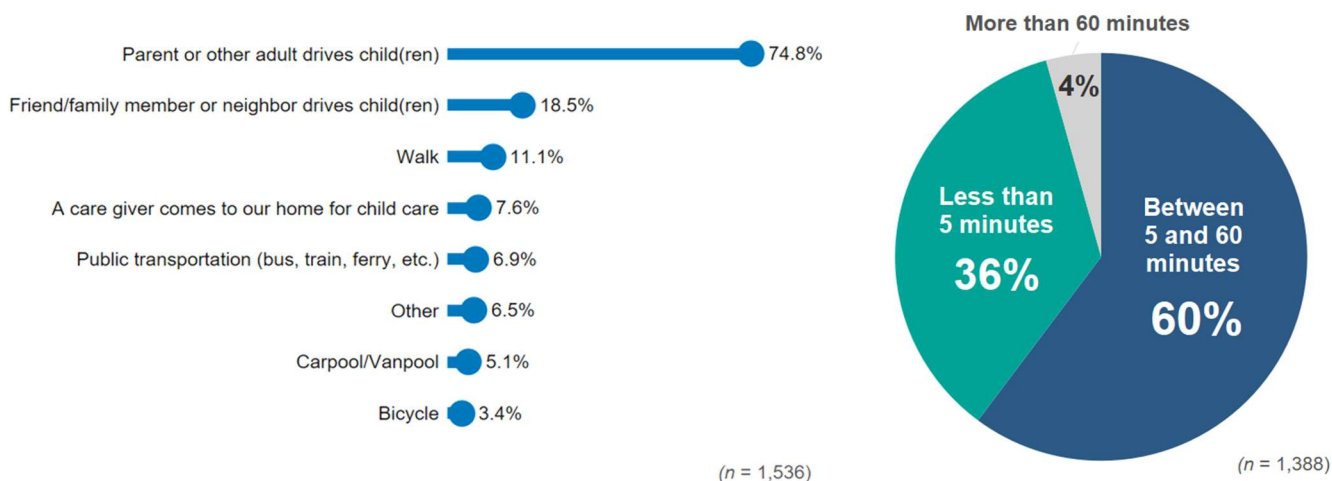
About a quarter (24.7%) of respondents reported needing child care outside of regular/traditional daytime hours (6:00 am – 6:00 pm Monday thru Friday). Figure 17 following shows that within this subset who need care in nontraditional hours, most commonly the need is in the evenings (51%) or weekend days (49%).

Figure 17. Parent Survey: Child Care Needed Outside Traditional Hours



Respondents were asked to approximate total daily transportation time - how many minutes it takes to transport their child(ren) to and from child care round trip each day. Over a third (36%) reported it takes them less than 5 minutes to transport their child(ren) to and from child care each day, 60% reported it takes between 5 and 60 minutes, and just 4% reported it takes them more than 60 minutes to transport their child(ren) to and from child care each day. Respondents also reported the mode of transportation their family uses to transport their child(ren) to and from child care, shown in Figure 18. Multiple modes could be selected.

Figure 18. Parent Survey: Mode and Drive Time of Transportation to Child Care

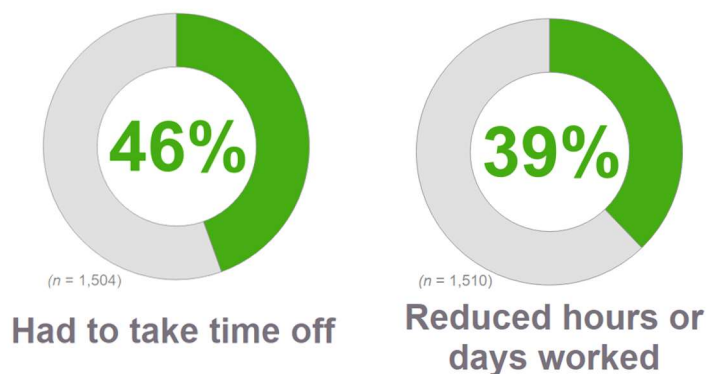


1.6 Employment Challenges and Barriers Related to Child Care

Parents were asked a series of questions to describe challenges and barriers, and how child care issues had impacted their work productivity and employment choices.

A little less than half (46%) of respondents reported that they or their spouse/partner had to take time off due to child care issues in the past 12 months (n=1,504). A little more than a third (39%) reported they had reduced the number of hours or days worked due to child care issues (n=1,510).

Figure 19. Parent Survey: Respondents' Employment Challenges Related to Child Care

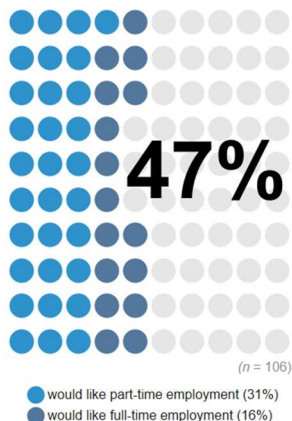


Breakouts are shown in Appendix B. A few patterns are of interest: Respondents more likely to need to take time off were:

- Those with all parents in household working (53.2%)
- Asian/Pacific Islander respondents (and least likely among Hispanic respondents)
- Those in urban areas
- Those with higher education and income levels

For parents not working, child care may be a barrier to returning to employment. The subset of parents who were unemployed as of the time of survey and **seeking employment**, were asked about whether child care issues were preventing them from obtaining employment. Note that this was a small group of respondents (n = 106). About half of these job-seekers (53%) reported that child care is not an issue preventing them from obtaining employment. However, another 31% of this group reported that they would like part-time employment but child care is an issue, and another 16% reported that they would like full-time employment but child care is an issue. In other words, combining these two groups, child care access is a barrier preventing about 47% of job-seekers from re-entering the workforce.

Figure 20. Parent Survey: Child Care Issues as a Barrier for Unemployed Respondents Seeking Employment



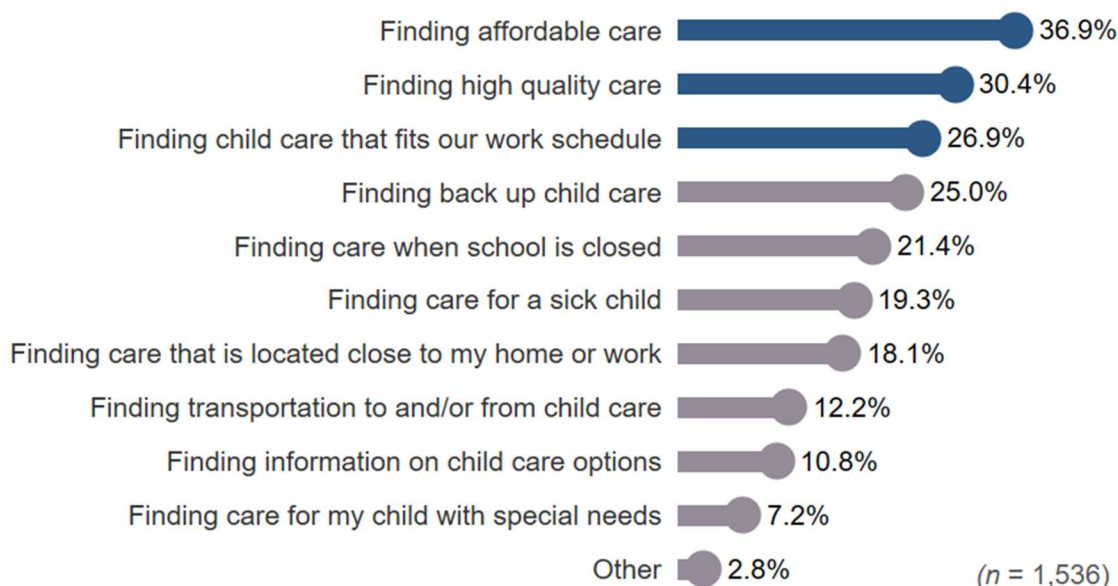
This was one of the few questions that could be examined by gender as it was not worded to household/family level. Just over half of women (51.4%) in this job-seeker group, compared with 41.4% of male job-seekers, reported child care as an issue for returning to part-time or full-time work. Other breakouts are shown in Appendix B, but all should be interpreted with caution due to the small size of this group.

Another potential negative impact was passing up a job offer or promotion due to child care issues. About 18.3% of respondents reported that in the past 12 months they have turned down a job offer or promotion due to child care issues. A few patterns were seen (Appendix B); this impact was:

- More likely among Black and American Indian/Alaska Native (AIAN) respondents
- Slightly more likely for rural respondents than those in urban areas
- Less likely for college vs. those with lower or higher education levels
- More likely for those with children age 0 through 4 (or mixed age group) vs those with only children ages 5-12
- No clear difference by gender of respondents

Respondents were asked if various child care issues had an effect on their family over the last year. Figure 21 shows that the three most common issues they reported as affecting their families were finding affordable care (36.9% of respondents) finding high quality care (30.4%), and finding child care that fits their schedule (26.9% of respondents).

Figure 21. Parent Survey: Child Care Issues Affecting Family

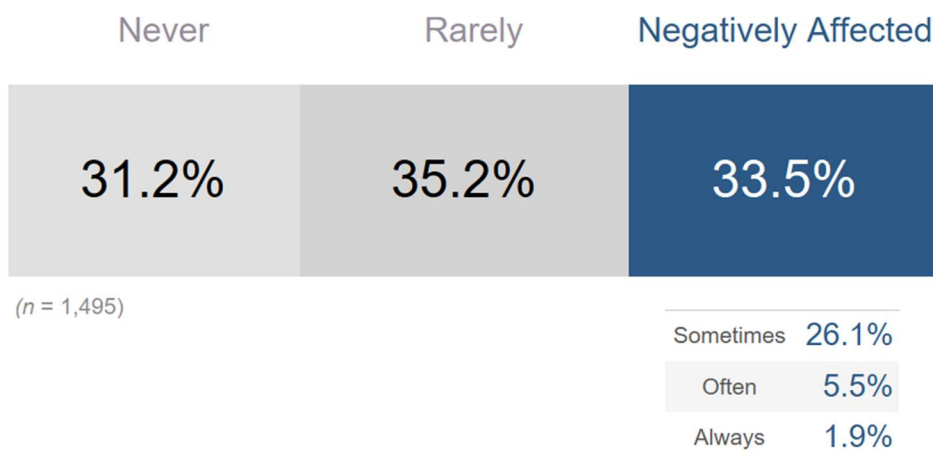


Breakouts are shown in Appendix B. For respondents in households where all parents are working, top three concerns were similar to those for all respondents. A few other trends of note:

- Finding affordable care is a higher-rated concern for those with children age 0 through 4 vs. those with children of mixed ages or those with school-age children.
- Similarly, finding child care that fits the parents' working schedule is of greater concern for parents with younger children (ages 0 through 4).
- Finding affordable care has a clear association with household income (it is a greater concern for those with lower income).
- Finding care that fits parents' work schedule is of greater concern for those with higher incomes.
- Additional breakouts show other trends of interest.

Respondents were asked how often their job is negatively affected by their child care arrangements. Nearly a third reported that their job is negatively affected by their child care arrangements. Just 31% of respondents reported their child care arrangements never negatively affect their job, and another 35% reported it to occur rarely. However, about a third (33.5%) reported that their job is negatively affected by their child care arrangements sometimes, often or always.

Figure 22. Parent Survey: Frequency of Child Care Issues Negatively Affecting Job



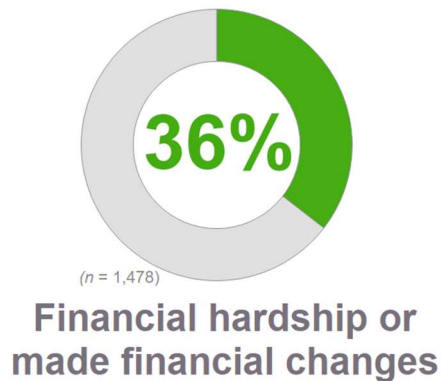
This question was asked of all respondents. However, looking at household employment status, negative job effects (sometimes, often or always) were reported at a higher rate (37%) of households where all parents are working.

In addition, shown in Appendix B, negative job impacts were more often reported:

- By Non-Hispanic Black parents, (and least often by white parents),
- By single working parents and 2-working parent households,
- By those with a graduate education vs. lower educational levels,
- By those with a high income level (\$200,000 or greater); least often by those making \$40,000 to 59,999, and
- By those with children in the age 0 through 4 or the 0 through 4 plus 5 through 12 age groups vs. those with children age 5 through 2 only.

Over a third (36%) of respondents reported their household had experienced financial hardship or had made financial changes as a result of the cost of child care.

Figure 23. Parent Survey: Financial Hardship Due to Child Care Costs



Breakouts are shown in Appendix B. A few trends are apparent:

- In comparing group differences by race/ethnicity, Hispanic respondents were least likely to experience financial hardship due to child care costs, while Non-Hispanic Black and Non-Hispanic American Indian/Alaska Native (AIAN) respondents were most likely.
- By income, the group with \$40,000 to 59,999 income were most likely to experience financial hardship compared with other income groups (both lower and higher income).
- Single working parents were more likely to report financial hardship vs. other working parent groups (2 parents with both working, 2 parents with 1 working).
- Those in an urban area were more likely than those in a rural area to experience financial hardship.
- By age group, those with children only in the 0 through 4 age group were more likely to experience financial hardship than were those with children of both age groups, and those with only children age 5 through 12.

1.7 Summary

To summarize a few key findings on the needs, impacts or challenges in child care:

Child Care Arrangements

- For all child age groups, among multiple possible care arrangements, the most common non-parental care arrangement for all age groups was staying with another family member.
- For children ages 0 through 4, the next most common non-parental arrangements among all used were licensed child care center, other program/activity, or other preschool program.
- For children ages 5-9, the next most common non-parental arrangements were licensed child care center, other preschool program, or other program/activity.

For children ages 10 through 12, the next most common non-parental arrangements among all used were program/activity, before- or after-school program, staying home alone, or staying with another family member. The most common primary non-parental care arrangement varied by age group of child:

- Among children ages 0 through 4, the most common non-parental primary care arrangement was staying with another family member (50% of children), followed by licensed child care center (18%).
- For children age 5 through 9, the most common non-parental primary arrangement was another family member (34%) followed by licensed child care center (22% and then other preschool program (16%).
- For older children ages 10 through 12, stay with another family member was most common (42%) followed by another type of program or activity (13%) and before- or after-school program (13%).

When reviewing how many arrangements were used, overall, 29% of children were not using any care other than that of a parent/step-parent or guardian, and another 31% were in only one non-parental care arrangement. However, it is common for children to be in multiple care arrangements.

- A fifth of children (20%) experienced two non-parental arrangements, and 20% of children were in three or more arrangements.
- Children age 0 through 4 were far more likely to be in no (zero) non-parental care arrangements than were older children.
- Older children (age 10 through 12) were more likely to be in three or more arrangements than were younger children.

Parents' concerns and unmet needs in accessing care

- Of various potential child care-related concerns affecting their families, the three most common issues reported were finding affordable care (36.9% of respondents), finding high quality care (30.4%), and finding child care that fits their schedule (26.9% of respondents).
- About a quarter of parents said they need child care outside traditional working hours, most commonly weekend evening and weekdays.
- Over a third of respondents (38.5%) reported receiving some kind of financial assistance paying for child care from one or more sources.
- Just over a third (36%) of respondents reported their household had experienced financial hardship or had made financial changes as a result of the cost of child care. Groups most likely to experience financial hardship are Non-Hispanic Black and American Indian/Alaska Native (AIAN) parents, those with moderately low income, those in single working parent households, and those with children age 0 through 4.

Effects on employment

- About a third of respondents said their job is sometimes, often or always negatively affected by issues with their child care arrangement.
- A little less than half (46%) of respondents reported that they or their spouse/partner had to take time off due to child care issues in the past 12 months. A little more than a third

(39%) reported they had reduced the number of hours or days worked due to child care issues.

- Nearly one in five respondents reported that in the past year they have turned down a job offer or promotion due to child care issues.
- Looking at the impact on the small subset of **unemployed respondents who were seeking employment**, about 31% of this group reported that they would like part-time employment but child care is an issue, and another 16% reported that they would like full-time employment but child care is an issue. In other words, when combining these two groups it appears that child care access is a barrier possibly preventing about 47% of job-seekers from re-entering the workforce.

Some of the findings of the Parent Survey were incorporated as assumptions into the Economic Impact Model described in Section VII of this report; detail is provided in that section.

2. Parent Engagement Sessions

2.1 Parent Engagement Overview/Methods

The parent engagement sessions were designed to elicit rich stories and personal reflections from individual parents and families living in vulnerable communities and those who are often underrepresented in traditional survey research: Families of color, low-income families, undocumented families experiencing additional barriers to accessing child care such as language access, children with special needs, children in foster care system, swing shift hours at work, living in rural areas, and families experiencing homelessness. For this effort, ICF partnered with MomsRising of Washington State to conduct a series of in-person and telephone interviews between March 17 and April 3, 2020.

All sessions followed a semi-structured question guide (see Appendix B); sessions were conducted by teams of two (one facilitator and one note-taker). Session facilitators were members of the MomsRising outreach staff and statewide MomsRising Policy Fellows). Twenty-four sessions were conducted solely in English, three sessions were in Spanish, and one was bilingual (participant used Spanish and English interchangeably responding to questions). All facilitators were trained on data protection procedures and confidentiality. Participants received a \$50 gift card per household for their participation. All comments were kept anonymous and confidential. Transcribed comments were reviewed and summarized by theme. A summary and illustrative quotes are provided below.

It is very important to keep in mind when reviewing the findings below that the approach and populations for the survey and engagement sessions were very different by design. The intent of the engagement sessions was to draw out rich detail of parents' experiences rather than to directly compare to the quantitative findings of the survey. Findings described below in use of care and preferences should not be compared to the survey findings, and any differences between the two efforts should not be considered evidence of greater or less validity of one set of findings over another.

2.2 Participants and Communities

A total of 28 families/households participated in discussions to provide their stories of child care related concerns and challenges. The MomsRising team gathered the perspectives of a diverse cross-section of Washington state families for this effort. The following family characteristics are represented among the session participants:

- Geography: Families living in various Washington rural and urban locations including Outlook, Shelton, LaConner, Lake Stevens, Kent, Tacoma, Seattle, Oak Harbor, Vancouver, Issaquah, Centralia, Spokane and South King County.
- Race and Ethnicity: White or Caucasian, Hispanic or Latino/a, Black or African American, Asian or Pacific Islander, American Indian or Alaska Native
- Primary Language Spoken by Household: English, Spanish, Somali, Chinese
- Caregiver professions: Paralegal, Seasonal farm worker, family support worker, Human Resources professional, city employee, part-time worker, municipal government worker, family support worker, paramedic, social worker, ECEAP staff, store manager, unemployed, and stay-at-home parent.

- Family structure: Two-parent families, single-parent households, foster families
- Other significant family/household characteristics: Kinship caregivers, LGBTQ families, veteran families, parents of children with special needs, families experiencing homelessness, low-income and middle-class families, student parents.

Demographic details are shown in following tables.

Table 5. Parent Engagement Sessions: Primary Language of Households

Language (n=29)	
English	58.6%
Spanish	13.8%
Somali	10.3%
Cantonese	6.9%
Other	10.3%

The majority of households (58.6%) identified English as their primary language, followed by Spanish at 13.8%, Somali at 10.8%, Cantonese 6.9% and the remaining 10.3% as other languages. The race/ethnicity of respondents was varied, with largest single group of respondents identifying as white/Caucasian (36%), followed by Black or African American (24%), Hispanic/Latino (24%) and Asian or Pacific Islander (24%).

Table 6. Parent Engagement Sessions: Household Demographics

Race/Ethnicity (n=25)	
White or Caucasian	36%
Black or African American	24%
Hispanic/Latino	24%
Asian or Pacific Islander	12%
Other	4%

The participating households reported on various family configurations based on household occupants, the number of children within the household, and the age of the children. Respondents ranged from households of zero children (respondent was an expectant mother who discussed her future child care plans) to households with four children. Overall, most participating households reported having two children, with a mean of 2.3 children per household. Respondents also reported the ages of the children within their household. Many of the households interviewed (45.2%) reported having at least one child between 6–12 years old, followed by 33.4% of households who reported having at least one preschool-aged child.

Table 7. Parent Engagement Sessions: Child Ages

Age of Children (n=42)	
Infant/Toddler (0–2 years old)	21.4%
Preschooler (3–5 years old)	33.4%
School-Age (6–12 years old)	45.2%

Families also reported on the hours which they require child care based on their work or school schedules. Of the families that were working at the time of the interview, a little less than half (46.4%) of the households reported needing full-time child care, categorized by at least 40 hours per week. The remaining families described varying needs for child care ranging from 16 – 36 hours per week.

Respondents described their current child care by indicating who cares for the children within the household during the day and who cares for them in the evening/weekend. It is important to note that descriptions of types of care used are reported here for understanding the experiences and choices of the parents interviewed. These findings were not used to estimate the frequency of care used in the general state population, and should not be compared directly to the results of the statewide parent survey as they were not gathered by the same methods.

Overall, respondents' child care arrangements varied from a single type of child care to a collection of various types of care used concurrently. Most frequently, respondents described that at least one of the types of child care they were using was a form of Friends, Family & Neighbor (FFN) care. The most common type of FFN care described was the use of another family member to provide care. Participants noted grandparents, aunts, and older siblings (over the age of 12) as caregivers for their children while the primary caregiver was working. For most of these households, this was the only type of care used. Another form of FFN care that households reported using was an unregulated caregiver outside of the house, such as a neighbor or friend. Unlike the use of family members for care, many households noted that the unregulated caregiver was used in conjunction with other types of care. Note that the participants did not specify whether their family member caregiver or other home-based caregiver was licensed, so the category "other home-based caregiver outside child's home" could include both informal and licensed family home.

Table 8. Parent Engagement Sessions: Type(s) of Care Currently Used

Types of Care (n=43)	
In-Home and Home-based Care	
Stay home with parent, step-parent or guardian	18.6%
Stay with another family member	27.9%
Other home-based caregiver outside child's home (including neighbor, friend or licensed family home)*	18.6%
Regulated Care	
Go to a licensed child care center	9.3%
Go to a Head Start, ECEAP, or Seattle public preschool program	14.0%
Go to another preschool program	2.3%
Go to a before or after-school program	7.0%
Go to another type of program or activity, such as a library, sports/athletic program or club	2.3%

**Respondents using a home-based arrangement generally did not specify whether their home-based caregiver was a licensed family home or not, therefore they were all reported in a single category as other home-based caregiver.*

Generally, the interviewed households tended to use center- or school-based settings care less frequently than home based settings care. Note that those interviewed did not generally specify whether their home-based caregiver was licensed, and this was not captured in session notes. The most common type of formal child care households reported using at the time was Head Start, ECEAP, or a Seattle public preschool. Other common types of care mentioned by households were the use of a licensed child care center and a before- or after-school program. Similar to FFN care, many of the households who reported using these types of formal care used them jointly with other types of care. To summarize, when respondents were relying on grandparents, aunts, and older siblings for child care, these tended to be the sole non-parental care arrangement; however, families relying on non-relative providers, or regulated care (centers or preschools) tended to make use of multiple child care arrangements.

As mentioned earlier, these findings should not be compared to the findings of the parent survey – they are only applicable to the select group recruited for the parent engagement sessions. These findings do not contradict the statewide parent survey, which is more representative of the state population as a whole.

2.3 Child Care Needs and Preferences

When asked how they began their search for information about child care, participants described a variety of processes. While some participants found information via word of mouth (e.g., asking friends, people at work, etc.), others contacted resource organizations (e.g., Child Care Aware, Department of Social and Health Services (DSHS), YWCA, Refugee Women's Alliance (ReWA), or searched online. Some participants used a combination of all three methods. Others did not conduct searches because they already decided on a certain type of care, typically FFN care. Participants typically searched for information related to openings,

availability, and cost, as well as for child care programs that were close by their homes or conveniently located.

Participants who found information via word of mouth through friends, work, or other known contacts. Using the information provided to them, some participants continued their search online or over the phone. Typically, these participants found the information they were looking for and felt they could trust the information others provided them. One participant who was a person of color, however, explained that searching for child care information through friends had limitations since their friends were only aware of care that primarily served their cultural community.

Participants who contacted organizations to find child care information generally said they had found what they needed. One participant contacted Child Care Aware (CCA) who provided them with a list of child care centers and their ratings. Another participant used CCA but found the process frustrating. One participant contacted the YWCA and was satisfied with the information they received. Lastly, one participant referenced using STARS (State Training and Registry System) and MERIT (Managed Education and Registry Information Tool) to verify licensure status of child care programs.

Regarding challenges finding information, some participants reported that finding programs with openings was difficult or availability was not made clear upfront. One participant toured a child care center only to find out that there was no current opening. Another participant described the challenge of not knowing where they were on a waiting list for at-home/neighborhood centers, which did not have the resources to have a website or ways to report their availability. Other participants reported that it was difficult to find programs they could afford or that finding the cost of a program was difficult. Other participants stated that the online information they could access was not detailed enough (e.g., missing information about meals offered, how many children are served) or was not up to date.

In addition, respondents described challenges finding specific services in child care. One participant was looking for information on mental health services but could not find it. This participant described:

- “I would look for a place that would take my son that has mental health issues that would show up in his behavior. The child care would say yes, we can handle him, only to have them say in about 2 weeks to a month that this isn’t a good fit. Then I would have to find another place that would take my child.” –*Parent of two children with one child in child care*

Another participant had significant difficulty finding child care centers that could attend to their son’s developmental delays, but eventually found care. In discussing the ability to access translated information/materials, some participants expressed that they did not need translated materials while others could not find information in their primary language (e.g., Spanish), which affected their ability to access information.

For participants who ultimately chose FFN care, several stated that they felt safe knowing that their child was being cared for by someone that they knew, trusted, and whose values aligned with their own. Participants also reported that FFN care was more cost effective. One participant whose oldest son looks after the younger children, reported that she and her children rely on each other. Another participant mentioned that their only option was to find child care with friends due to their legal status:

- “The only option I had was to find child care with friends. I couldn’t find information in Spanish. The legal status challenge makes it harder to look for and find information. I knew I didn’t automatically qualify for programs... If I had legal residency I would have loved to find a child care center for my kids.” –*Parent of three children with one child in care*

When asked what great child care looks like for them and their family, many participants cited the importance of flexible hours, affordability, and licensed care. Programs that taught developmental and school readiness skills (e.g., alphabet, shapes, and numbers) and encouraged creativity and social skills were important as well. Participants also described the importance of a safe environment and staff who are highly qualified and trained, diverse, nurturing, attentive, and genuinely enjoy being with children.

When asked what they liked the most about their current child care situation, participants who used a form of FFN care cited being able to save money, that it is reliable and trustworthy, and that their children are taught the way they want them to be (e.g., cultural values). Participants who are the primary caregivers during the day and/or weekends enjoyed being able to have a lot of quality time with their children and knowing that they are safe in their own care.

Lastly, participants who used some form of formal care described what they liked about their child care arrangement. They mentioned factors such as ease of access, inexpensive fees (noted by those receiving subsidy through Working Connections Child Care), integration of different cultures and backgrounds into the program, parent-teacher communication, and adequate teacher:child ratios.

- One participant, whose son has significant development delays, appreciated that the staff are patient with him and communicate with her, asking what more they can do for him.
- One participant, who is herself a teacher for infants to 3-year-olds at an Early Head Start and whose own child attends an ECEAP program, stated that she has known the ECEAP staff for years and trusts them.
- Another participant, who uses an ECEAP program, said that its location and hours are convenient in relation to her work.

Overall, participants expressed a wish for child care that is affordable, trustworthy, and flexible. While many participants were able to find the child care information they needed, some struggled with finding programs that had availability or catered to their child’s specialized needs. Participants value child care that is safe, helps their child grow developmentally and socially, and respects their cultural values and backgrounds.

2.4 Barriers Related to Child Care

2.4.1 Barriers related to cost and subsidy

The most commonly mentioned barrier or challenge in finding child care was cost. Across racial and ethnic groups, only a handful of parents said that cost did *not* have a significant bearing on their child care decision-making, while several respondents indicated that it was the deciding factor. Some parents found that cost limited their options, but did not prevent them from finding care—for example, they were only able to choose among providers that accept state funding, do not charge over a certain rate, or have subsidized transportation. One parent stated that the voucher system for which she qualifies doesn’t cover the cost for center-based care, so she

must rely on family and friends for care. On the other hand, several participants chose to stop working because they found that the cost of child care during their working hours was so high that it was not worthwhile or feasible.

- “I’m not able to afford the child care places that would be a good fit for me, therefore I had to use one that was within my budget.” – *Parent of one school age child and one adult child*
- “I didn’t like that what I earned; I would end up with little left over. I had to leave my kids for long hours so about half my paycheck would go to the caretaker... I didn’t see the point to working at this part-time [job] anymore. I did the math and the money that was going to my commute and the caretaker was not worth it, when I could just take care of them myself and not overpay or pay the caretaker.” – *Parent of three children ages 7 to 19, Hispanic/Latino*
- “We’ve gotta find some kind of happy medium here, to where we’re not paying everything we make in child care. Basically, we would be paying for child care and rent, and we’d be lucky to have anything else, and people can’t live that way!” – *Parent of one, white*
- “It gives me anxiety because I am uncertain if I will be able to pay month by month.” – *Parent of two who stopped working because she could not afford child care.*
- “I take care of my sister’s children and she takes care of mine...This has a big impact on my finances. I can’t afford child care and this is why I have made the choices I have” – *Parent of four children ages 7 through 18. Her relatives or her oldest children care for her younger children while she is working.*

Several participants noted the particular expense/difficulty of finding affordable infant care, as compared with care for preschool-age children.

- “After a certain age when you adopt a child the “Working Connections” stopped. They send a maintenance check when adoption goes through. After adoption you’re on our own and it was shocking to learn what I had to pay. Infant stage was the hardest with the cost of diapers and formula. Right now, I’m paying \$200 for before and after school care. In the summer for full-time it is about \$600.” – *Single Parent of two, Black/African American*
- “Affordability, flexibility. I would like to have the option to not pay over breaks. I’m a teacher and I’d like to be able to take him out in the summer and not have to pay. As an infant they make you go the whole year.” – *Parent of one infant, white*

Some parents did express satisfaction with the cost of their care: typically, parents who were receiving free or subsidized care (or in one case, had already decided to use primarily FFN care). In general, most participants enrolled in preschool, ECEAP, or Head Start were satisfied with the cost.

- “I think it’s great—because the state pays for it. I’m in a situation where the state pays for it. I’ve heard from co-workers that when they’re paying for themselves, it’s outrageous.” – *Black/African American parent with two biological children in high school and two grade-school age Native American foster children*

- “We actually don’t pay for ECEAP, it’s a government funded program, so that I love, and that’s the only way we’d be able to have her in preschool. We can’t afford it otherwise.” – *Parent of one, white*

Two parents who were paying out of pocket seemed mostly comfortable with the price, yet even those parents expressed reservations.

- “It seems expensive. But then you compare what you would pay if you paid someone to come to your house, and it seems like a good deal. Wish there was flexibility with payment plans.” – *Parent of two children ages 4 and 9, white*

Respondents were also asked about their experiences and challenges with subsidies and subsidized care. Several parents responded that they do not qualify for assistance or that they receive assistance but have not encountered any issues. Two respondents were unsure if they were qualified to receive subsidies, in one case because they and their partner were DACA recipients. Some of the parents who do not receive subsidies had no further comment about these programs, while others said they wished more subsidies or scholarships were available. A few parents noted that they have qualified for subsidy but not consistently, highlighting how challenging it can be for those who are close to the income threshold:

- “I don’t get any [subsidy]. I did when I was on maternity leave, but [now] I make about \$150 too much. Even though it’s just me; I don’t get child care support. Even when I was receiving assistance, I was still paying a \$550 copay each month.” – *Parent of two children, ages 4 and 6, white*
- “Before, like I said, my fiancé made something like \$50 too much. Now we probably could [receive assistance], since he lost his job (related to COVID), but we’re still kind of figuring things out.” – *Parent of one 5-year-old child, white*
- “Yes, I’ve used these benefits; it was complicated because as a seasonal worker they would only help me a certain time and then they would take away all benefits, food stamps and child care. I stopped because it was not enough to pay the person that was watching my kids when I was using the program. It would be easier if they checked people’s hours and not decide if they are eligible one month and the next month they are not. They need to look at every person’s situation and child care systems need to be fair with their income. For example, parents that are still going to school.” – *Parent of two children ages 6 and 8, Hispanic/Latino; currently not working because the cost of care*

Other parents related challenges with using subsidized child care vouchers. In particular, parents expressed frustration that you must currently be working to get a voucher, the vouchers may not be sufficient to cover certain programs and providers may prefer clients who can pay out of pocket. One participant noted that in the past, she had experienced difficulty or delays related to voucher paperwork and had not received the subsidy on time.

- “Yes, some child care providers do not want to take the vouchers because they don’t pay very much. It was even harder to get someone to take your voucher if you had a child that needed additional care, or one on one with the teacher.” – *parent of a 10-year-old*
- “Filling out the paperwork on time every year is stressful. [My] mom had to have training and get a tablet for reporting. The state helps you, but it’s limited. If I didn’t have my

mom, I'd worry about finding an opening at a center that accepts state funding" – *Parent of two children ages 7 and 11; white/Caucasian*

- "I could qualify for vouchers, but this system of assistance is stupid. You have to get a job first before you can get assistance. And when you get a voucher, there are waiting lists everywhere." – *Parent of two children ages 4 and 9; Asian/Pacific Islander*

2.4.2 Other Barriers

Outside of cost, participants mentioned several challenges related to center-based care and care in child care homes. These challenges included difficulty finding an open slot, finding a center close to home, scheduling, and finding specialized types of care. Parents who used informal care often reported that a combination of cost and these other factors prohibited them from utilizing care. In addition, parents who rely primarily on informal (family-friend-neighbor) care were sometimes left without a back-up option when their normal caregiver was busy. These cases are examined further in a later section (2.5 Employment Challenges/Impact).

A number of parents mentioned that they had difficulty finding a formal child care arrangement (center or licensed family home) that could accommodate the hours they needed for work or school. In particular, parents found it hard to find care that was open in the evening or on weekends. Some parents remarked that they needed a back-up option for when their normal center or school was closed and they still needed to work (i.e., hourly as-needed care). These types of challenges were voiced by parents across multiple racial/ethnic groups. In conjunction with opening hours, a few parents indicated that they would prefer a care center to be located closer to their home. Some parents felt they had to plan their work schedule around getting to child care on time or had to rush to get from work to the center before close. For other parents, the mismatch between their working hours and the available care was more than a frustration, and prohibited them from finding child care. Besides cost, scheduling was one of the most commonly cited reasons that parents were not able to find care.

- "Days when schools are closed and child cares are closed and I have to work, I have to call in. I also can't go back to school to finish—I don't have child care on the weekends, so I couldn't take like a weekend class to finish my degree. And trying to do online is awful when you have a 4 year old and a 6 year old. I tried it 6 months ago and I barely scraped by—I'm not doing that again to myself or my kids." – *Parent of two children, ages 4 and 6, white*
- "I work nights and weekends, and there really is no option for me." – *Mother of four children ages 7 to 17, whose children mostly stay home alone.*

Parents of children with disabilities had unique difficulty finding formal care. All respondents who have children with special needs had experienced difficulty finding someone who could care for their child. Some switched to informal care because they were unable to find a formal care provider who could handle their children's medical complexities. One parent said she had already had to switch care centers multiple times because of her child's behavioral issues:

- "The child care would say yes, we can handle him, only to have them say in about 2 weeks to a month that this isn't a good fit. Then I would have to find another place that would take my child." – *Parent of a 10-year-old*
- "There are not a lot of ... child care settings that can care for a child with special needs. I have a child with special needs, and it was very hard to find a program that would take

him” – *Black/African American parent of three children 2 through 10 years old, who cares for her children with FFN help*

Even for those parents who were able to identify a child care setting that would meet their needs, several referenced difficulties finding open slots in formal child care settings. Some participants said that they were lucky to secure a spot early due to selection priority (e.g. students who had been to Early Head Start were prioritized for Head Start; former foster children also received priority registration at some centers). A few respondents mentioned waiting on a waitlist for several months without being notified, or said that the number of open slots in licensed care centers and care homes seemed too limited. One parent reported that in order to sign her children up for after-school programs, she needed to wait in line for a long time and she had never been able to get there early enough to get her children a slot.

- “Outside of the military families, there are almost no infant slots available in my community. Not enough child care facilities for younger kids.” – *Mother of two children, ages 7 and 11, white*
- “The waitlists are challenging. With neighborhood or at-home centers, they’re small businesses, so they don’t have fancy websites or administrators to track things. So, we weren’t sure what was happening or where we were on the list. It requires a lot of trust. Having relationships with people is important because everyone is on multiple waitlists and parents aren’t going to follow up with each one. We feel anxious, though, like we need a backup option.... It seems like overall there’s a shortage of child care. I don’t know if that’s true or not, but based on everyone having a long waitlist. ... also, because of this scarcity that exists, it creates a lot of pressure both on families and child care providers, with the creation of these kind of artificial waitlists. I think it’s also an uncertainty for their businesses, of how many spots do I have filled, really.” – *Expecting parent, white*

Some respondents said they had difficulty finding care because they just didn’t know where to look or had trouble identifying child care options. While these barriers were less commonly mentioned, they were present across all racial/ethnic groups. A few parents mentioned that they had additional trouble finding centers because they were new to town and didn’t have the connections:

- “I think also just finding what child care providers are available in our area is challenging. Having a central source of information—there are a few that have come up that are more helpful, there’s like an app as well, but I think in-home care has a lot of barriers to making themselves more advertised, it’s really still more word of mouth.” – *Expecting parent, white*
- “First of all, we were new to town and didn’t know of any resources. I applied for my kid to be in programs at school, but it took a long time. I could not qualify for state programs because of my legal status. ...The only option I had was to find child care with friends. I couldn’t find information in Spanish. The legal status challenge makes it harder to look for and find information. I knew I didn’t automatically qualify for programs....Not having documents (legal status) is the main obstacle, [but also] not being able to find a certified [child] care, being new to the town and not knowing anyone at first.” – *Parent of three children ages 7 to 19, Hispanic/Latino*

Two parents mentioned that they would prefer to have their child enrolled in dual-language immersion but were not able to find an affordable center with an opening. However, other parents who listed dual-language or cultural fit as important to them said that they were able to find a center that fit their linguistic and cultural preferences.

Finally, a handful of parents reported that they wished they could have found or afforded a higher quality care center or a care center with more enrichment opportunities. Examples of desired activities included field trips, more outdoor play, and more educational content.

No parents reported being aware of any services that they qualify for but prefer not to participate in.

2.5 Employment Challenges/Impact

Many participants reported that finding sufficient child care presented a challenge, and that lack of care had interfered with their work or education arrangements. Several parents reported that they had chosen to stay home with their children, but they would have preferred to have a job or to work more hours. Some parents shared that they were not able to work at all while their children were young for preschool, but once their children reached school age they were able to go back to work:

- “I didn't work for 9 years because I would have been working just to pay for child care. They were in ECEAP as 4-year-olds, but it is only a half day which isn't enough to seek employment. Now that they are both school age I work. Two kids' care costs more than rent! ... So, to me, it's not worth it to work if you're just paying for child care alone—it leads to a circle of poverty... If care was affordable, I definitely would have worked through my kids' younger years.” – *Parent of two children ages 7 and 11; white/Caucasian; military family*
- One woman receiving subsidy for child care reported, “I couldn't do it. If I had to pay for it myself, I think that I probably wouldn't be able to swing it—I would just be working to pay for child care, I wouldn't be able to work.” – *Black/African American parent with two biological children in high school and two grade-school age Native American foster children*

One parent reported that she and her spouse had attempted to open a business, but were forced to close because of insufficient child care:

- “When my second one was 2, we tried to open a business. We wanted to find a [child care]. We went to [a bilingual early learning center]. I asked them. But they didn't give me information at all. They just told me “it's full. Leave your phone number, and I'll call you.” I said OK, but I never heard from them again. They said they have a very long waiting list, almost 6 months to a year. If I really wanted child care right away, I can't find anything. Turns out, when I opened my restaurant I had to bring my kid with me 24 hours because nobody is going to take care of my baby. After a few months, I still couldn't find a [child] care, 9-9 for restaurant hours, no one has hours like that. So, I brought my baby to San Francisco where my family is, I sent my little one to San Francisco for 6 months. After that, we just couldn't stand it anymore, we felt like we were losing our daughter, so we lost a lot of money, but we gave up our business and I gave up working.” – *Parent of two children ages 4 and 9; Asian/Pacific Islander*

Several parents indicated that the hours of operation at most centers are not sufficient to cover all of their working time, or that they have had to switch jobs or leave the paid workforce because their work schedule was not compatible with center hours. One expectant mother discussed how she expects the limited hours at child care centers to affect her career.

- “We both work nine-hour shifts, generally, and have commutes. The child care hours, especially in in-home centers, are more limited. So figuring out how we both need to adjust our work schedules has definitely been a stressor, and especially for me, thinking what my job function looks like now, and what it will need to look like when I go back to work. Like I can’t have the 6 am meetings that I’m used to having now. It really impacts our commute, for sure, our commute options and whether we can be part of a vanpool or not. And definitely what my career progression looks like.” – *Expectant mother; white/Caucasian*
- “But for child care centers, have hours for parents that work different hours or work shifts! I don’t have that problem right now but if I did that would be what I’d change because I know other families face this problem.” – *Parent of two children ages 7 and 11; white/Caucasian, currently using FFN care*
- “When I was working, my schedule changed every week. It was difficult to find a program with the flexibility I needed.” – *Stay at home parent of three children ages 5 mo. to 8 years, Black/African American*
- “I didn’t like that what I earned I would end up with little left over. I had to leave my kids for long hours so about half my paycheck would go to the caretaker. So, I spoke to my husband about changing this situation. I didn’t see the point to working at this part-time anymore. I did the math and the money that was going to my commute and the caretaker was not worth it when I could just take care of them myself and not overpay or pay the caretaker.” – *Stay at home parent of three children age 7 to 19 years, who occasionally sells prepared foods; Hispanic/Latino*

2.5.1 Use of Family Caregivers, Informal and Home-Based Care

Parents who said their current care was sufficient to support their work schedule were typically those who relied on a family member who could watch their child whenever needed. (The exceptions were two parents who had flexible work schedules; one parent, who remarked that she was always on time for child care pick-up and drop-off, also noted that working from home made it easier to balance work and parenting.) As noted earlier, parents receiving care from a home-based caregiver other than a family member did not typically specify in sessions whether they were using a licensed family home or other home-based care setting. This is a limitation in trying to compare these stories to prevalence in using the categories of care as defined in the survey.

Several participants relied on a relative (typically the child’s grandparent or aunt) as their primary source of care. These parents generally expressed gratitude that they had not had to search for formal care, but also apprehension about how they would cope if that caregiver stopped being available. For some, that was more than just a hypothetical possibility: some participants had already missed work or school on multiple occasions because their primary FFN caretaker was unavailable, and they had no back-up care.

- “It affects me a lot when my mom can’t take care of my children and I have to stay home from work. It affects my earnings since I am the head of the family and the breadwinner.” – *Parent of four children ages 2 to 13, Hispanic/Latino*
- “I was able to plan my work schedule ahead of time and communicate it with my sister who is flexible in caring for my children” – *Parent of three children ages 1 week to 4 years, Black/African American*
- “I started looking for child care when I started going to college... I looked for my family’s support. When my mom started going back to work, I had to miss class because I couldn’t leave [my child] with my mom or sister.” – *Parent of one child age 5 mo., Hispanic/Latino*
- “Since my sister watches my kids, I’m able to work full time. But I know she would want a job if she could have time to work, too.” – *Parent of three children ages 5 to 10 years, Asian/Pacific Islander*

2.5.2 Use of Formal Care

Parents who primarily used formal licensed care such as a preschool or licensed care home faced difficulties when their children were sick. Some parents found that their child care center had a strict policy regarding when students must be sent home due to illness. Parents had also faced career consequences from needing to pick up their child for medical reasons, ranging from the intangible (perceived reputational harm), to concrete loss of wages.

- “It affected me a lot because my daughter was a premature baby and child care providers would call for any little thing that my daughter did. I missed a lot of days of work when my kids would get sick. They call you to pick up your kids and still receive full pay of the day.” – *Parent of two children ages 6 and 8, Hispanic/Latino; currently not working because the cost of care*
- “On the one hand [child care has] made it so I can work, but anything that goes wrong I’m the person that’s leaving to go deal with it. The policies are hard – this place is more lenient with coughs, etc. In other situations, the rules with runny noses and coughs have wasted all my sick time. I couldn’t do my job without child care.” – *Parent of two children ages 3 and 7, white/Caucasian*
- “Work has been understanding using sick leave to take my son to appointments. But I feel like they still look at me weird, I’ve been using a lot of sick leave for my son. My job has a way of making me feel guilty for taking this time off. I only have these notes just in case they ask me for them. Comments that have been made makes me want to have proof to take precaution” – *Parent of one child age 9, Black/African American; one child has developmental delays and ADHD*
- “It definitely disrupts the efficiency of my work. But because my current position is very flexible, I am able to take my son to his appointments during the day. If I didn’t have work flexibility, child care would be very difficult.” – *Parent of two children ages 4 and 9, white/Caucasian; one child has developmental delays and ADHD*

While children getting sick causes stress for most parents, the challenge is even greater for those whose children have disabilities or on-going medical issues. One parent who has four children, two with disabilities, said she is unable to work at all given the difficulty of finding care that is both affordable and able to handle her children’s medical complexities.

No clear pattern emerged based on number or age of children or parents' race or ethnicity.

2.6 Greatest Challenges

To conclude the interviews, participants were asked what they thought was the biggest challenge finding child care that met their needs. Their responses generally echoed the themes discussed above. The most frequently cited "biggest challenge" was cost and affordability (13 mentions). Four participants described their concerns as below:

- "Definitely the cost and availability. I'm definitely seeing the struggle—talking with families, and even my own ECEAP families—I'm working right now with the Island County health department—they're coming to talk to our families because we know families who have horror stories with in-home care and dangerous situations (walking in on a caretaker sleeping when they're supposed to be caring for their children). It's so scary that they can't work if they don't have child care, so they have to take what they can get, and sometimes that's just terrifying." – *Parent of two children, ECEAP employee*
- "Most child care providers are working with vouchers. But people who can't get vouchers don't have access to ANY affordable care. If you can't apply for a voucher, your whole salary has to go to child care." – *Parent of color raising two children, using FFN care*
- "We can't afford child care, and it doesn't seem fair. Some families qualify for low-income programs and we do not. But child care still isn't affordable for us." – *Parent of three children, using informal relative care (not receiving subsidy)*
- "Overall, I think the cost, honestly. It's just so exorbitant, and it's like, we're not poor-poor, but we're also not Bill Gates, so we've got to find some kind of happy medium here, to where we're not paying everything we make in child care. Basically, we would be paying for child care and rent, and we'd be lucky to have anything else, and people can't live that way! We're working to live, not living to work. For our family, it's really about how do we make things work before losing everything that is our family." – *Parent of one child, uses ECEAP*

Another commonly cited challenge was availability/finding programs that have openings (4 mentions). One participant expressed:

- "It seems like overall there's a shortage of child care. I don't know if that's true or not, but based on everyone having a long waitlist. [...] I think also, because of this scarcity that exists, it creates a lot of pressure both on families and child care providers, with the creation of these kind of artificial waitlists. I think it's also an uncertainty for their businesses, of how many spots do I have filled, really." - *Expectant mother*

In addition to cost and availability, several participants mentioned location (3), not knowing where to look for information (3), and the need for flexible hours and scheduling (2) as other challenges. One participant describes:

- "The biggest challenge in my opinion in finding the right place is where to go to get started... To find where to go, where to start. You're always thinking, "Who do I have to talk to and where do I go?" It's always the same questions. Finding the right people to help you. If you don't have the knowledge of who is going to help, you will always be going in circles. [...] There's a lot of help and support, but people don't know they exist.

When I started the program and got information, I was so surprised at how many resources are available that we don't know about." – *Parent of color with four children, uses center-based care*

Lastly, a few participants spoke about challenge of finding quality care (2 participants), while other participants cited specific factors related to quality care such as finding a place one can trust (2), finding a program that best fits your family's needs (2), and safety (1). One participant who uses FFN care cited consistency as a major challenge since there is not a consistent person in the family to take of her child.

2.7 Summary

This parent engagement effort provided insight into child care decision-making and accessibility challenges experienced by families in communities that are often overlooked or underrepresented in traditional survey research, particularly those who tend to use unregulated or informal care arrangements.

Parents provided important stories and detail especially about the unaffordability of care and how the exorbitant cost had impacted their choices in employment and child care. They also described their predominantly informal/unregulated child care arrangements, and some spoke explicitly about having inconsistent child care situations as a challenge. Many of the parents we interviewed described disruptions due to child care issues in their work schedules or attendance, and many discussed their decisions to cut back on their work or leave the employment market at least temporarily due to unmanageable child care costs.

The MomsRising team has observed additional cultural context from their experience working with vulnerable and immigrant communities, shedding more light on reasons why some families often select unregulated/ FFN care.

- Among Latino/a families, child care decisions are influenced by cultural issues such as concerns their children might be discriminated against by white caretakers, or having greater trust in family members (it is customary for grandparents to be involved in helping to raise their grandchildren).
- Undocumented families do not qualify for some government programs, and even if their children do qualify as U.S. citizens, the parents fear not being able to apply for citizenship in the future due to Public Charge limitations. Note that while documentation status was not an explicit question in interview sessions, it came up spontaneously in some parent's discussion of challenges.
- For low-income families, access to child care information for selection and decisions may be affected by lack of access to technology (home computer, Internet connectivity) and/or not knowing how to use technology.
- Language barriers may play a role: Families may not have access to resource materials in their own primary language, and center-based programs may be English-speaking only and/or don't have staff that speak their language.

3. State Employee Child Care Survey

3.1 Survey Overview/Methods

To capture concerns and challenges experienced by Washington state employees addressing child care needs, a State Employee Child Care Survey was administered in November and December 2019 by the Office of Financial Management (OFM), State Human Resources. The survey fulfills a 2019 legislative requirement, codified as Revised Code of Washington (RCW) 43.41.800. Key findings are provided below.

The State Employee Child Care Survey was conducted online via SurveyMonkey. The survey tool was developed through a collaboration between OFM, the Department of Commerce, the Department of Children, Youth, and Families, and the Health Care Authority. Per state law, the survey sought to identify the number of children age 12 and under of state employees who were receiving care from child care or early learning providers in formal or informal settings, differentiated by type of care. The survey further sought to identify the number of children of state employees whose care was paid for in whole or in part with state subsidies, and allow respondents to describe challenges faced in accessing or paying for child care. State law specified that the survey must ask employees to provide their total annual household income.

The survey was distributed to over 65,000 state executive branch agency employees, and 6,348 responded (representing 9.8% of the total state employee workforce⁴). The survey was advertised to employees by their employing agency; individual custom links were not provided. Those responding were kept anonymous; no individually identifying information was collected with the survey responses. Survey instructions included text advising that the survey was voluntary and was intended only for employees with children age 12 or younger. Screening questions prevented completion of the survey by individuals who indicated they were not currently employed by a state executive branch agency or did not have children 12 or younger.

3.2 Respondent Demographics

More than half of the employees responding (55.5%) were female; just over a quarter (26.8%) were male. The majority of respondents (58.6%) were white; additional detail of race/ethnicity is shown in Table 1. Nearly all responding to the survey (96.3%) were employed full time.

⁴ The survey went out to all employees of “executive branch cabinet agencies” – 65,118 employees according to WA OFM 6/30/19 headcount.

Table 8. State Employee Survey: Respondent Demographics

	Count	% of Total Survey Respondents	% of Question Respondents
Household Type	(n=6,348)		(n=5,445)
Single parent	993	15.6	18.2
Two parent	4,336	68.3	79.6
Other	116	1.8	2.1
Unknown	903	14.2	
Household Size	(n=6,348)		(n=5,465)
1 or smaller	31	.5	.6
2	369	5.8	6.8
3	1,806	28.4	33.0
4	2,049	32.3	37.5
5	784	12.4	14.3
6	275	4.3	5.0
7 or more	151	2.4	2.8
Unknown	883	13.9	
Household Income	(n=6,348)		(n=5,110)
Under \$30,000	81	1.3	1.6
\$30,000-\$39,999	257	4.0	5.0
\$40,000-\$49,999	397	6.3	7.8
\$50,000-\$59,999	523	8.2	10.2
\$60,000-\$79,999	1,004	15.8	19.6
\$80,000-\$99,999	939	14.8	18.4
Over \$100,000	1,909	30.1	37.4
Decline to answer	355	5.6	
Unknown	883	13.9	
Language at home	(n=6,348)		(n=5,436)
English	4,450	70.1	81.9
Other language	986	15.5	18.1
Unknown	912	14.4	

The majority of respondents lived in households where there are two parents (68.3%). Almost half of households reported they earned over \$80,000 per year (44.9%). About 70% speak English at home. Most households consisted of 3 or 4 persons (60.6% combined).

Table 9. State Employee Survey: Respondent Household Demographics

	Count	% of Total Survey Respondents	% of Question Respondents
Gender	(n=6,348)		(n=5,252)
Female	3,525	55.5	67.1
Male	1,699	26.8	32.3
Non-binary / X	28	.4	.5
Prefer not to say	156	2.5	
Unknown	940	14.8	
Race/Ethnicity	(n=6,348)		(n=5,059)
Asian/Pacific Islander	263	4.1	5.2
Black	176	2.8	3.5
Hispanic	455	7.2	9.0
Native American	38	.6	.8
White	3,717	58.6	73.5
Two or more races	410	6.5	8.1
Unknown	1,289	20.3	
Employment	(n=6,348)		(n=6,285)
Full time	6,115	96.3	97.3
Part time	170	2.7	2.7
Unknown	63	1.0	

Respondents provided their county of residence, which was categorized in analysis into regions as used by Child Care Aware of Washington:

- Olympic Peninsula: Clallam, Grays Harbor, Jefferson, Kitsap, Mason, Thurston
- King & Pierce: King, Pierce
- Eastern: Asotin, Benton, Columbia, Franklin, Garfield, Lincoln, Pend Oreille, Spokane, Stevens, Walla Walla, Whitman
- Northwest: Island, San Juan, Skagit, Snohomish, Whatcom
- Southwest: Clark, Cowlitz, Klickitat, Lewis, Pacific, Skamania, Wahkiakum
- Central: Adams, Chelan, Douglas, Ferry, Grant, Kittitas, Okanogan, Yakima

A little less than half (44%) of those responding lived in the Olympic Peninsula region while 21% lived in King and Pierce Counties, 15% in Eastern Washington, 8% in Northwest Washington, 7% in Southwest Washington, and 5% in the Central Washington region.

3.3 Children and Child Care Arrangements

The majority (87%) of respondents reported having only 1 or 2 children. Less than one-fourth (21.9%) of the children reported were under 30 months in age, so a large majority of families included preschool and school-age children.

Table 10. State Employee Survey: Number of Children by Age

Child Age	# of Respondents*	# of Children	Average Children per Employee
Under 1 year	796	825	1.1
1 year - 17 months	616	716	1.2
18 - 29 months	777	804	1.0
30 months - 5 years, not in school	1,881	2,067	1.1
5 - 12 years, in school	4,343	6,292	1.4
Total all age groups	6,294	10,704	1.7

* Fifty-four employees did not report number of children by age.

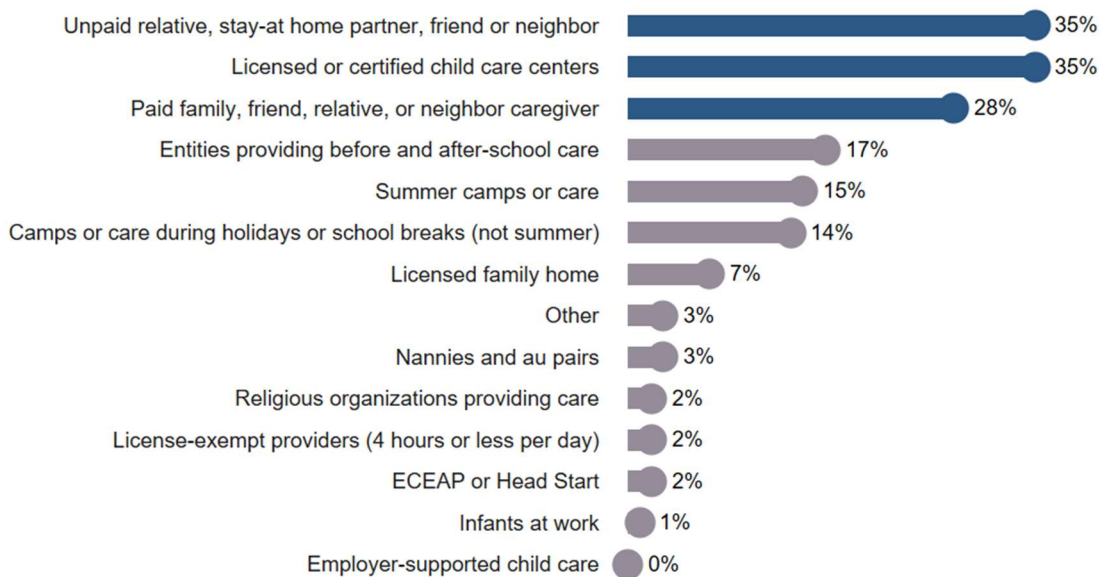
Over a fifth of respondents (21.9%) had at least one child in the infants/toddlers age group:

- Under 1 year: 7.7% of respondents
- 12-17 months: 6.7% of respondents
- 18-29 months: 7.5% of respondents

Nearly a fifth (19.3% had at least one child of preschool age (30 months – 5 years, not in school). Over half (58.8%) had at least one child who is school-age.

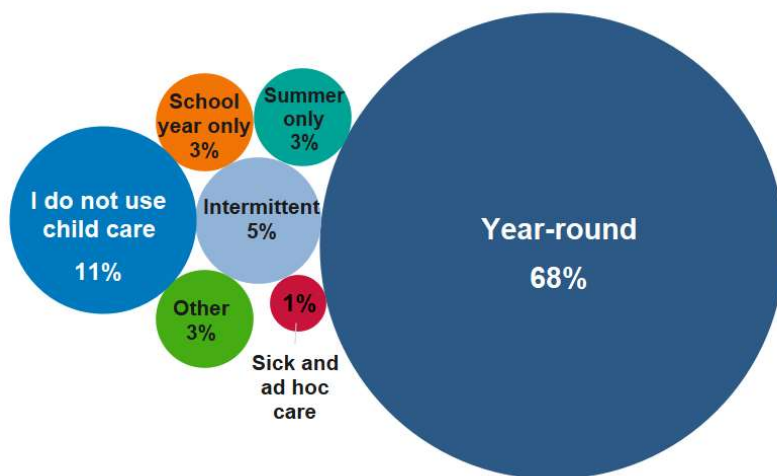
When asked about the child care arrangements used for their children, the top two responses included licensed or certified child care centers (35.2%), and unpaid relative, stay-at-home partner, friend or neighbor (34.7%). The next most frequently used arrangement (used by 28% of families) is a combination of paid family, friend, or neighbor (20%) and other paid relative (8%). Seventy-nine (79) respondents said they take advantage of the Infants at Work opportunity available to State of Washington employees, which represents roughly 10% of the respondents who reported they had a child under one year of age. Detail is shown in Figure 24.

Figure 24. State Employee Survey: Type of Child Care



When describing when they use child care, most respondents said they use child care year round (68%). Approximately 11% of respondents selected “I do not use child care” – it is unclear whether those children are perhaps in informal arrangements that the family does not consider child care (e.g., unpaid friend, family or neighbor, Infants at Work, other parent/partner).

Figure 25. State Employee Survey: When Child Care Is Used



The amount paid monthly for child care is closely linked to the number of children the employee has and their children’s ages. The survey asked for the amount paid per month for all children, so it is unclear how much is paid for each child in a family, and for what ages the cost covers. In addition, many families reported no payment for child care provided by a spouse/partner, unpaid care from family members, coverage from subsidy, and others. Many employees also reported

that their monthly payments varied depending on the time of year. For example, employees reported paying more per month for their school-aged children during summer.

Table 11. State Employee Survey: Average Monthly Child Care Payment, Including Families that Do Not Pay for Child Care

	n	Mean	Median	SD	Min.	Max.
All	4,283	\$764	\$650	\$640	\$0	\$5,000
Race/Ethnicity						
Asian/Pacific Islander	181	\$881	\$850	\$636	0	\$3,500
Black	127	\$732	\$700	\$539	0	\$2,500
Hispanic^a	339	\$681	\$600	\$571	0	\$4,000
Native Amer.	26	\$790	\$500	\$731	0	\$3,000
White	2,821	\$775	\$650	\$661	0	\$5,000
Two or more races	299	\$754	\$600	\$669	0	\$4,500
Region						
Central	200	\$581	\$500	\$455	0	\$2,500
Eastern	571	\$654	\$600	\$510	0	\$3,000
Northwest	317	\$859	\$750	\$689	0	\$3,000
Southwest	276	\$681	\$600	\$681	0	\$5,000
King and Pierce Counties	859	\$918	\$800	\$744	0	\$4,000
Olympic Peninsula	1,766	\$757	\$650	\$613	0	\$4,500

As Table 12 shows, the average payment for child care for families who pay any amount is \$866 per month for one or more children. Asian and Pacific Islander families pay the most at \$967 per month, and Hispanic families pay the least at \$747 per month. White families pay \$876 per month which, like Asian and Pacific Islander families, is more than the state average. Families living in the King and Pierce Counties region have the highest monthly cost (\$1,012), while families in the Central region pay the least (\$656). Families in both the King and Pierce Counties and Northwest regions pay more than the monthly state average for child care.

Table 12. State Employee Survey: Average Monthly Child Care Payment, for Families Paying for Child Care

	n	Mean	Median	SD	Min.	Max.
All	3,779	\$866	\$764	\$613	\$1	\$5,000
Race/Ethnicity						
Asian/Pacific Islander^a	165	\$967	\$1,000	\$601	\$90	\$3,500
Black	116	\$801	\$700	\$512	\$30	\$2,500
Hispanic	309	\$747	\$600	\$555	\$15	\$4,000
Native Amer.	24	\$856	\$650	\$723	\$100	\$3,000
White	2,493	\$876	\$753	\$625	\$10	\$5,000
Two or more races	264	\$854	\$710	\$650	\$15	\$4,500
Region						
Central	177	\$656	\$520	\$430	\$40	\$2,500
Eastern	501	\$745	\$650	\$477	\$5	\$3,000
Northwest^c	271	\$1,005	\$900	\$639	\$10	\$3,000
Southwest	234	\$803	\$700	\$669	\$15	\$5,000
King and Pierce Counties^b	779	\$1,012	\$850	\$718	\$10	\$4,000
Olympic Peninsula^d	1584	\$844	\$760	\$587	\$15	\$4,500

^a The difference of the average payments between the highest (Asian/Pacific Islander) and the lowest (Hispanic) category is statistically significant ($p < .05$).

^b The differences of the average payments between King/Pierce Counties and Central, Eastern, Olympic Pen., Southwest regions are statistically significant ($p < .05$).

^c The differences of the average payments between Northwest and Central, Eastern, Olympic Pen. regions are statistically significant ($p < .05$).

^d The differences of the average payments between Olympic Pen. and Central, Eastern, Northwest, King/Pierce regions are statistically significant ($p < .05$).

In order to understand the monthly cost of child care broken down by the number of children in the family and the child's age, it is important to keep in mind that the survey asked monthly cost for child care for all of the family's children in one lump sum. To examine this further, the amount paid was cross-referenced during analysis with the numbers of children in the family and the ages of those children (i.e., family having at least one child in the age group), shown in Table 13. Therefore, while families with a toddler pay the most for child care monthly (\$1,115) that might be because the family also has an infant or older child. It does not necessarily mean that child care costs for a toddler alone are higher than the cost of care for an infant. Without reporting of costs separately by individual child, this information should be interpreted with caution.

The average monthly payment increases with the number of children in the family until there are 5 or more children. It may be assumed that families with 5 or more children include at least 1 school-age child which would potentially reduce the amount they pay overall.

Table 13. State Employee Survey: Average Monthly Child Care Payment by Number and Ages of Children

	Average Monthly Payment
Number of children in the household	
1 child ^a	\$613
2 children	\$921
3 - 4 children	\$1,009
5+ children	\$835
Children's Age	
Under 1	\$1,042
1 year - 17 months	\$976
18 - 29 months	\$1,115
30 months - 5 years, not in school	\$1,020
5 - 12 years, in school	\$673

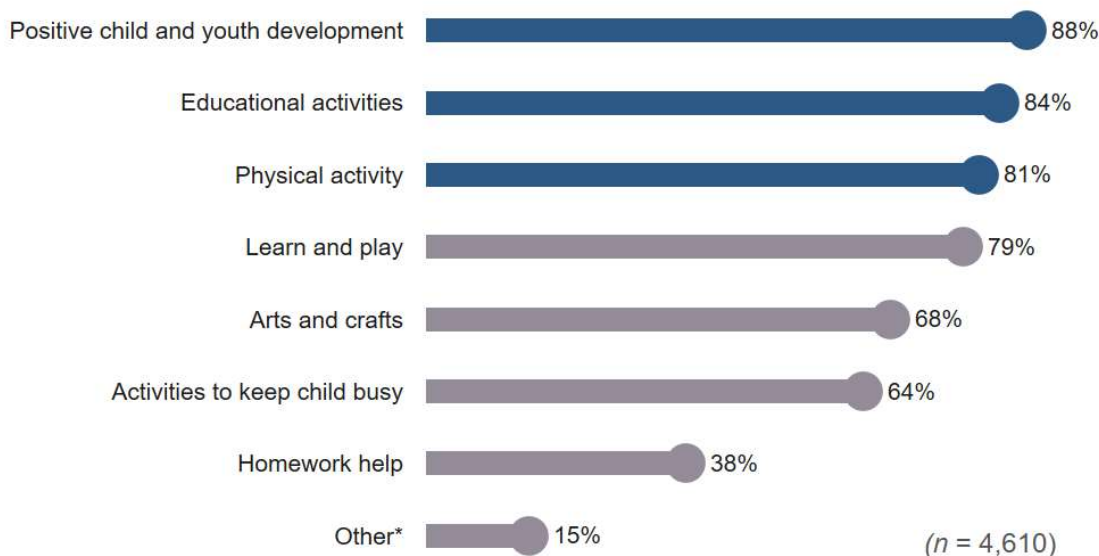
^a Statistically significant differences are found between 1 child families and 2 children, 3-4 children families.

Almost all families (95%) pay for their child care completely out of pocket without any assistance. Only a few state employees reported they used the various child care assistance programs to pay for child care (subsidies, scholarships, and other financial assistance), although as seen in the previous tables, many employees may use unpaid or free child care.

3.4 Child Care Needs and Preferences

Employees were asked to select what characteristics they look for in a child care program. (Note, only inherent aspects of the program itself were presented in this question; this did not include other selection factors such as cost or location). Employees were asked to select all applicable responses, but these were not broken down by child. The number one thing families look for in a program is one that promotes positive child and youth development (88%). This is followed closely by programs offering educational activities (84%) and physical activity (81%).

Figure 26. State Employee Survey: Preferred Child Care Program Characteristics



*Respondents provided “Other” explanations in open-ended comments; described in separate report

Families were asked how easy it is to find and keep child care; the responses were tabulated with the responses to the family’s preferred child care characteristics (see Table 14). Families finding it easy or very easy in finding and keeping child care (14%) were most interested in programs offering positive child and youth development and educational activities. Families that found it difficult or very difficult to find and keep child care (59.6%) were also looking for positive child care youth development and educational activities.

Table 14. State Employee Survey: Ease Finding Child Care with Preferred Characteristics

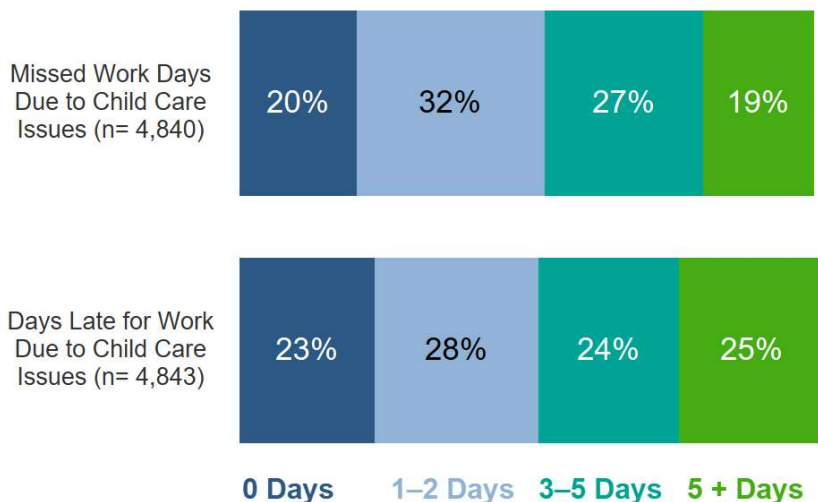
Preferred Child Care Characteristics	Ease finding child care		
	Easy (n=616)	Neither (n=1,168)	Difficult (n=2,632)
Educational activities	82%	83%	85%
Positive child and youth development	88%	87%	89%
Learn and play	79%	78%	80%
Activities to keep child busy	62%	65%	64%
Physical activity	79%	83%	81%
Arts and crafts	69%	69%	68%
Homework help	34%	37%	38%
Other	14%	11%	16%

3.5 Employment Challenges/Impact and Barriers Related to Child Care

Employees were asked whether they have had to miss work or if they have been late to work in the last six months due to child care issues. Only 20% of employees reported never (0 days) missing work; in other words, 80% of respondents said they had missed work at least once in

the last six months due to child care issues. Almost half (46%) of the employees reported missing or arriving to work late three or more days in the last six months. In addition, just 23% were never (0 days) late due to issues with their child care, that is, 77% were late at least once in the last six months due to child care issues, and nearly half (49%) were late because of child care issues at least 3 or more days in that time period.

Figure 27. State Employee Survey: Work Affected by Child Care Issues



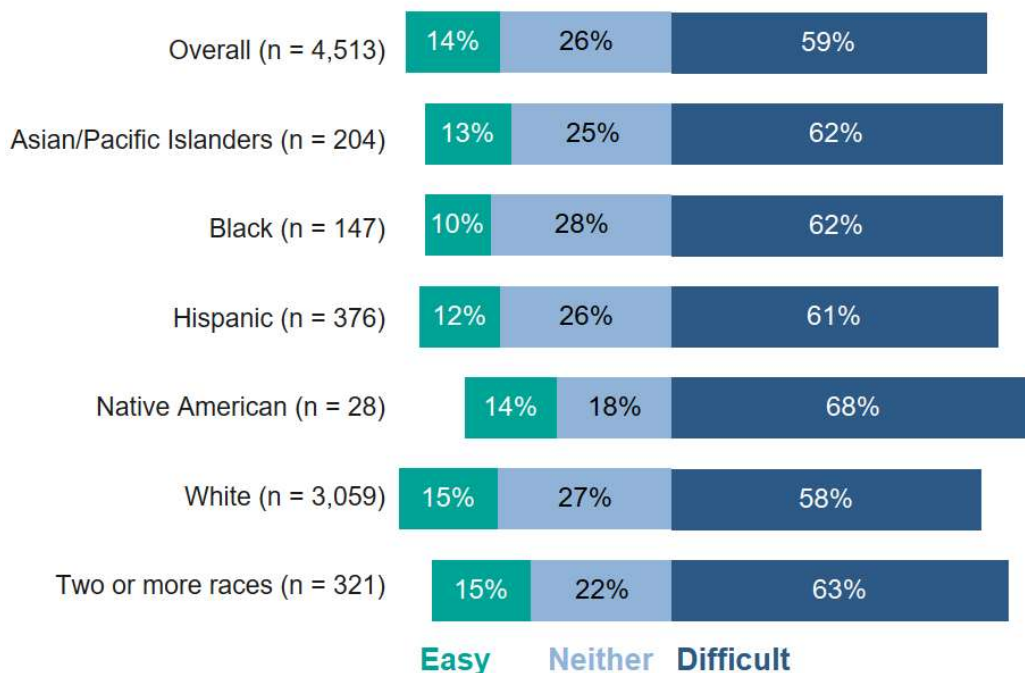
Age of children appeared to play a role in missing work or lateness due to child care issues (see Table 15). Families with at least one school-age child were the least likely to miss more than a week of work due to child care issues. Families with at least one older infant (12 – 17 months) were the most likely to miss work or run late. Families with young infants and/or school-age children were least likely to miss work or run late due to child care issues.

Table 15. State Employee Survey: Work Affected by Child Care Issues, by Child Ages

	Child Age				
	Under 1 year	1 year to 17 months	18 to 29 months	30 months to 5 years (not in school)	5 through 12 years
# Work Days Missed Due to Child Care Issues					
n	573	472	622	1,565	3,276
0 Days	20%	13%	18%	16%	21%
1-2 Days	29%	27%	27%	31%	34%
3-5 Days	25%	32%	32%	30%	27%
5+ Days	27%	28%	23%	22%	18%
# Days Late for Work Due to Child Care Issues					
n	573	475	620	1,570	3,275
0 Days	25%	19%	22%	21%	24%
1-2 Days	23%	28%	24%	27%	28%
3-5 Days	23%	27%	25%	24%	23%
5+ Days	28%	26%	30%	27%	25%

Demographic factors are associated with respondents' reports of how easy it is to find child care. Respondents were asked to rate how easy it is for them to find and keep child care. Almost 60% find it difficult or very difficult to find and keep child care. Finding care is difficult for over half of respondents in all ethnic groups. Native American respondents reported the most difficulties finding and keeping child care. White respondents were least likely to say it was difficult; yet, over half (58%) of white families said finding care was difficult.

Figure 28. State Employee Survey: Ease in Finding and Keeping Child Care by Race/Ethnicity



As shown in Table 16, families who don't speak English at home have more difficulty finding and keeping child care, as do families earning less than \$50,000 per year, Native American families, and families in the Southwest and Central regions.

Families earning over \$100,000 have it easier although have still report some difficulty finding and keeping child care. Black and Hispanic families have an easier time than families of other races/ethnicities but over 60% of these families still have difficulty. Families in the Central region have less difficulty finding and keeping child care than families in other regions of the state.

Table 16. State Employee Survey: Ease in Finding and Keeping Child Care by Family Demographics and Region

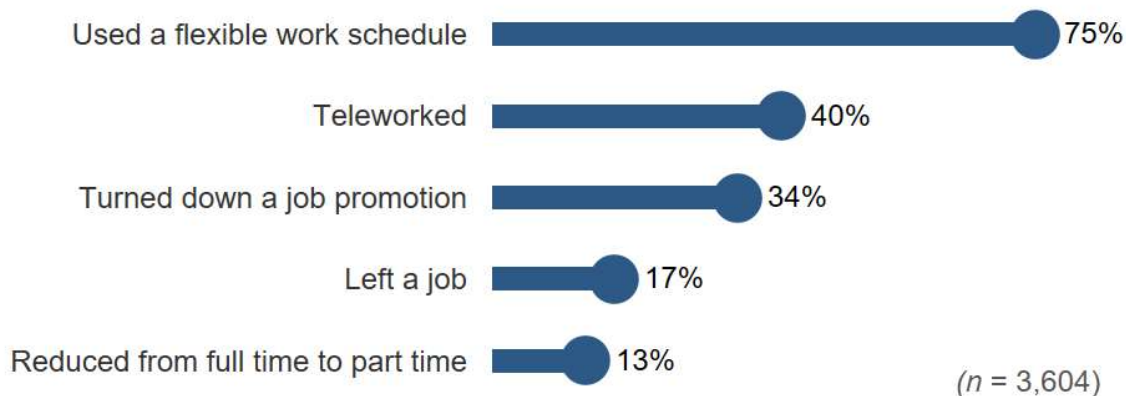
Ease in finding child care	n	Easy	Neither	Difficult
Language^a				
Speak English at home	3,647	15%	27%	59%
Speak other language at home	790	12%	25%	63%
Income^b				
Under \$30,000	63	10%	21%	70%
\$30,000-\$39,999	211	10%	21%	68%
\$40,000-\$49,999	308	9%	22%	68%
\$50,000-\$59,999	424	9%	25%	66%
\$60,000-\$79,999	781	12%	25%	64%
\$80,000-\$99,999	758	13%	25%	62%
Over \$100,000	1,626	20%	29%	51%
Race/Ethnicity^a				
Asian/Pacific Islander	204	13%	25%	62%
Black	147	10%	28%	62%
Hispanic	376	12%	26%	61%
Native American	28	14%	18%	68%
White	3,059	15%	27%	58%
Two or more races	321	15%	22%	63%
Region^b				
Central	214	9%	24%	67%
Eastern	617	13%	26%	61%
Northwest	310	13%	24%	64%
Southwest	343	11%	21%	68%
King and Pierce Counties	956	13%	28%	59%
Olympic Peninsula	1,922	17%	27%	56%

^a Group differences were not statistically significant.

^b Group differences were not statistically significant, $p < .01$.

Employees were asked how their job had been affected due to issues accessing child care. They were able to select more than one response. Three-fourths (75%) of parents responding have used a flexible work schedule (e.g., compressed work week, nonstandard hours) due to issues accessing child care, and 40% have been able to telework. Less commonly, employees reported other possibly more negative impacts, included turning down a job or promotion (reported by 34%), having left a job (17%), and reducing their work hours from full time to part time (13%).

Figure 29. State Employee Survey: Changes Made at Work Due to Child Care Issues



One-fourth (25%) of respondents who were single parents reported they had left a job and nearly half (45%) reported they had turned down a job or promotion because of issues accessing child care. Employees in two-parent households were more likely to telework and use a flexible work schedule.

Respondents in households earning less than \$50,000 were less likely than those at higher income levels to telework or use a flexible work schedule. These parents were also more likely to report having left a job, turned down a job or promotion, or reduced their hours to part time. Respondents in households earning over \$80,000 were the most likely to telework or use a flexible work schedule and the least likely to report having left a job, turned down a job or promotion, or reduced their hours to part time.

White and Asian/Pacific Islander parents were more likely than other race/ethnic groups to use a flexible work schedule and telework, and least likely to report having left a job. Black, Hispanic, American Indian/Alaska Native (AIAN), and multi-racial parents were more likely than other groups to report having left a job, turned down a job or promotion, or reduced their hours to part time (although AIAN parents are less likely than the others to report having reduced their hours).

Parents in the Southwest region were less likely than those in other regions to report having left a job or turned down a job or promotion. Those in the Central region were least likely to report having reduced their hours and most likely to telework or use a flexible schedule. Parents in the Olympic Peninsula region were less likely to report having left a job, turned down a job or

promotion, or reduced their hours, and the most likely to telework or use a flexible work schedule.

Table 17. State Employee Survey: Changes Made at Work Due to Child Care Issues, by Family Demographics and Region

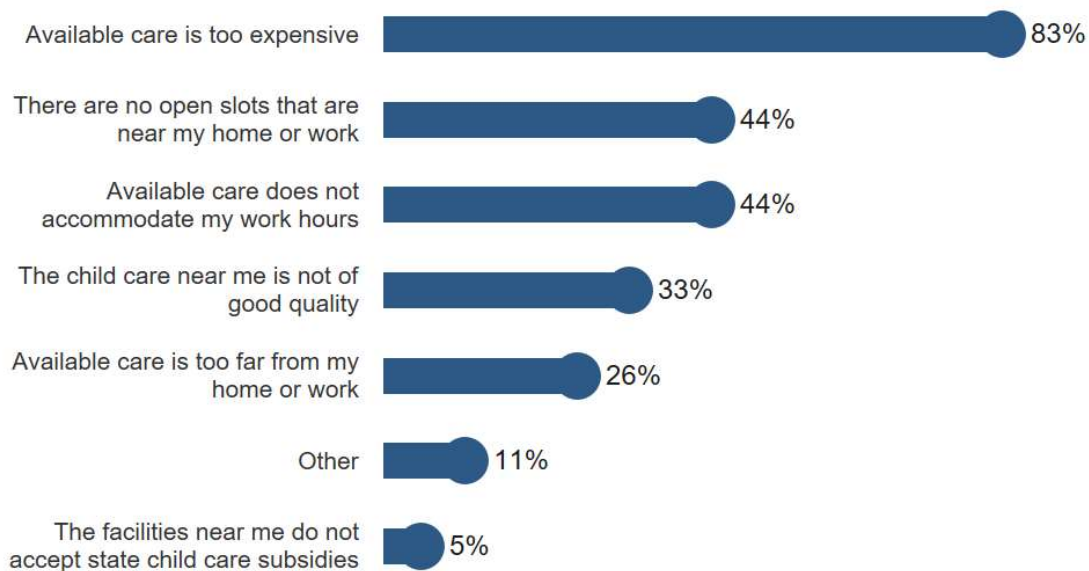
	Count (n)	Left a Job	Reduced from full time to part time	Turned down a job or promotion	Teleworked	Used a flexible work schedule
Family Type		b	a	b	b	b
Single parent	686	25%	16%	45%	26%	71%
Two parents	2,798	15%	12%	31%	43%	77%
Income		b	b	b	b	b
Under \$30,000	54	41%	43%	48%	7%	54%
\$30,000-\$39,999	168	33%	26%	49%	11%	67%
\$40,000-\$49,999	233	27%	16%	55%	17%	66%
\$50,000-\$59,999	315	22%	13%	42%	21%	70%
\$60,000-\$79,999	625	19%	12%	38%	35%	72%
\$80,000-\$99,999	610	14%	10%	32%	37%	79%
Over \$100,000	1,325	10%	11%	26%	58%	81%
Race/Ethnicity		b	a	b	b	b
Asian/Pacific Islander	175	14%	17%	31%	46%	77%
Black/African American	129	22%	14%	48%	26%	70%
Hispanic/Latino/a American	300	22%	14%	36%	29%	69%
Indian/Alaska Native	23	22%	4%	57%	35%	61%
White/Caucasian	2,406	15%	13%	32%	42%	78%
Two or more races	272	23%	14%	40%	42%	70%
Region		b	a	b	b	b
Central	165	22%	12%	36%	24%	76%
Eastern	443	20%	14%	41%	24%	70%
Northwest	267	18%	16%	42%	30%	71%
Southwest	255	15%	14%	33%	34%	77%
King and Pierce Counties	822	19%	14%	36%	40%	74%
Olympic Peninsula	1,540	14%	12%	31%	50%	79%

^a Group differences were not statistically significant.

^b Group differences were not statistically significant, $p < .05$.

Employees were asked to select all problems they had experienced finding child care. The majority of families, regardless of their family type, income, race/ethnicity, or location say that available care is too expensive.

Figure 30. State Employee Survey: Challenges Finding Child Care



Single parents, respondents in households earning under \$60,000, Black and American Indian/Alaska Native (AIAN) respondents, and respondents in the Northwest region reported the high cost of care as a problem more frequently than other family types.

Finding care that can accommodate the family’s work hours is also a problem for many families. In particular, single parents, respondents in households earning under \$60,000, multi-racial respondents, and respondents in the Eastern and King and Pierce Counties regions report this as a problem.

The availability of care near home or work, and facilities that accept state child care subsidies are least likely to be reported problems for families, although single parent households and families earning less than \$40,000 find these to be problematic.

Table 18. State Employee Survey: Challenges Finding Child Care by Family Demographics and Region

	Count (n)	Available care is too far from my home or work	Available care is too expensive	Available care does not accommodate my work hours	There are no open slots in care that is near my home or work	The child care near me is not of good quality	The facilities near me do not accept state child care subsidies
Family Type		a	b	a	b	a	b
Single parent	813	25%	88%	48%	42%	31%	8%
Two parents	3,183	27%	81%	43%	45%	33%	4%
Income		a	b	b	a	a	b
Under \$30,000	61	36%	90%	66%	49%	34%	13%
\$30,000-\$39,999	198	31%	91%	48%	40%	35%	17%
\$40,000-\$49,999	302	23%	95%	45%	43%	30%	7%
\$50,000-\$59,999	400	26%	90%	45%	40%	33%	6%
\$60,000-\$79,999	746	24%	87%	42%	43%	31%	4%
\$80,000-\$99,999	703	26%	85%	44%	47%	33%	3%
\$100,000+	1,417	27%	74%	43%	46%	33%	2%
Race/Ethnicity		a	b	a	b	a	a
Asian/Pacific Islander	190	23%	88%	40%	30%	33%	4%
Black	133	29%	92%	41%	36%	34%	7%
Hispanic	347	21%	84%	41%	36%	27%	5%
Native American	27	30%	93%	44%	37%	22%	4%
White	2,797	27%	82%	44%	46%	33%	4%
Two or more races	301	24%	82%	47%	46%	34%	5%
Region		a	a	b	a	a	a
Central	198	25%	83%	40%	47%	30%	4%
Eastern	572	27%	83%	52%	44%	31%	4%
Northwest	326	25%	87%	45%	45%	32%	5%
Southwest	288	27%	84%	38%	47%	34%	5%
King & Pierce Counties	885	27%	85%	48%	41%	31%	5%
Olympic Peninsula	1737	26%	81%	41%	46%	35%	5%

^a Group differences were not statistically significant.

^b Group differences were not statistically significant, p<.05.

Families were also able to enter their own responses (open text) for problems with finding and keeping child care. These responses were then coded into categories of themes. The responses had a similar theme: by far, the most common theme was that the affordability and availability of quality child care is a challenge for them.

Table 19. State Employee Survey: Challenges Reported by Respondents (Coded Open Responses)

	Count	% (Total n = 400)
Cost/expense	286	72%
Availability/Openings	80	20%
Hours of care	63	16%
Quality	44	11%
Type of care	37	9%
Location/Proximity to home/Work	28	7%
Backup care	24	6%
Transportation	18	5%
Flexibility	16	4%
Special needs	13	3%

Table 20. State Employee Survey: Challenges Reported by Respondents -- Examples of Open Text Responses

Responses Related to Each Challenge	
Cost/expense	<ul style="list-style-type: none"> It is very hard to find quality child care with availability, particularly for infants, and many options are prohibitively expensive. It is extremely difficult to obtain a safe, educational environment (let alone the cost) - the wait lists for all child care centers in our area are one or more year in advance. Most facilities in my area are too expensive and do not have enough space, so my options are limited. The biggest challenge is finding a local provider who has openings and also the cost associated with these providers is becoming astronomical. The before and after school care program at our school usually has a waitlist. My husband is a teacher, and his schedule changes every quarter, and we don't know how much child care we will need from quarter to quarter. At times, we have had to pay for more than we actually needed just so we don't lose our space in the program. I was on a waitlist for 10 months before my child was able to get into [child] care. I have extreme difficulty paying the monthly tuition of \$1,300. I previously had grandparents watch my child, but they were often ill which caused me to miss work frequently. We chose to enroll in full time child care for reliability. However, this has been a huge financial burden causing us to have to make payment arrangements and cut back on other household spending items. We only need child care intermittently, so it is difficult to arrange and keep regular providers. Summer camps are expensive.
Availability/Openings	
Hours of care	<ul style="list-style-type: none"> Very hard to find part time care providers; time for preschools are difficult to coordinate with working parents' schedule

Quality	<ul style="list-style-type: none"> Child care is very expensive. My daughter is not in [child] care but if I were to put her into [child] care it would cost as much as our rent. Also, my workday with commute (12 hrs) is longer than most [child] cares are open. Thus, we pay friends/family but do not get the same educational and social benefits of [child] care.
Type of care	<ul style="list-style-type: none"> Finding preschool programs that are longer than a couple of hours, insufficient preschool curricula at [child] care and I think the teacher-child ratio is too high at [child] cares so I use a nanny instead. I couldn't find state-covered child care and when I had to use a private agency, the state only reimbursed a portion of the child care costs.
Location/Proximity to home/Work	<ul style="list-style-type: none"> Child care hours are generally very close to my working hours. I have found a quality in-home child care that I like, but have to travel every day to get there, 45 extra minutes. It makes it difficult to have flexibility at work (such as staying a little longer to get something done).
Backup care	<ul style="list-style-type: none"> I'm lucky my child is school-aged and I have relatives that work from home for mornings. Even with that I had to change my work schedule because I don't have morning care for him and if there is a required morning meeting; I need at least a month notice. It is difficult with schedules, my schedules, relative schedules and when there is holidays (weeks out of school) or earlier release I'm scrambling. Also finding a clean, safe (no CPS referrals or Licensing referrals) and within my affordable range is very difficult.
Transportation	<ul style="list-style-type: none"> It was hard finding before and after school child care that would transport my son to school in the Olympia school district.
Flexibility	<ul style="list-style-type: none"> My spouse and I currently pay more out-of-pocket for child care than we do for rent. Additionally, since my wife has an alternative work schedule, we do not require full-time child care although we still have to pay for it due to limited providers willing to accommodate a part-time schedule. I am unable to work a flexed schedule or participate in overtime needs for my office due to our current provider closing soon after my regular hours end. If my wife needs to work overtime, occasionally, I will bring my child to work with me between the hours of 0600-0700 until our child care provider opens.
Special needs	<ul style="list-style-type: none"> My child has special needs and it is hard to find a welcoming program that is also equipped with knowledgeable staff Child care is almost one entire paycheck per month, my child has medical, developmental, and a specialized diet making it challenging to find more affordable child care that can meet her needs My child has ADHD and isn't always able to be cared for at these facilities as they are not always qualified to meet the child's needs and call parent to pick up earlier than the time.

3.6 Summary of State Employee Survey Findings

The Washington state employees experience many of the same challenges in accessing child care as do the rest of the state's working parents. Over half (59%) of state employees said that finding care was difficult, with some variations by race/ethnicity and income. Among the top challenges cited by Washington state employee parents were that care was too expensive, there are limited openings and that the care that is available does not accommodate working hours. Less-frequently mentioned concerns were that the care near them was not of good quality or was too far away from home or work.

The majority of employees responding, regardless of their family type, income, race/ethnicity, or location say that available care is too expensive, particularly noted by single parents, lower-income families Black and Native American families, and families in the Northwest region.

Finding care that can accommodate work hours is also a problem particularly for single parents, lower-income families, multi-racial families, and those in the Eastern and King and Pierce Counties regions.

State employee parents also noted changes they have made in their working arrangements or employment due to child care issues. Three-fourths (75%) of families responding have used a flexible work schedule (e.g., compressed work week, nonstandard hours) due to issues accessing child care. Forty percent (40%) have been able to telework, thirty-four percent (34%) have turned down a job or promotion, seventeen percent (17%) have left a job, and thirteen percent (13%) have reduced their work hours from full time to part time.

Issues with disruptions to child care have a clear impact on state employees' attendance and productivity. A majority of these parents (80%) said they had missed work at least once in the last six months due to child care issues. Almost half of the employees reported missing or arriving to work late three or more days in the last six months. In addition, over three quarters (77%) were late at least once in the last six months due to child care issues, and nearly half (49%) were late because of child care issues at least 3 or more days in that time period. These findings suggest that access to child care for the state employee workforce has an impact on the Washington state workplace.

4. Implications of Parents' Perspectives

These three sources of parents' reports of child care choices, needs and challenges were carried out with different populations (state executive branch employees, state general population, targeted underrepresented communities) and by different methods (online surveys, interviews). Even between the two survey efforts, the survey instruments were different and therefore the two datasets are not directly comparable. It is particularly important that the patterns of use of care were not gathered by the same methods, and the findings of any one effort should not be used to compare or discount the findings of the other studies.

However, several cross-cutting themes appear when considering these parent perspectives on child care accessibility.

Parents show a strong preference for family caregivers and home-based care, at least among the statewide parent survey and the parent interview sessions. State employee parents using non-parental care were equally likely to use a center-based arrangement as a friend/family member or other home-based setting. Parents in all three studies reported relying on multiple care arrangements, and parents in engagement sessions spoke in particular detail about how they have put together these various arrangements in response to the need for flexible care that is affordable and accommodates non-traditional working hours. The parent interviews, combined with MomsRising's perspective on the voices of vulnerable communities, illuminate the importance of trust and cultural fit in selecting the family environment of home care.

In all three efforts, parents reported cost and availability of care as major concerns. Parents in interviews provided testimonies of the need for family supports and publicly funded child care

subsidy or programs to help them remain in the workforce. Many spoke of having left their jobs at least temporarily because the cost of child care would eat up their earnings.

Likewise, parents reported from multiple angles the negative impacts on their jobs, whether on a day-to-day basis, or for their employment choices, from experiencing disruptions to child care. In both the statewide parent survey and the state employee survey, a substantial portion of respondents reported missing days of work, being late to work, turning down a job or promotion, or feeling that child care was a barrier to returning to employment. Parents in engagement sessions likewise provided their own stories of these impacts on their work and their employment choices. In a later section of this report, the economic impact analysis leverages the statewide parent survey data on employment impacts to develop a model to measure the fiscal impact of inaccessibility of care.

Much of this information was gathered as the impact of the COVID-19 pandemic had recently caused a new shutdown of workplaces, public gathering places, schools and child care facilities. As the state employee survey was conducted pre-pandemic, and the parent survey and engagement sessions generally asked about typical arrangements or conditions in the previous year, findings can cautiously be considered a “pre-pandemic” snapshot. The long-term impact of these changes, both for availability of care and for parents’ employment prospects is not yet known. Future analysis will be important to understand not only the new normal in supply of care, but parents’ own comfort level and ability to find care that supports their employment and family’s needs.

VI. Supply and Demand for Child Care in Washington

1. Overview of Supply and Demand Analysis

The assessment included an extensive analysis of the supply and demand for child care services for children from birth through age four. The analysis primarily focused on the supply of care in the formal, regulated child care market in Washington, including licensed child care centers, licensed family child care homes and licensed school-age-only child care providers. The analysis also included Head Start, Early Head Start, Migrant and Seasonal Head Start, American Indian and Alaska Native Head Start and Early Childhood Education and Assistance Program (ECEAP) sites. Further, the analysis estimated the demand for and supply of informal care that is provided outside of the regulated market for child care.

Centers and family child care homes are analyzed in great depth, since they are the largest market and primarily supply care for nearby families and are not constrained by administrative boundaries. By contrast, much of the school age child care is provided at a child's school and draws from only the students residing in the local school district. For this sector, capacity is compared to enrollment within the school district. Finally, informal market care is not studied in the same way that center- and home-based care is analyzed, since these providers are typically registering only so that they can provide care for a relative or close friend. That is, this capacity is not competitive, or generally available, in the same way as the capacity of licensed child care.

Determining demand for child care can be a tricky endeavor, and one that rests on assumptions of varying reliability. The estimated demand for child care is a function – among other factors – of population demographics, economic mobility, macroeconomic conditions, and, in the unique present case, public health threats. While some have used American Community Survey estimates of the population of young children with working parents, these data come with large margins of error, especially at smaller geographic units like census tracts or block groups. For this reason, this study uses the population of families with at least one child under the age of five as the potential demand. Obviously, not all families need or will choose to use licensed child care, but this approach allows for minimal error to be introduced from census estimates.

According to recent census data, there are approximately 336,000 families in Washington with at least one child under five. Since many families have more than one young child, the population of children in this age group number about 459,000. The number of children aged 5 through 12 is approximately 658,000. (U.S. Census Bureau, 2018). By simply dividing the capacity of licensed programs by the population they are built to serve, we get the following information:

- Licensed child care capacity for center- and home-based child care providers is 41% of the population under the age of five.
- Licensed school age care capacity is about 5% of the population of children aged 5 through 12.

2. Summary of Methodology

There are two methodologies employed for this supply and demand analysis: a distance-based approach for the center- and home-based child care providers; and an area-based approach school age child care programs. A more detailed version of this methodology is described in Appendix E.

The distance-based approach was developed by economists at the University of Minnesota and published in the peer-reviewed journal *Early Childhood Research Quarterly* (Davis, Lee & Sojourner, 2019). In summary, this approach uses a two-step calculation to estimate the supply within a 20-minute drive of a given family's location, giving greater weight to capacity closer to home and adjusting for the nearby density of families with young children as a proxy for potential demand. A step-by-step discussion of the methodology can be found in Appendix E.

Of course, the location of all families with young children is not public knowledge, so this approach requires the analyst to generate synthetic family locations, referred to herein as a "simulated family locations." These are place where, based on the probabilities determined by census data, one would likely find more or fewer families with a child under five. The simulated families are placed within census blocks and assigned a race and income category that corresponds to the joint probability of family characteristics outlined by robust census data. These simulated family locations are then analyzed in the context of nearby child care providers, their capacity, and the nearby population that would compete for the licensed capacity.

The resulting metric, sometimes referred to in the academic literature as "adjusted supply," or "demand-adjusted supply" is sometimes difficult to put into words, despite being an excellent statistic for understanding relative child care supply that accounts for demand. The number is usually between zero and one; in an example statistic of 0.35, this could be expressed as:

"The combined capacity of the licensed providers near this family is equal to approximately 35% of the nearby population of children under five."

The area-based approach used for school-aged child care is simply the sum of capacity of care available within each geographic area. For school aged child care, that area is the school district, or local education agency (LEA). The school aged care capacity is presented as a proportion of the enrollment by children aged five through 12.

The analysis may underestimate the total supply of school-age care, because it only analyzes data on licensed school-age-only programs and does not count the portion of capacity that is used for school-age child care in programs that are licensed to serve multiple age groups. Conversely, the analysis of the supply of programs serving younger children may overstate the capacity that is used for children birth to age five.

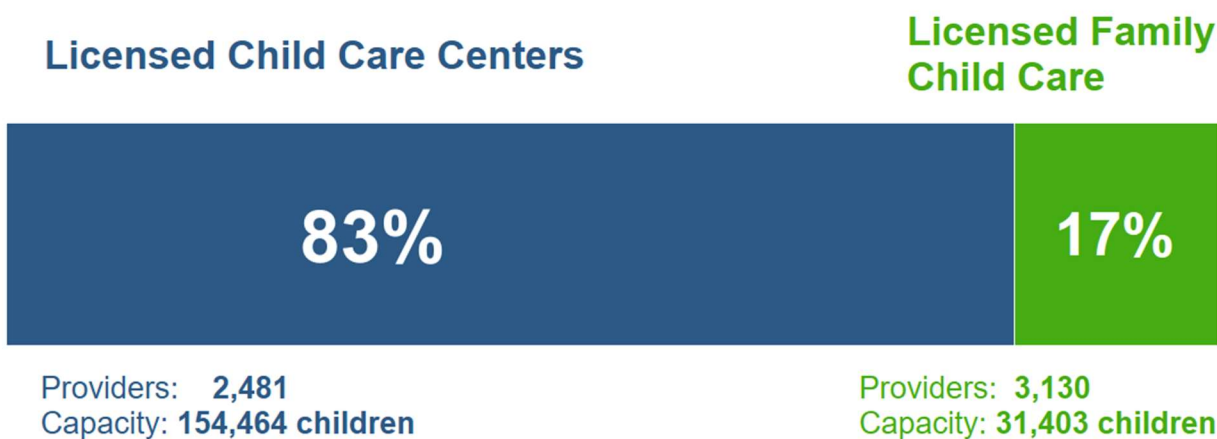
This section includes multiple tables, graphics and maps that were designed to transform data into insights that early childhood policymakers and key stakeholders can use in multiple ways to inform critical state and local policy decisions. In addition to these snapshots, an online Child Care Industry Insights Dashboard provides policymakers and stakeholders with the ability to explore the data on their own or as a team, to generate visualizations of access to child care at different geographic levels and to see how access varies across different income levels, race and ethnicity, and preferred type of care.

3. Supply and Demand for Child Care for Young Children

3.1 Overview of Supply of Programs Serving Young Children

This analysis focuses on the supply of care in the regulated child care market in Washington. It includes 5,611 child care providers that have the capacity to care for 185,867 children in settings that are either licensed by DCYF or those that are publicly funded that legally operate without a license. This includes 2,481 center-based providers (1,759 licensed child care centers and 722 publicly funded Head Start and ECEAP sites) with the capacity to serve 154,464 children (125,537 children in licensed child care centers and 28,927 children in publicly funded Head Start and ECEAP sites). It also includes 3,130 licensed family child care homes with the capacity to serve 31,403 children (Department of Children Youth and Families, 2020). Figure 31 illustrates how the capacity is divided across child care centers and family child care homes. The supply and demand for school age child care is discussed in a subsequent section.

Figure 31. Supply of Care for Children Birth to Age Five in Formal Child Care Market



This part of the analysis does not include providers in the informal child care market, such as care provided by friends, families or neighbors, au pairs or nannies. In the point-in-time dataset provided by the Washington Department of Children, Youth, and Family Services, there were more than 2,000 “family, friend, and neighbor” (FFN) child care providers who were caring for children receiving DCYF child care subsidies, typically caring for one or two children in either their home or the home of the child. According to the Department, in past years there have been as many as 6,000 FFN providers over the course of a full year. An estimate of the total supply of care in the informal market is provided in a subsequent section of this report.

3.2 Demographic Characteristics of Families with Young Children

The process for generating simulated family locations for this study is intended to assign realistic demographic characteristics so that the overall sample is reflective of the actual population of the 336,000 families with young children in Washington. The demographic breakdowns at the statewide level of the simulated sample are illustrated in Figures 32, 33 and 34 below.

Figure 32. Incomes of Families with Children Birth to Age Five

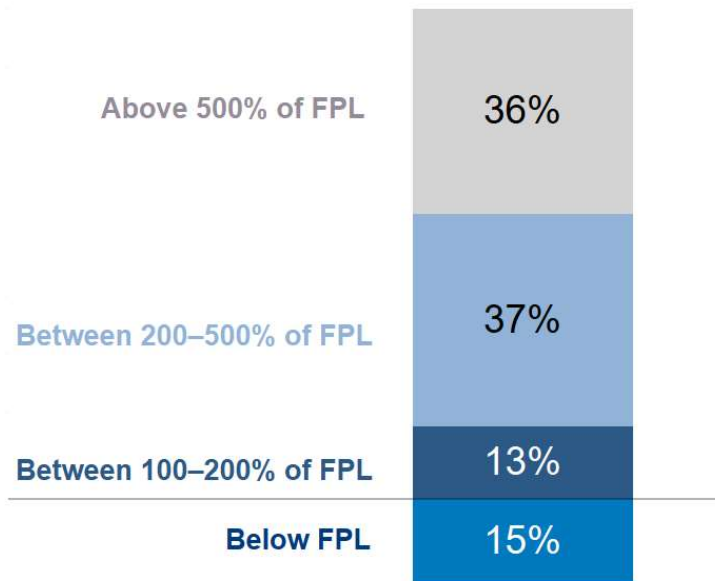


Figure 33. Race and Ethnicity of Families with Children Birth to Age Five

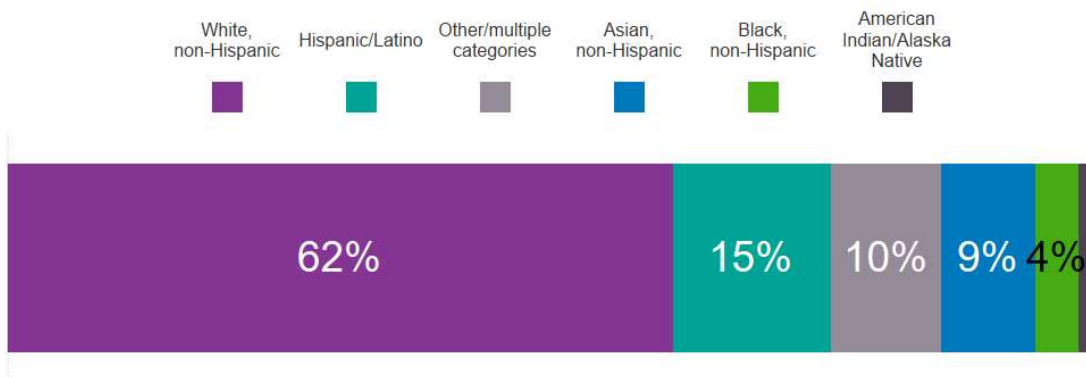
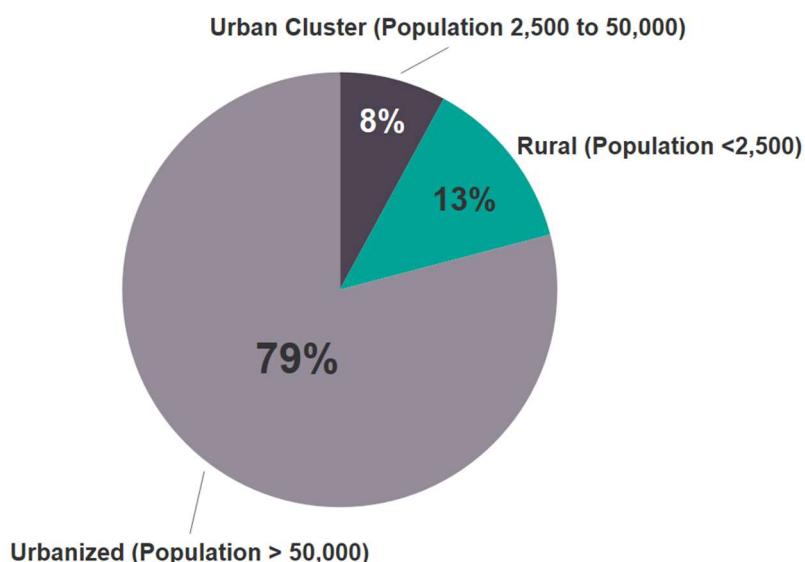
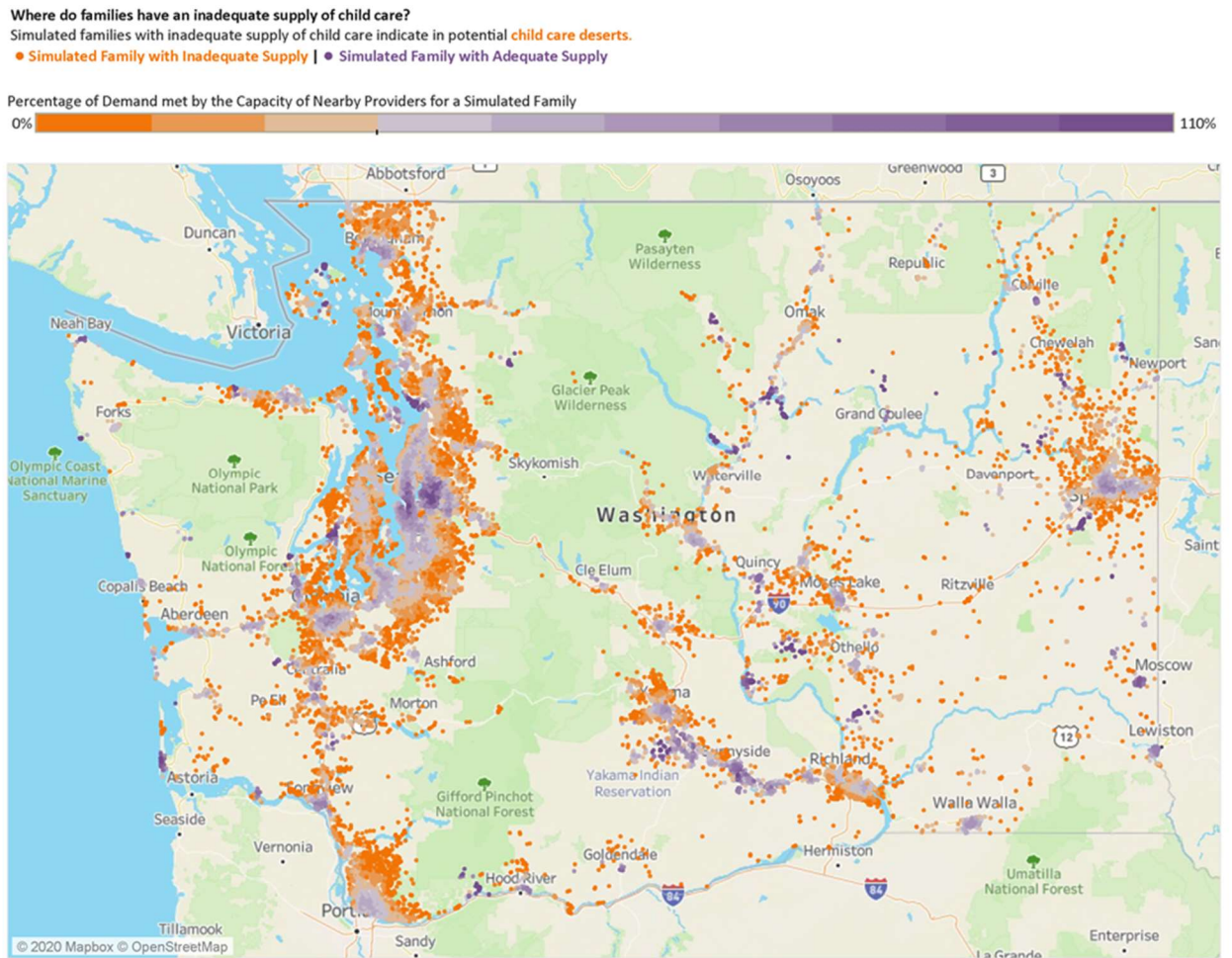


Figure 34. Urbanicity of Families with Children Birth to Age Five

3.3 Supply and Demand for Child Care for Families with Young Children

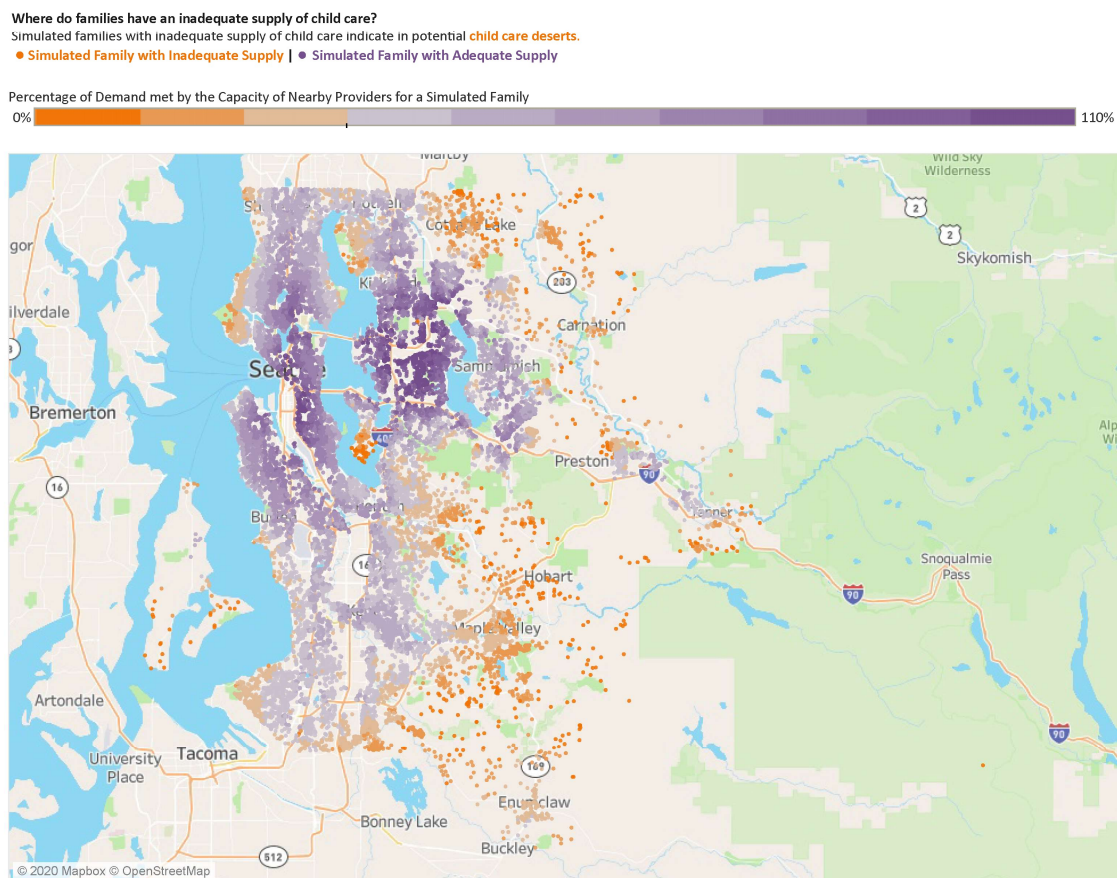
To examine the level of access that families with children birth to age five have to child care, the analysis used a distance-based methodology to determine the percentage of potential demand for child care that nearby providers, within a 20-minute drive time, could meet. The areas shown in purple in Figure 35 are able to meet a higher percentage of potential demand than the areas shown in orange, which indicate potential child care deserts. Across the state, the capacity of providers located within a 20-minute drive time can only meet 37% of the potential demand of nearby families. The level of access varies for a low of 18% in Garfield County to a high of 86% in San Juan County. The level of access for each county is detailed further in Table F.1 in Appendix F and can also be explored in more detail in the Child Care Industry Insights Dashboard.

Figure 35. Families Living in Child Care Deserts Statewide



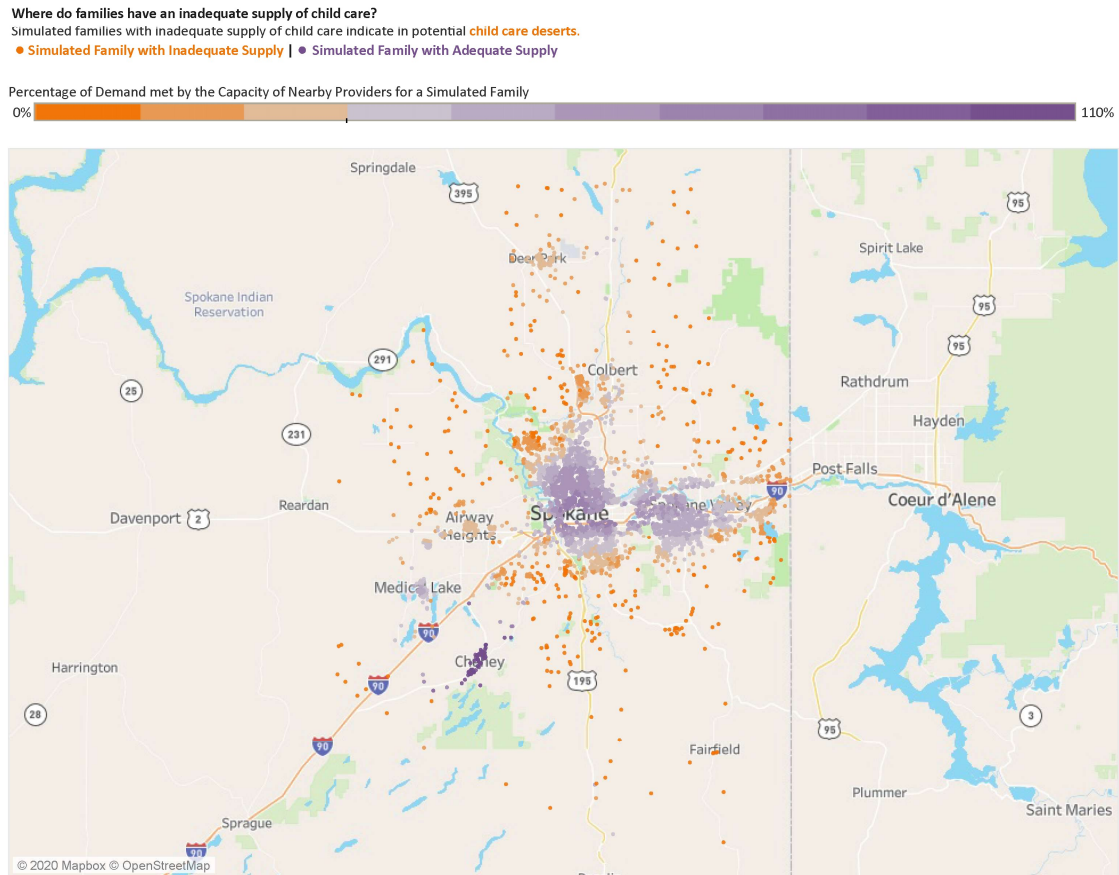
For stakeholders who are interested in looking at how access varies within specific counties, the Child Care Industry Insights Dashboard provides visualizations of access for each county. As an example, Figure 36 illustrates that the analysis found child care deserts in pockets within the most densely populated urban areas of King County, and to a greater extent, in areas located in suburban areas of Seattle. For families living in King County, providers located within a 20-minute drive time can only meet 51% of the potential demand of nearby families. Out of approximately 100,000 families with young children in King County, as illustrated in Table 21, about 20,000 (20%) live in child care deserts (where there more the capacity is capable of serving only 30% of potential children) with an inadequate supply of child care.

Figure 36. Families Living in Child Care Deserts – King County



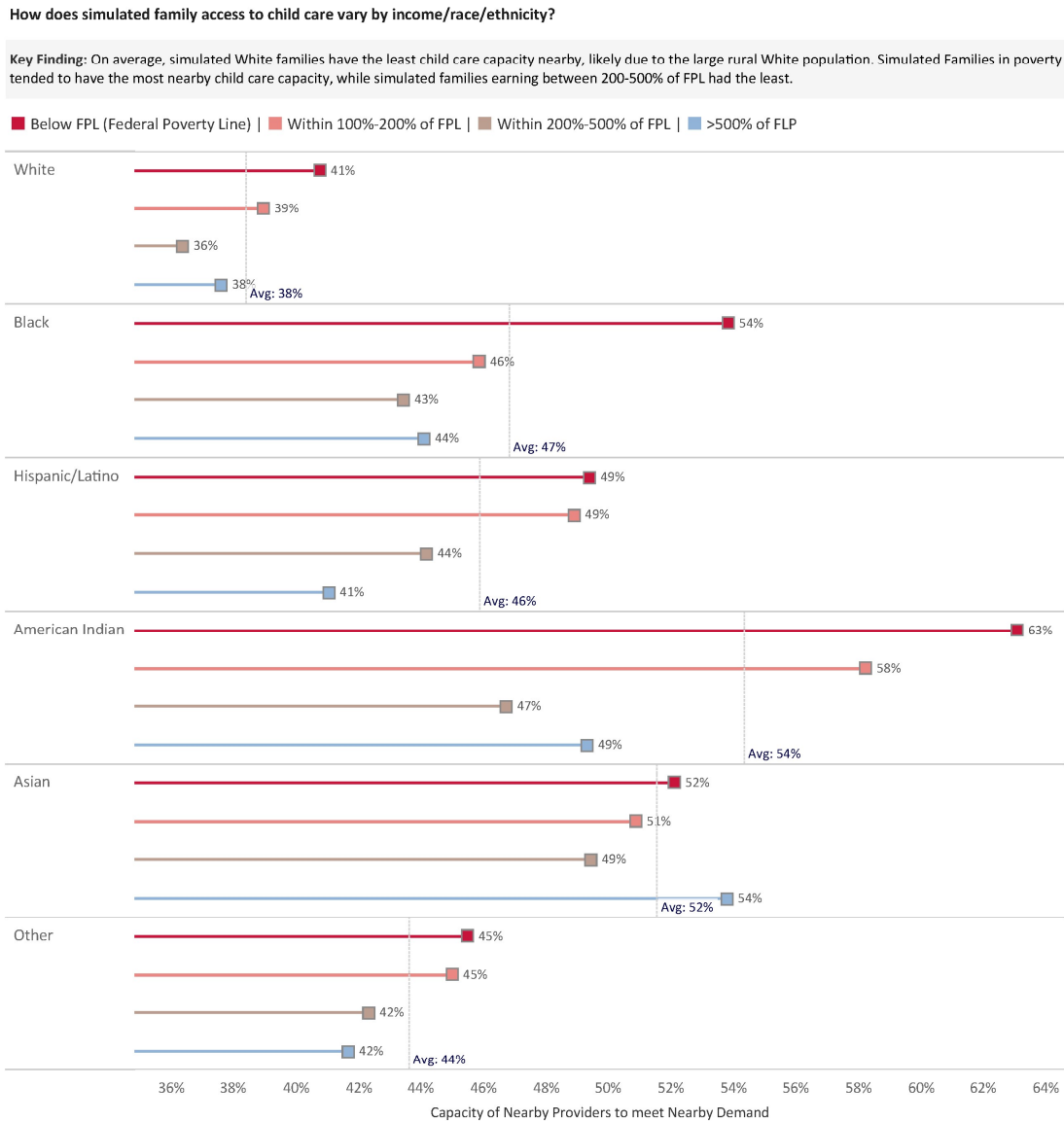
In Spokane County, as illustrated in Figure 37, the analysis found that child care deserts were generally located in suburban and rural areas. For families living in Spokane County, providers located within a 20-minute drive time can only meet 42% of the potential demand of nearby families. Out of approximately 23,000 families with young children in Spokane County, as illustrated in Table 21, about 6,900 (30%) live in child care deserts with an inadequate supply of access.

Figure 37. Families Living in Child Care Deserts – Spokane County



The analysis also examined how access to child care varies by family income, race and ethnicity. As illustrated in Figure 38, on average, white families have the lowest levels of child care capacity nearby. Families at or below the federal poverty level tend to have the highest levels of child care capacity nearby compared to families with incomes between 200% and 500% of the federal poverty level that have the lowest levels of access. The Child Care Industry Insights Dashboard provides detailed visualizations of how access varies by family, income, race and ethnicity for each county.

Figure 38. How Family Access Varies by Income, Race and Ethnicity Statewide



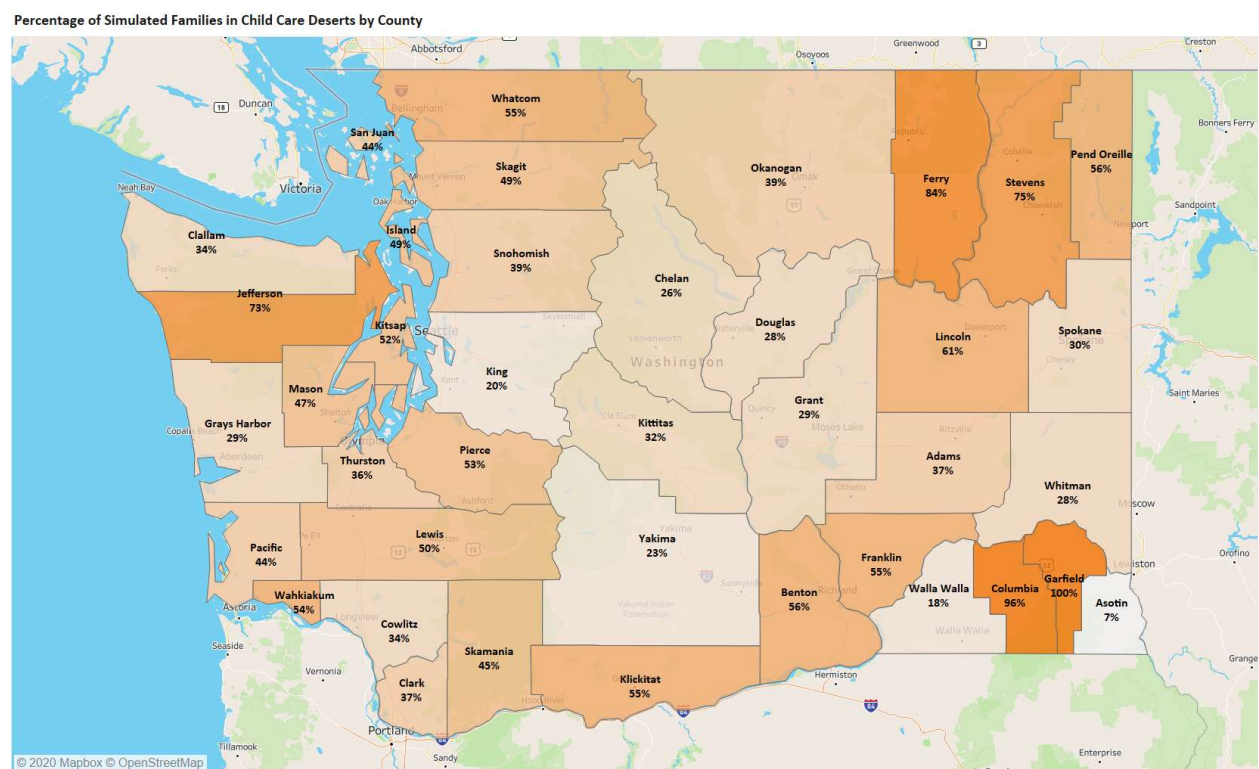
The analysis also examined the percentage of families in each county that live in child care deserts. On average, as illustrated in Table 21, approximately 118,000 families (35%) with young children across the state live in a child care desert where they have an inadequate supply of child care. When examined at the county level, as illustrated in Table 21 and in Figure 39, there are 15 counties in which 50% or more of families live in a child care desert.

Table 21. Number of Families in Child Care Deserts and Estimated Capacity Needed by County

County	Families	Families with Inadequate Supply	Percent with Inadequate Supply	Estimated Additional Capacity Needed	Estimated Center Capacity Needed	Estimated Family Child Care Capacity Needed
Adams	1,364	500	37%	200	160	40
Asotin	688	48	7%	20	20	-
Benton	10,232	5,716	56%	2,340	1,870	470
Chelan	2,992	772	26%	320	250	60
Clallam	2,636	900	34%	370	300	70
Clark	21,236	7,892	37%	3,240	2,590	650
Columbia	96	92	96%	40	30	10
Cowlitz	4,608	1,568	34%	640	510	130
Douglas	2,084	584	28%	240	190	50
Ferry	232	196	84%	80	60	20
Franklin	5,096	2,788	55%	1,140	910	230
Garfield	100	100	100%	40	30	10
Grant	5,360	1,564	29%	640	510	130
Grays Harbor	2,512	732	29%	300	240	60
Island	3,628	1,780	49%	730	580	150
Jefferson	716	520	73%	210	170	40
King	100,344	19,884	20%	8,150	6,520	1,630
Kitsap	11,884	6,180	52%	2,530	2,030	510
Kittitas	1,828	580	32%	240	190	50
Klickitat	696	380	55%	160	120	30
Lewis	3,228	1,612	50%	660	530	130
Lincoln	348	212	61%	90	70	20
Mason	2,228	1,052	47%	430	350	90
Okanogan	1,964	768	39%	310	250	60
Pacific	632	276	44%	110	90	20
Pend Oreille	440	248	56%	100	80	20
Pierce	41,536	21,812	53%	8,940	7,150	1,790
San Juan	468	204	44%	80	70	20
Skagit	5,800	2,824	49%	1,160	930	230
Skamania	352	160	45%	70	50	10
Snohomish	36,360	14,300	39%	5,860	4,690	1,170
Spokane	23,028	6,864	30%	2,810	2,250	560
Stevens	1,528	1,148	75%	470	380	90
Thurston	13,144	4,732	36%	1,940	1,550	390
Wahkiakum	156	84	54%	30	30	10
Walla Walla	2,380	432	18%	180	140	40
Whatcom	8,460	4,648	55%	1,910	1,520	380
Whitman	1,248	352	28%	140	120	30
Yakima	14,944	3,380	23%	1,390	1,110	280
Total	336,576	117,884	35%	48,310	38,640	9,680

In order to eliminate the child care deserts in every county, Washington would need expand capacity to serve an estimated 48,310 additional children, as illustrated in Table 21. The 117,884 families that live in areas with inadequate child care supply have an estimated 161,000 children across the state. To estimate the additional capacity needed to serve those children, the analysis used the preferences for child care arrangements derived from the parent survey conducted as part of this study. Approximately 30% of parents indicate that they prefer some type of care in the regulated market, such as a licensed child care program, a child care center or a program located in a school. After reviewing survey questions on both current child care arrangements and child care preferences, it was assumed that 24% of parents would prefer child care centers and 6% would prefer family child care homes. These estimates were then used to estimate the total additional child care capacity needed for parents who may be using other types of care, but would prefer care in the regulated market. The results of the analysis are broken out by county in Table 21, which shows that the child care industry would need the capacity to serve 38,640 additional children from birth to age five in child care centers and 9,680 children in family child care homes to eliminate the child care deserts and meet the child care provider preferences of parents.

Figure 39. Percentage of Families Living in Child Care Deserts by County



The Child Care Industry Insights Dashboard can provide a tool to support Washington in identifying areas in which additional investments may be needed in order to expand existing child care capacity to meet family demand and reduce child care deserts. As shown in Table 21, about 118,000 families with 161,000 children birth to age five live in areas considered child care deserts. The counties that were found to have the largest numbers of children living in child care deserts can be compared to the needs identified in previous capacity studies to inform target

areas and strategies for expanding access (Department of Children Youth and Families, 2019; Washington State Department of Early Learning, 2016).

In addition to facing access barriers that are related to capacity, families may also face barriers related to affordability that may alter the child care decisions that they make. Examining the proportion of income that families would have to expend for various types of care can provide insights into the challenges that they face in finding affordable care options that fit within their family budgets. When formal child care costs exceed affordability, parents may be left to consider alternative arrangements in the informal child care market.

According to the Census Bureau, the median family income of a married couple with children under 18 in Washington ranges from a high of approximately \$140,000 in King County to a low of approximately \$61,000 in Okanogan County (U.S. Census Bureau, 2018). Based on the 2018 Child Care Market Rate Survey, the median price of full-time care in a center ranges from a high of about \$19,000 for infant care and \$15,000 for preschool per year in King County to a low of about \$9,500 for infant care and \$8,200 for preschool in multiple counties that are mostly rural. The median price of full-time care in a family child care home ranges from a high of about \$14,500 for infant care and \$12,000 for preschool per year in King County to a low of about \$9,200 for infant care and \$7,400 for preschool in multiple counties that are mostly rural.

To illustrate the affordability of care across different counties, Tables 22 and 23 show the portion of income that a family at the median income level would have to pay for full-time infant care and full-time preschool care at the median market price in center and family child care settings. More detailed data on child care prices and family incomes are located in Tables F.4 and F.5 in Appendix F. The maps in Figures 40 through 43 show how affordability varies by county.

Affordability is the greatest challenge for center-based care for two-parent families in Island, San Juan and Skagit counties, where families would need to spend 20% or more of their income to purchase full-time care for one infant and 14% to 15% of income for full-time care for one child of preschool age at the median market price. Family home child care is somewhat less expensive statewide, with affordability the most challenging in Columbia, Ferry, Island, Okanogan and San Juan counties where families at the median income level would need to spend 15% to 17% of income to purchase full-time care for one infant at the median market price and 11% to 14% for one child of preschool age. Families that have an infant and a child of preschool age in the least affordable counties could spend as much as 35% of income for full-time care in center-based settings and 29% for family child care.

Affordability is likely a challenge for single parents earning at the median income level in all counties for all types of care. For those seeking center-based care for infants, the percent of income required at the median market price ranges from 17% of income in Columbia County to 89% in Island County. For center-based preschool, the percent of income required ranges from 13% to 63% in the same counties. For mothers seeking infant care in family child care homes, the income required ranges from 15% in Columbia County to 65% in Island County. For those seeking preschool care in family child care homes, the percent of income required ranges from 13% to 57% in the same counties. Single mothers with an infant and a child of preschool age in the least affordable counties would have to spend more than 150% of their income for full-time care in center-based settings and more than 120% for family child care.

Table 22. Percent of Two-Parent Family's Income Required for Full-Time Care at Median Price

County	Infant Center	Preschool Center	Infant Family Home	Preschool Family Home
Adams	15%	13%	14%	12%
Asotin	14%	12%	14%	11%
Benton	12%	9%	10%	9%
Chelan	12%	11%	12%	10%
Clallam	15%	12%	11%	10%
Clark	13%	10%	10%	8%
Columbia	17%	13%	15%	12%
Cowlitz	15%	11%	11%	9%
Douglas	13%	11%	13%	10%
Ferry	15%	13%	15%	12%
Franklin	14%	11%	13%	11%
Garfield	12%	10%	11%	9%
Grant	14%	12%	14%	11%
Grays Harbor	19%	14%	14%	12%
Island	21%	15%	15%	14%
Jefferson	18%	13%	13%	11%
King	14%	11%	10%	9%
Kitsap	14%	10%	11%	9%
Kittitas	13%	10%	11%	9%
Klickitat	15%	11%	11%	9%
Lewis	18%	14%	13%	11%
Lincoln	12%	10%	11%	9%
Mason	18%	14%	13%	11%
Okanogan	16%	14%	15%	12%
Pacific	17%	13%	13%	11%
Pend Oreille	12%	11%	12%	9%
Pierce	14%	11%	12%	10%
San Juan	20%	14%	15%	13%
Skagit	20%	14%	14%	13%
Skamania	15%	11%	11%	9%
Snohomish	15%	10%	11%	9%
Spokane	15%	11%	11%	9%
Stevens	12%	10%	12%	9%
Thurston	14%	11%	10%	9%
Wahkiakum	16%	12%	12%	10%
Walla Walla	12%	11%	12%	10%
Whatcom	17%	12%	13%	11%
Whitman	12%	11%	12%	10%
Yakima	15%	13%	14%	11%

Table 23. Percent of Single Mother's Income Required for Full-Time Care at Median Price

County	Infant Center	Preschool Center	Infant Family Home	Preschool Family Home
Adams	58%	50%	56%	45%
Asotin	29%	25%	28%	23%
Benton	38%	30%	33%	28%
Chelan	29%	25%	28%	22%
Clallam	59%	44%	44%	37%
Clark	38%	29%	28%	24%
Columbia	17%	13%	15%	13%
Cowlitz	64%	48%	48%	40%
Douglas	37%	32%	36%	29%
Ferry	39%	34%	38%	30%
Franklin	42%	33%	37%	31%
Garfield	41%	35%	40%	32%
Grant	42%	37%	41%	33%
Grays Harbor	61%	46%	45%	38%
Island	89%	63%	65%	57%
Jefferson	49%	37%	36%	31%
King	47%	38%	36%	30%
Kitsap	45%	34%	36%	30%
Kittitas	28%	22%	24%	21%
Klickitat	64%	48%	47%	40%
Lewis	56%	42%	41%	35%
Lincoln	40%	35%	39%	31%
Mason	63%	47%	47%	39%
Okanogan	44%	38%	43%	35%
Pacific	63%	47%	47%	39%
Pend Oreille	31%	27%	30%	24%
Pierce	42%	31%	34%	28%
San Juan	65%	46%	47%	42%
Skagit	57%	41%	42%	37%
Skamania	68%	52%	51%	43%
Snohomish	45%	32%	33%	29%
Spokane	43%	33%	32%	27%
Stevens	48%	41%	47%	37%
Thurston	40%	30%	30%	25%
Wahkiakum	49%	37%	37%	31%
Walla Walla	36%	31%	35%	28%
Whatcom	56%	40%	41%	36%
Whitman	34%	29%	33%	26%
Yakima	43%	38%	42%	34%

Figure 40. Percent of Two-Parent Family Income Spent on Center-Based Care for Preschool

Percentage of Two-Parent with Children Family Income Spent on Preschool Center Care

Percentage of Family Income Spent on Child Care

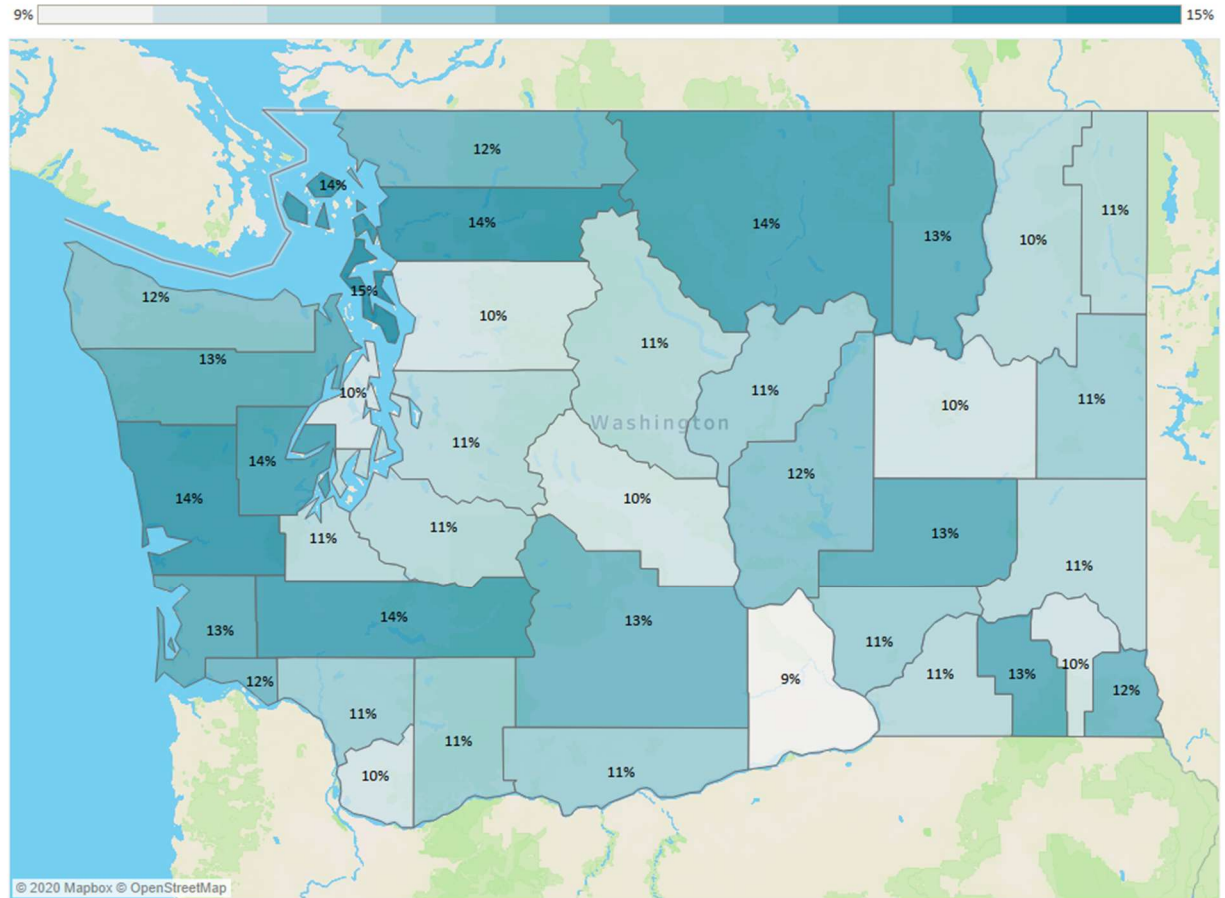


Figure 41. Percent of Single Mother's Income Spent on Center-Based Child Care for Preschool

Percentage of Single-Female with Children Family Income Spent on Preschool Center Care

Percentage of Family Income Spent on Child Care

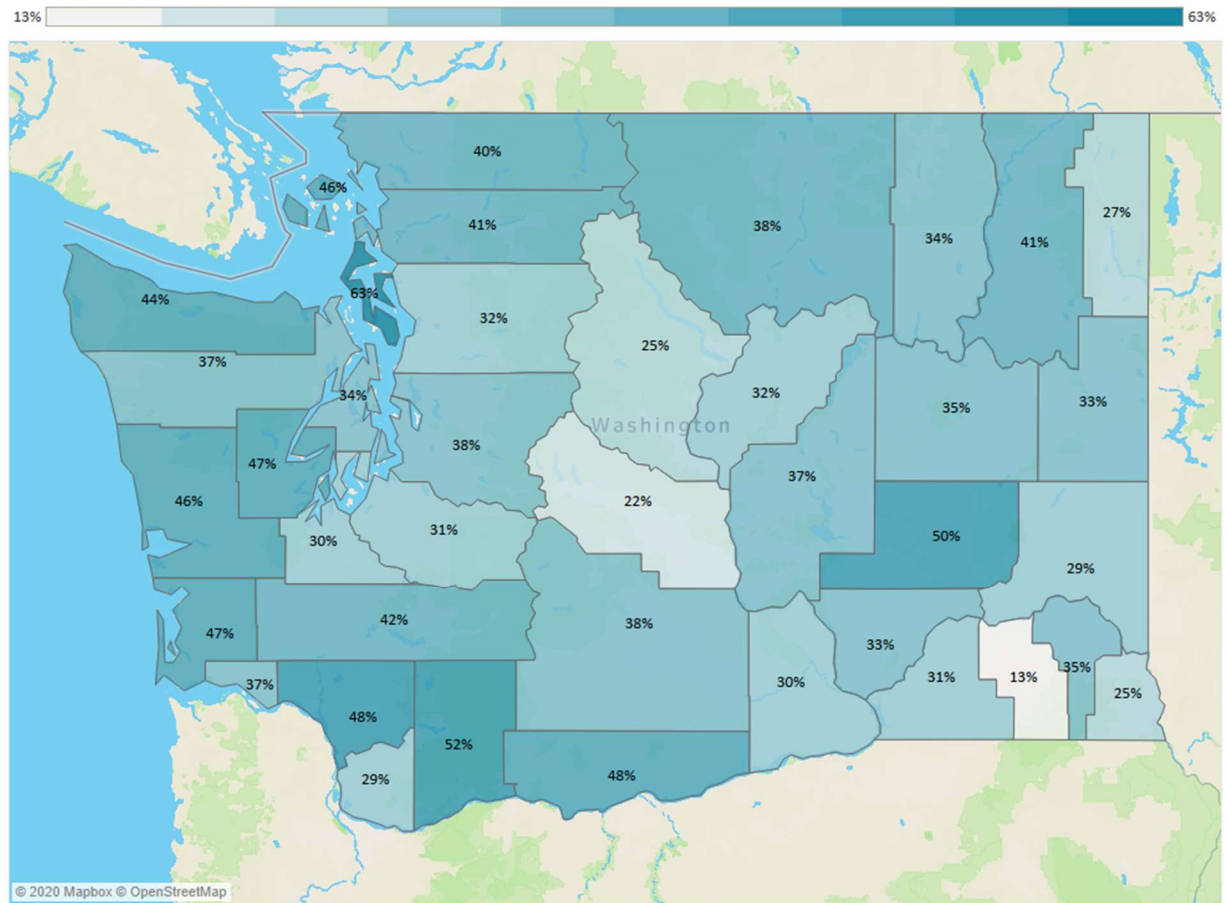
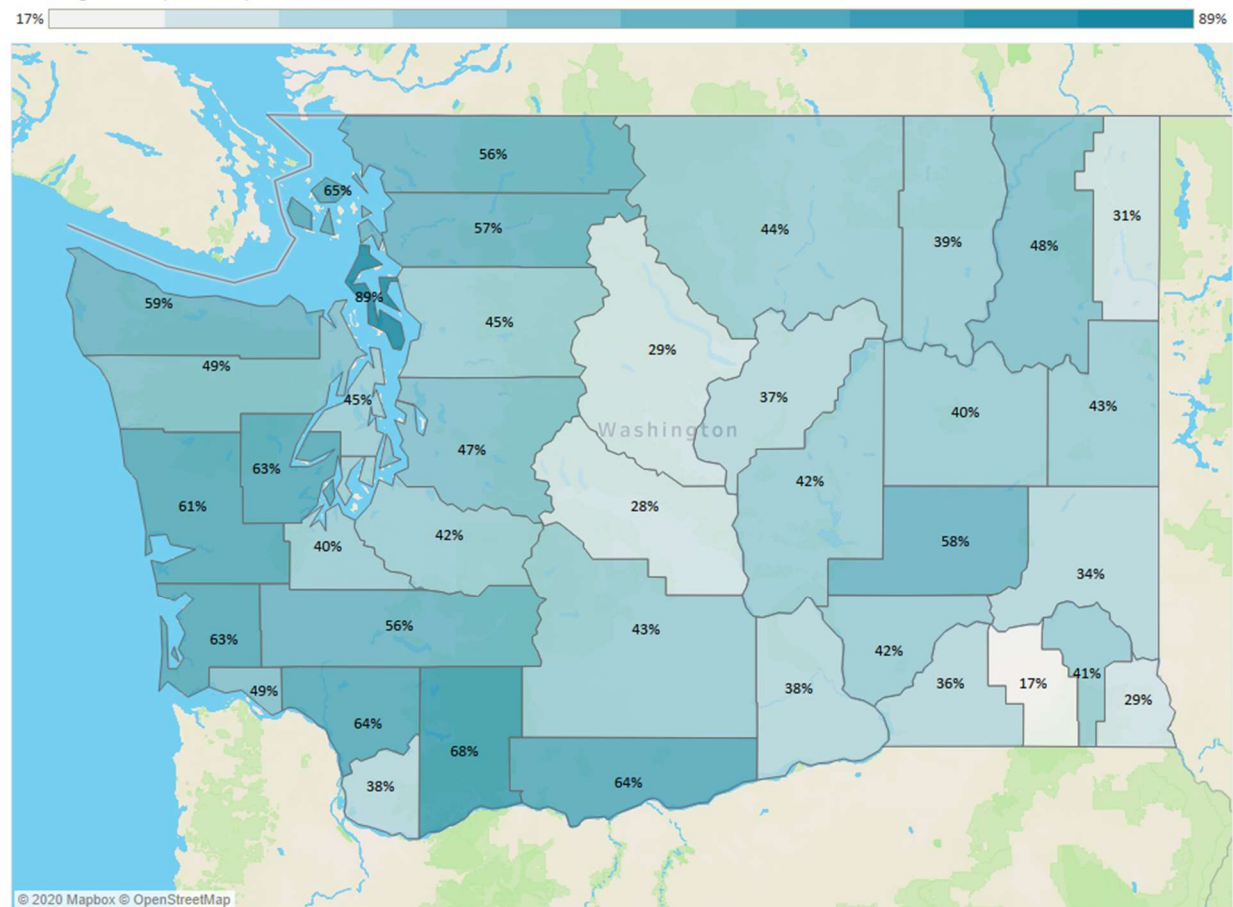


Figure. 43. Percent of Single Mother's Income Spent on Center-Based Care for Infant**Percentage of Single-Female with Children Family Income Spent on Infant Center Care**

Percentage of Family Income Spent on Child Care



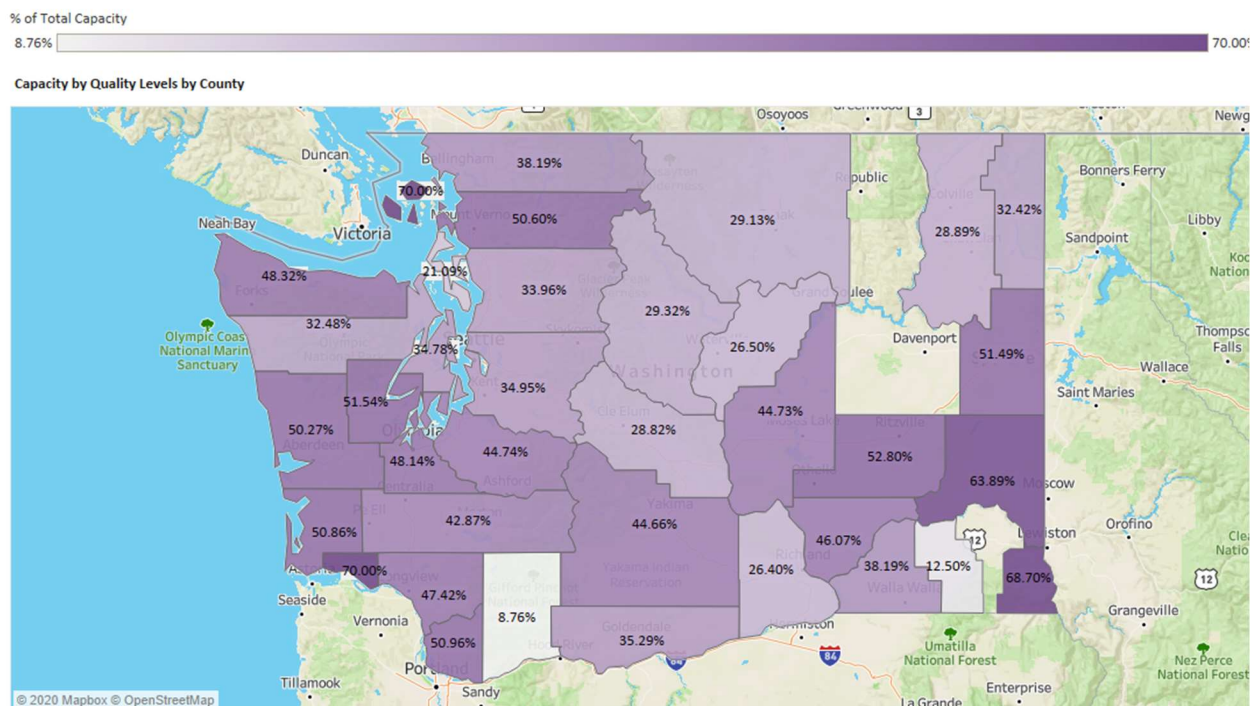
Parents typically consider multiple factors and face multiple barriers when they make decisions on how to provide care for their child, as detailed in both the literature review and parent surveys. The analysis of the supply of child care examined the extent to which child care providers in the formal market offer access to specific child care options that are of particular interest to parents and policymakers, including different forms of subsidy, higher quality care, access to infant care.

A large and growing body of research documents the importance of the first five years of children's lives for their cognitive, social, physical, behavioral, and emotional development, and the importance of providing children with access to high-quality early childhood options. The experiences early in the lifespan have important implications for their school readiness and educational outcomes, as well as their lifelong health and well-being. (Center on the Developing Child, 2007, 2010; Heckman, 2007; Karoly, 2019). As highlighted in the literature review on child care decision-making and further detailed in the parent and employee surveys conducted as part of this study, parents across the nation and in Washington consider program quality an important factor in selecting a care option for their child. With this in mind, the analysis examined the extent to which families have access to programs at the highest levels of Early

Achievers. Additional analysis of access to Head Start and ECEAP, which also require providers to meet higher quality standards, is presented later in the report.

Statewide, based on data from DCYF, providers at Early Achievers levels three and higher have the capacity to serve approximately 90,000 children (41% of total capacity of regulated supply). Providers at lower levels of Early Achievers or not participating in Early Achievers have the capacity to serve approximately 127,000 children (59% of total capacity of regulated supply). The highest percentage of child care capacity at these levels of quality is 70% in San Juan and Wahkiakum counties. All counties had at least 25% of capacity at this level of quality, except for Island (21%), Columbia (13%) and Skamania (9%). There were no providers at this level of quality in Ferry, Garfield and Lincoln counties.

Figure. 44. Percent of Child Care Capacity at Early Achievers Level 3 or Higher by County



The analysis also examined the proximity of families to providers that are at higher levels of quality. As shown in Figure 45, within a 10-minute drive, 70% of families can access at least one provider at Early Achievers levels four and five. When extended to a 20-minute drive time, the percent of families that can access at least one provider at these quality levels increases to 93%. At the county level, as shown in Table F.1 in Appendix F, the percentage of families that can access providers that participate in these programs varies considerably and may bear further examination. Within the 10 counties that have the largest numbers of families with young children (King, Pierce, Snohomish, Spokane, Clark, Yakima, Thurston, Kitsap, Benton and Whatcom), access to at least one provider at these quality levels within a 10-minute drive ranges from 50% to 86%. Among the counties with fewer families that are typically living in more rural environments, the percent of families able to access these providers within a 10-minute drives tends to be much lower. When the drive time is extended to 20 minutes, 85% to 100% of

families in the 10 largest counties have access to at least one provider at these quality levels, while families in smaller and more rural counties still tend to have significantly fewer families with access within this drive time.

Research shows that when families have access to subsidy, they are more likely to use their preferred type of child care and more like to select options that they perceive as higher quality. The analysis examined three programs that provide parents with access to publicly subsidized care options, including Working Connections, Head Start and ECEAP. Statewide, 998 center-based providers (40%) and 1,762 family child care providers (56%) participate in Working Connections, based on a data snapshot provided by DCYF that shows participation in February of 2020. Additionally, 465 center-based providers (19%) and 8 family child care providers (0.3%) participate in Head Start, and 569 center-based providers (23%) and 15 family child care providers (0.5%) participate in ECEAP. The analysis examined the proximity of families to providers that participate in these programs. As shown in Figure 38, within a 10-minute drive, 78% of families can access at least one provider that accepts subsidies, 71% can access at least one provider participating in Head Start and 86 can access at least one provider participating in ECEAP. When extended to a 20-minute drive time, the percent of families that can access at least one participating provider increases respectively to 85% for subsidy, 84% for Head Start and 89% for ECEAP. At the county level, as shown in Tables F.3, the percentage of families who can access providers that participate in these programs varies considerably and may bear further examination. Within the 10 counties that have the largest numbers of families with young children (King, Pierce, Snohomish, Spokane, Clark, Yakima, Thurston, Kitsap, Benton and Whatcom), access to at least one provider that accept subsidies within a 10-minute drive ranges from 87% to 99%, and ranges from 74% to 93% for those that are looking for a provider participating in Head Start and 57% to 95% for those that are looking a provider participating in ECEAP. Among the counties with fewer families that are typically living in more rural environments, the percent of families able to access these providers within a 10-minute drives tends to be lower. When the drive time is extended to 20 minutes, families in the 10 largest counties nearly always have at least 1 provider within the drive that participates in one of the subsidy programs, while families in smaller and more rural counties still tend to fewer families that can access providers within this drive time.

In general, families tend to face challenges in finding care options for infants. The results of the parent listening sessions and the parent surveys that were part of this study also show this to be the case in Washington. The analysis examined the number of providers that are licensed provide care for infants and examined the proximity of families to these providers. It should be noted that not all providers that are licensed to provide infant care actually provide care for children that age. As a result, the access estimates may be overstated.

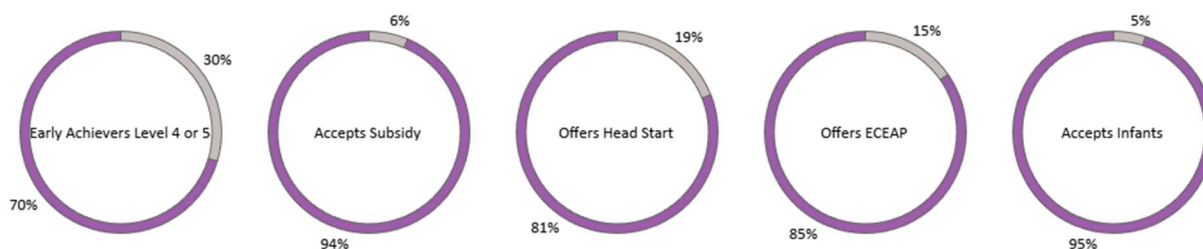
Statewide, there are 809 center-based providers (33%) and 2,824 family child care providers (90%) that are licensed to care for infants. As shown in Figure 44, within a 10-minute drive, 95% of families can access at least one provider that is licensed to care for infants. When extended to a 20-minute drive time, the percent of families that can access at least one provider that is licensed to care for infants increases to 99%. Within the 10 counties that have the largest numbers of families with young children (King, Pierce, Snohomish, Spokane, Clark, Yakima, Thurston, Kitsap, Benton and Whatcom), access to at least one provider that can care for infants within a 10-minute drive ranges from 90% to 99%. Among the counties with fewer

families that are typically living in more rural environments, the percent of families able to access these providers within a 10-minute drives tends to be much lower. When the drive time is extended to 20 minutes, nearly all families in the 10 largest counties have access to at least one provider at can care for infants, while families in smaller and more rural counties still tend to have significantly fewer families with access within this drive time.

Figure 45. Drive Time to Different Child Care Options Statewide

Percentage of simulated families that have at least 1 provider within 10 minutes that is...

Yes | No



Percentage of simulated families that have at least 1 provider within 20 minutes that is....

Yes | No

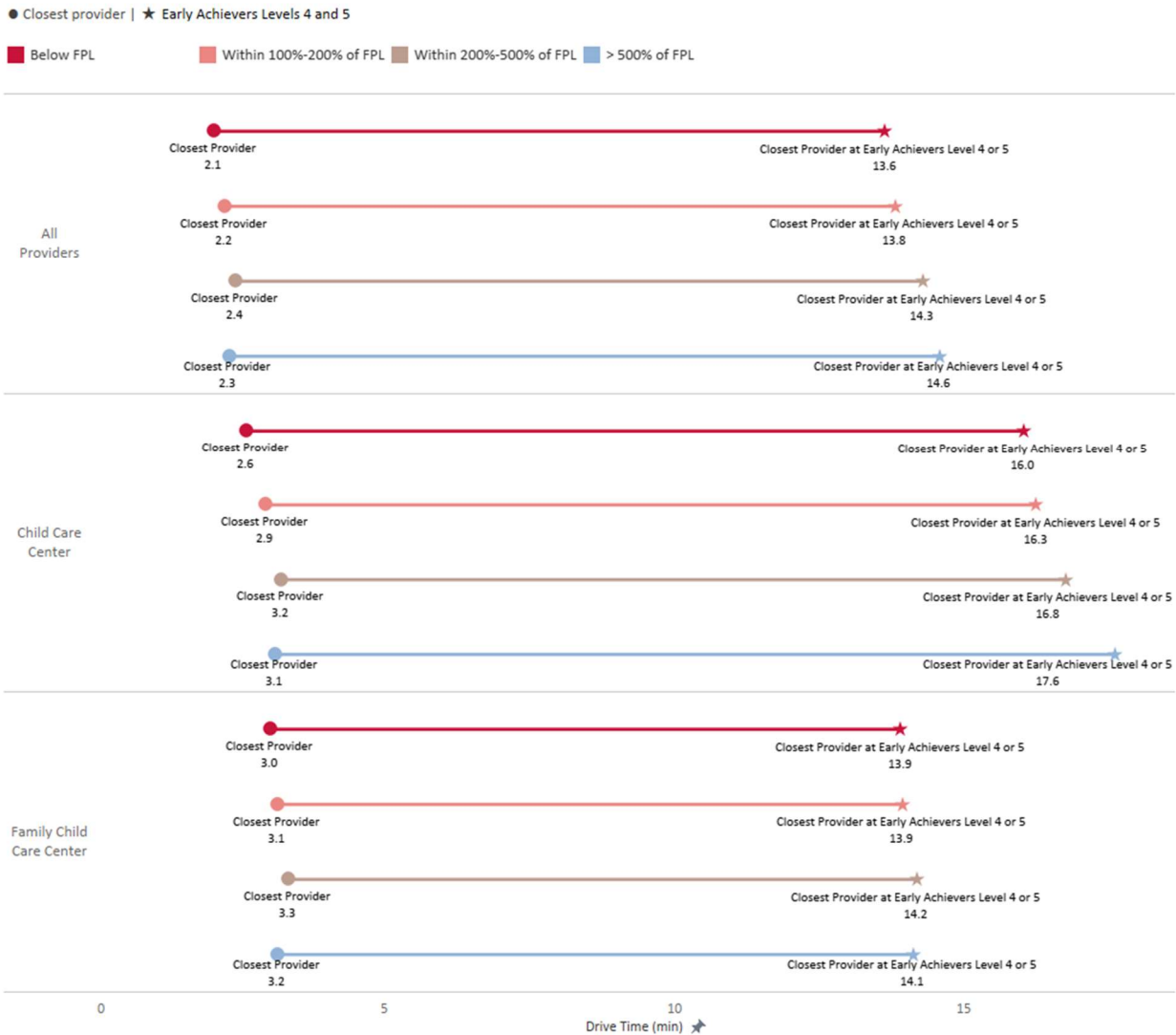


The analysis also examined drive times to the nearest provider and the nearest provider at Early Achievers levels four and five. Research shows that parents prefer to select providers that are nearby their home. As illustrated in Figure 46, most families in the state have at least one child care provider located within a five-minute drive. However, families generally must drive much further to find a program at levels four or five in Early Achievers. The drive times to reach providers tend not to vary by income, except that the drive time to reach a child care center at the highest quality levels increases slightly as family income increases. More detailed breakouts of drive times by county can be provided by the Child Care Industry Insights Dashboard.

Figure 46. Drive Time to Nearest Provider and Nearest High-Quality Provider Statewide

How does the average drive time to the nearest provider and nearest high-quality provider vary by provider type and family income?

Key Finding: Most simulated families had at least one provider within a 5 minute drive. However, simulated families generally had to drive much farther to find a program with an Early Achievers rating of 4 or 5.



3.4 Informal Child Care Market for Young Children

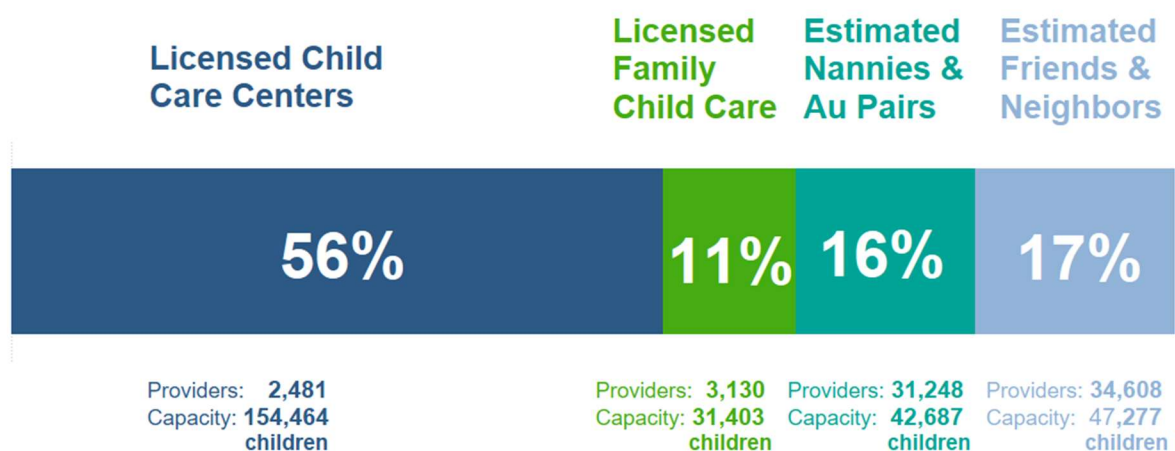
The analysis summarized above examined only the supply and demand for care in the regulated child care market, which includes licensed family child care homes, licensed child care centers, and school-based preschool programs offered through ECEAP. However, families may also pay for care that is provided outside of the regulated market, including paying friends or neighbors to provide care or a nanny or au pair. Obtaining data to estimate the supply of this type of care is challenging because it is delivered outside of the regulated market and no private or governmental entity gathers data on the providers delivering care. DCYF has provided data that show approximately 2,000 providers of this type providing care to children who receive child care assistance through Working Connections. However, the data do not capture the number of

families who are privately paying for care from providers who work outside of the regulated market.

To estimate the supply of care that is available in the unregulated market, the analysis examined data from the parent survey that was conducted as part of this study to identify what portion of families indicated using friends, neighbors, nannies and au pairs. The estimate of the supply assumed that families paid for the care provided in these settings. The estimate excluded care provided by family members, based on the assumption that the care was more likely provided at no cost.

Among the families with young children responding to the survey, 10% reported using friends or families and an additional 9% reported using au pairs or nannies to care for their children. The estimate of the supply of care in the unregulated market assumes that families in the broader population in Washington will use these types of care at the same rates reported in the parent survey. Based on census data, there are 336,000 families with 459,000 children from birth to age five in the state (U.S. Census Bureau, 2018). To determine the number of providers in the unregulated market, the estimate multiplied the total number of families in the state by the rate of usage for the type of care. To determine the number of children receiving care from these providers, the estimate multiplied the total number of young children in the state by the rate of usage for the type of care. This approach produced an estimate of 34,608 friend and neighbor providers (336,000 families multiplied by 10%) who are caring for 47,277 children (459,000 children multiplied by 10%). Additionally, it produced an estimate of 31,248 nannies and au pairs (336,000 families multiplied by 9%) who are caring for 42,687 children. The graph in Figure 47 shows the supply of child care, inclusive of these estimates of the care provided in the unregulated market.

Figure 47. Supply of Care for Children Birth to Age Five in Formal and Informal Child Care Markets



4. Supply and Demand for School-Age Child Care

4.1 Demographic Characteristics of Washington Families with School-Age Children

There are an estimated 658,000 children ages 5 through 12 in Washington. The demographic breakdowns by income, race and ethnicity at the statewide level are illustrated in Figures 48 and 49 below.

Figure 48. Incomes of Families with School-Age Children

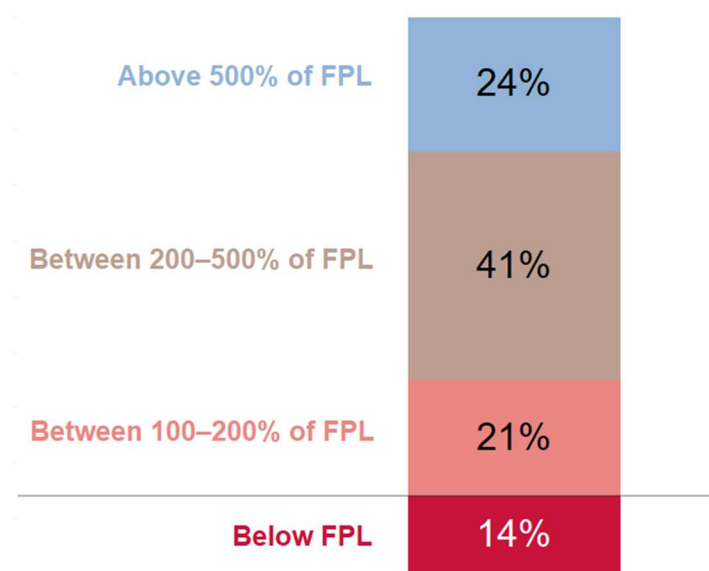
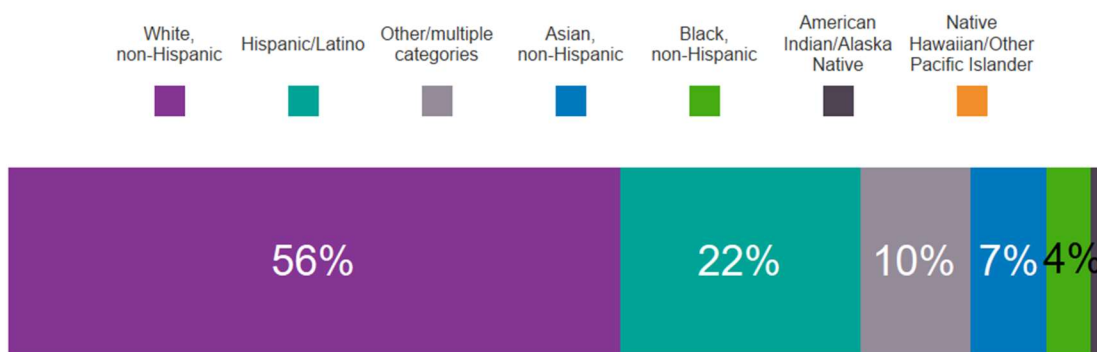


Figure 49. Race and Ethnicity of Families with School-Age Children



4.2 Supply and Demand for Child Care for School-Age Children

School-age child care supply can be more difficult to analyze than the supply and demand of child care for children under five or six years old. In some respects, these services are quite similar, in that they provide supervision and care for children while parents are at work, getting job training, in school, or otherwise busy. However, since school-age children are already in school for several hours a day, usually this type of care is supplemental, either before or after the school day. This care can be on-site at a school, in a community-based organization, or at a private program such as a tutoring program. Some programs are not in the licensing data but function as school-age care, such as summer camps, enrichment activities after school, or civic or outdoor scouting organizations.

This leads to the major limitation in studying the supply of school-age care, which is that the capacity is only known for programs that serve exclusively school-aged children. These before- and after-care programs are included in the DCYF licensing database, hence they are the subject of this study. But we know from the state's 2018 Child Care Market Rate Survey Report that child care centers and family child care homes report having capacity for school-age children, in addition to the capacity to serve younger children (Washington Department of Early Learning, 2018). Across the entire state, the survey found that 32% of center capacity and 26% family child care capacity was used to provide care for school-age children across the state. However, the survey did not disaggregate the availability of school age care in these settings at the regional, county or school district levels. Therefore, this analysis is cautious about estimating the capacity of school-age care at the local level using the data from the 2018 survey and does not include the potential capacity of these programs in the estimates of the supply of care for school-age children. Based on the Parent Survey conducted as part of this report, approximately 22% of parents report using licensed center-based care for children from age 5 through 9, and 7% report using this type of care for children from age 10 through 12. Additionally, 5% of parents report using family child care to provide care for children from 5 through 9, and 3% report using this type of care for children from age 10 through 12.

Additionally, the use of informal care in the unregulated market is much more common for school-age children. Since they are more physically and emotionally mature, parents are more comfortable using neighbors, friends, and family to watch their children before and after school, or during the summer. Based on the Parent Survey conducted as part of this study, the use of friends and neighbors ranges from 4% for children age 5 through 9 to 5% for children from age 10 through 12. Additionally, the use of a nanny or au pair ranges from 6% for children from age 5 through 9 to 4% for children from age 10 through 12.

The data that were available to study at a provider level were licensed school-age only child care programs, sometimes operated by the school district and other times operated by a vendor or non-profit community-based organization. DCYF data showed 569 such locations in the state, with an overall capacity to serve about 32,000 children from age 5 through 12 (Department of Children, Youth and Families, 2020). Since there are approximately 658,000 children in this age group across the state, this means there are more than 23 school-age children for each potentially available space among licensed school-age only child care programs (U.S. Census Bureau, 2018).

In order to understand the population-to-capacity of school-aged care across the state, this analysis compared the cumulative capacity of providers at the school district level. This is because, unlike in the private regulated market for child care for younger children, school-age care is often connected to one's school boundary zone. The programs were coded to a school district and then that capacity was compared against the enrollment of kindergarten through fifth graders as of the 2019-2020 school year. This enrollment data was downloaded from the public data portal of the Washington Office of the Superintendent for Public Instruction.

There were licensed school-age only programs in 89 of the state's 295 school districts (30% of districts). The map in Figure 50 shows the percentage of each school district's elementary school enrollment that could be served by the total capacity of the licensed school-age only programs within that district (not including the child care centers and family child care homes that may also have capacity to serve school-age children, since the portion of their capacity dedicated to this group is unknown). It is important to note that the map only shows data on the capacity and potential number of children for the districts in which there were licensed school-based programs.

As further illustrated in Table F.6, these proportions range from 20% in Seattle Public Schools to less than 2% of the enrollment in Bellevue and Issaquah School Districts, for example. Across all 89 school districts, there is enough capacity to serve approximately 8% of elementary school-age children. The availability of licensed school-age only child care does not seem to be directly associated with the size of a district's enrollment.

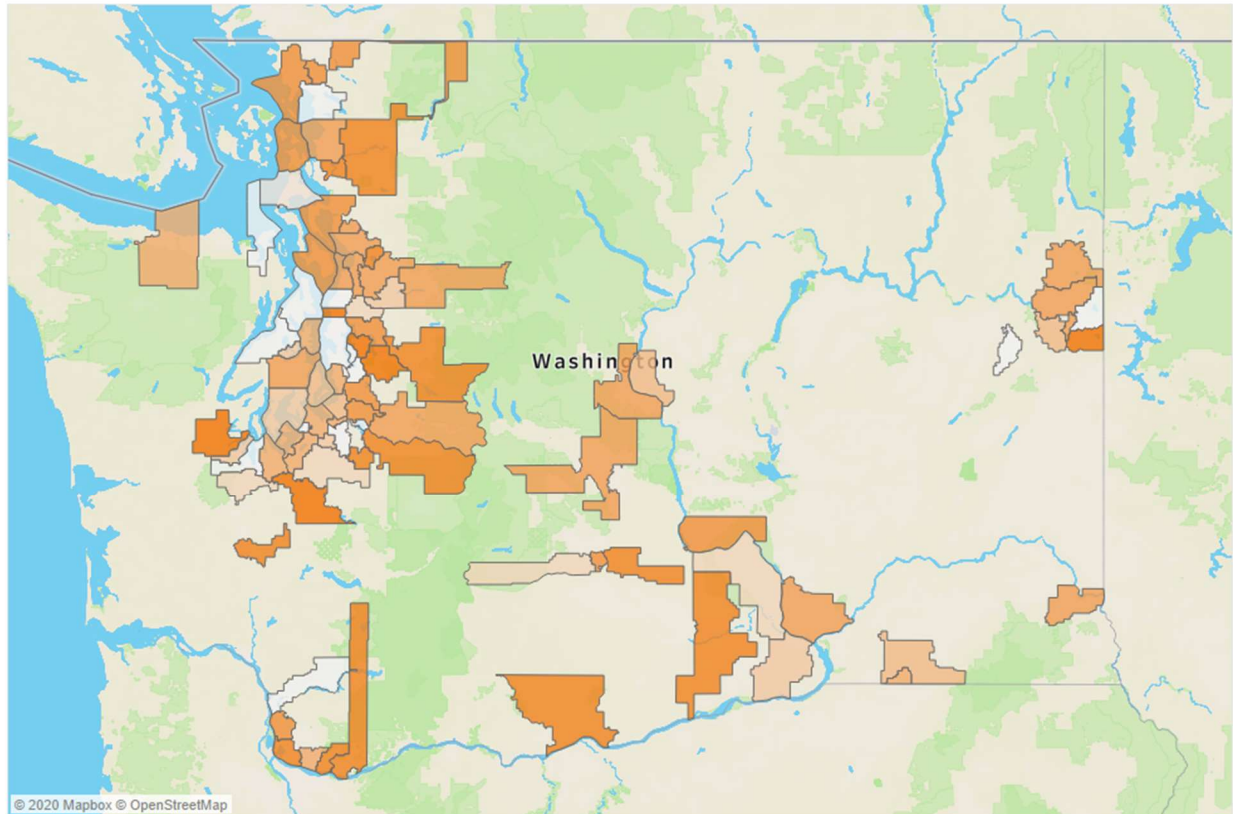
Figure 50. Percent of Children 5 through 12 Who Can Be Served Through School-Based Programs

Note: This map displays data only in school districts where there are licensed providers that only provide school-age care. Due to data limitations, it does not include data for providers that may serve multiple age groups.

Percent of Public School Enrollment that can be Served through Licensed School-Age Providers.



School Age Care



In addition to facing access barriers that are related to capacity, families may also face barriers related to affordability that may alter the child care decisions that they make. While school-age care is marked less expensive on an annual basis for most families, it may still be a barrier to access for some families. Examining the proportion of income that families would have to expend for various types of care can provide insights into the challenges that they face in finding affordable care options that fit within their family budgets. When formal child care costs exceed affordability, parents may be left to consider alternative arrangements in the informal child care market.

According to the Census Bureau, the median family income of a married couple with children under 18 in Washington ranges from a high of approximately \$140,000 in King County to a low of approximately \$61,000 in Okanogan County (U.S. Census Bureau, 2018). Based on the 2018 Child Care Market Rate Survey, the median price of school-age care in a center-based setting (if purchasing full-day care for 16 days per year when school is not in session) ranges from about \$450 to \$705 per week. The median price of full-time care in a family child care home (if purchasing full-day care for 80 days per year when school is not in session) ranges from about \$550 to \$710 per week.

To illustrate the affordability of care across different counties, Tables F.7 and F.8 show the portion of income that a family at the median income level would have to pay for full-time school-age care for the 16 weeks per year during which school is not in session at the median market price in center and family child care settings. Affordability is also illustrated in the maps shown in Figures 51 and 52 for two-parent families and Figures 53 and 54 for single mothers with school-age children.

Affordability is similar across counties for center-based and for family child care for two-parent families for school-age care, where families would need to spend between 2% and 4% of their income to purchase school-age care.

Affordability is likely a greater challenge for single mothers earning at the median income level in all counties for all types of care. For those seeking center-based care and family child care for school-age children, the percent of income required to purchase care at the median market price ranges from about 6% to 15% of income across counties.

Figure 51. Percent of Two-Parent Family Income Spent on Center-Based Care for School Age

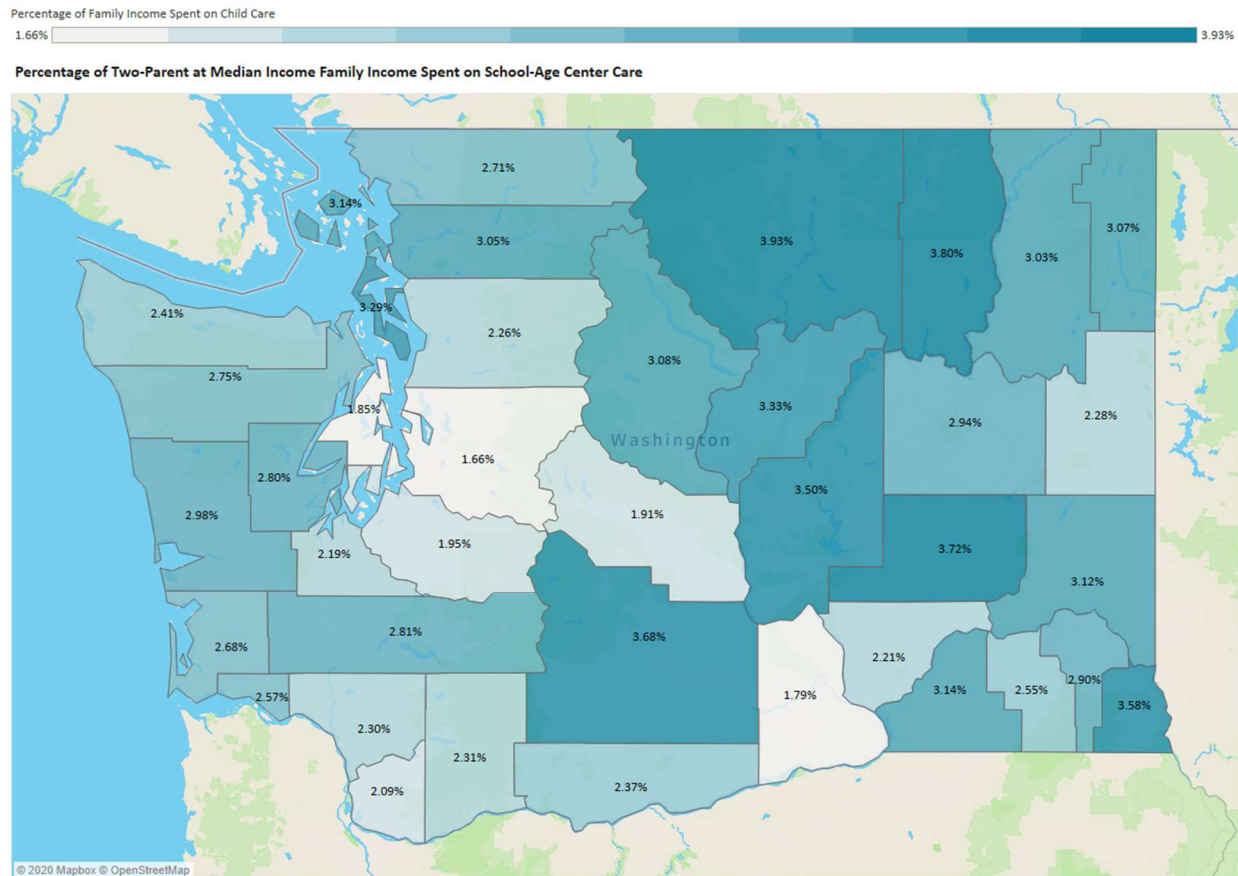


Figure 52. Percent of Two-Parent Family Income Spent on Family Child Care for School Age

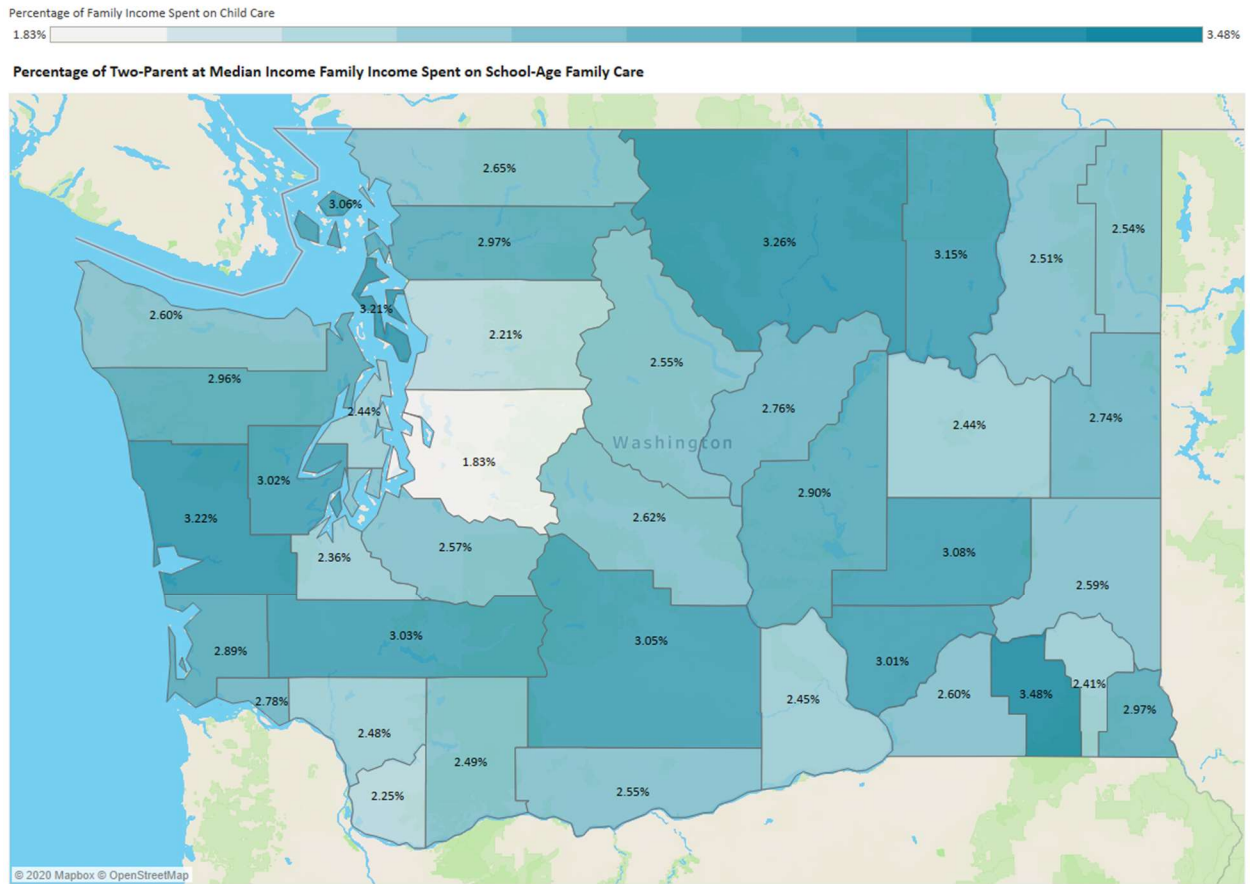
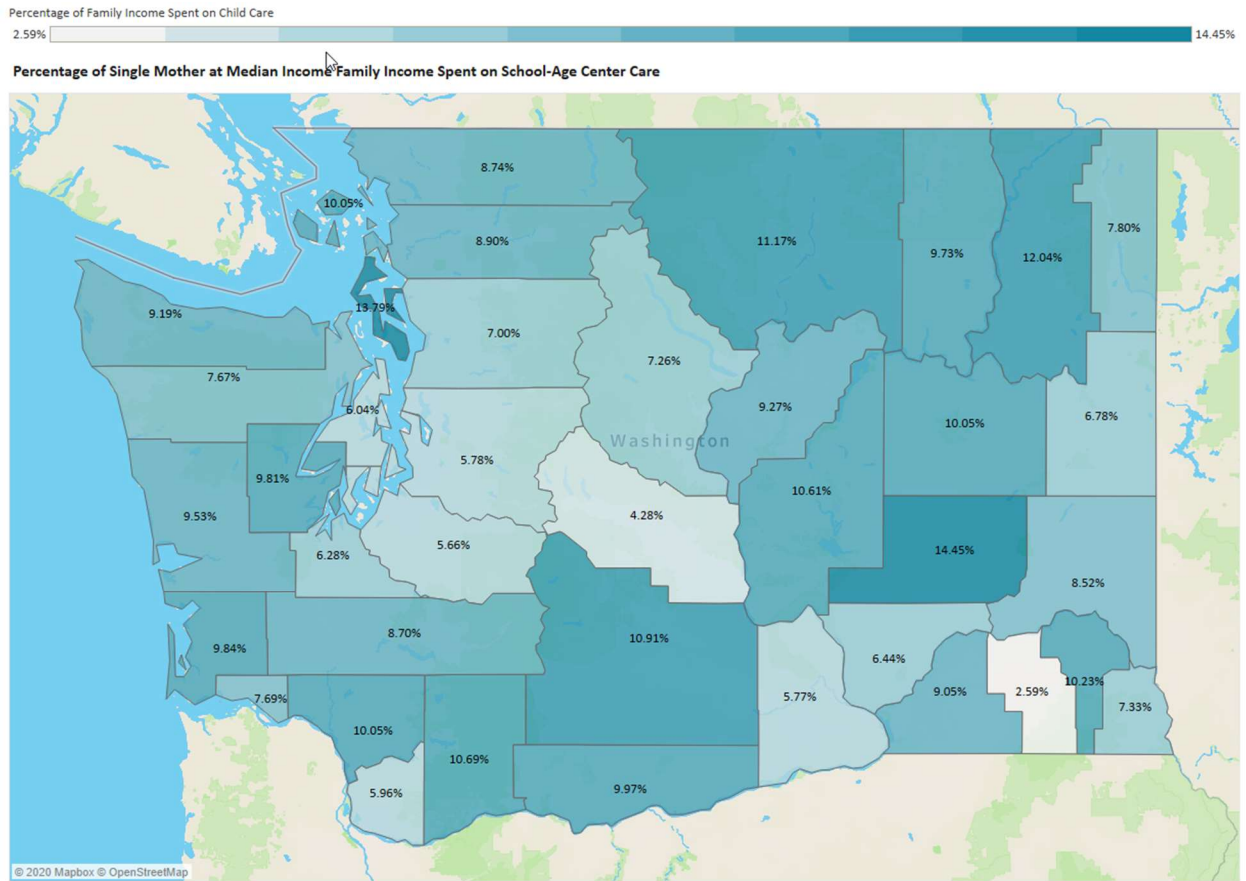


Figure 53. Percent of Single Mother's Income Spent on Center-Based Care for School Age



The Center for the Study of Child Care Employment estimates the size of the early childhood workforce in Washington at approximately 20,000. These estimates are based on occupational employment statistics from the Bureau of Labor Statistics, including child care workers, preschool teachers (excluding special education), preschool teachers (special education), and education administrators for preschool programs and child care centers. These data do not include the self-employed, although home-based child care assistants, who are employees, are likely included in the “child care worker” category (Center for the Study of Child Care Employment, 2018).

The Child Care Workforce Compensation Policy Analyses, which is part of the series of reports produced as a companion to the Child Care Industry Assessment, included an extensive analysis of data from the MERIT data system, Washington’s early childhood workforce registry. The analysis was based on a review of records for approximately 36,000 early childhood educators, as detailed in Appendix I, and examined demographic characteristics of the workforce, including job titles, race and ethnicity, languages spoken, age, educational attainment and certificate attainment. The analysis also examined variations in these characteristics by geographic regions, including Child Care Aware Region, county and zip code. Key highlights from the analysis include:

- Compared to other language groups, a much larger percentage of English/Somali and Spanish speakers (almost all) and a larger percentage of English/Spanish speakers (61 percent) have attained less than an associate degree.
- Compared to other racial/ethnic groups, a greater percentage of Hispanic/Latinos (64 percent) and Black/African Americans (63%) have attained less than an associate degree.
- Compared to other job categories, a larger percentage of family home assistant/aides (63 percent) and family home teachers/owners (77 percent) have attained less than an associate degree.
- Compared to other regions of the state, the Central Washington Region has the greatest percentage (68 percent) of educators who have attained less than an associate degree.
- When compared to other regions of the state, the Central Washington Region also has the greatest percentage of Hispanic/Latino educators (60 percent) and educators who speak English/Spanish or Spanish only
- The workforce is generally representative of the population of children across regions and in the surrounding communities in which early educators work, but each racial and ethnic category is underrepresented in at least some counties and zip codes, with those identifying as Pacific Islander or other race the most likely to be underrepresented.
- The portion of the workforce that has attained a bachelor’s degree or higher tends to increase as the income in the surrounding zip code increases. Likewise, the portion of the workforce that has attained less than an associate degree is much higher in zip codes with lower incomes than those with higher incomes. This presents possible inequities for children in communities with lower incomes, given the important link between quality and educational attainment.

The analysis should be updated as more education data are verified and the COVID-19 pandemic eases. However, the findings suggest that continuing and strengthening programs

and policies that: 1) provide access to, and success in, early childhood education associate degree programs, and 2) promote articulation between associate and bachelor's degree programs could greatly benefit Washington's early childhood workforce. By implementing a well-developed professional development plan concurrently with a salary initiative based on educational levels (Washington DCYF, 2019), the state can reduce the wage inequities endemic to those who lack access to higher education opportunities.

6. Impact of Pandemic on Supply and Demand

6.1 Overview of Pandemic Impact on Child Care

When reviewing the findings in this report, one must recognize that the snapshot data of the child care supply, and the assumptions made about the demand for services, were developed before the full impacts of the COVID-19 pandemic. This unprecedented event has, and will continue to have, significant impacts on both the supply and demand for child care.

As parents are furloughed, laid off, or otherwise ceasing work due to the COVID-19 pandemic, an analysis by the Minneapolis Federal Reserve found that overall demand for child care services has dropped by 25% to 40% compared to pre-pandemic levels (Grunewald, 2020). While these data were not specific to Washington State, it is likely that a similar drop in the demand for care is taking place across the state. Although child care providers in Washington were not ordered to close during the pandemic, many have closed temporarily due to reduced demand or out of health and safety concerns. While the overall supply and demand analysis produced in this report does not account for the impact of the pandemic, the report does present a snapshot of the impact on supply, later in this section.

The Minneapolis Federal Reserve explained how an already challenging situation for child care providers worsened due the pandemic, even though their services are typically in high demand. Child care businesses generally have a slim profit margin. It is rare for an owner or director of a child care business to have formal education in business practices (Grunewald, 2020). While these findings were not specific to any state, this lack of formal business training has been observed in Washington State, where child care licensing requirements focus on training and credentials in early childhood education rather than business administration. The Minneapolis Federal Reserve found that child care providers do not often work with traditional lenders, and consequently have limited access to cash reserves or credit lines. As a result, many child care businesses are unable to withstand a sharp decline in revenue. Additionally, providers also face significant cost increases that stem from implementing and maintaining the smaller child-to-staff ratios necessary to limit potential virus exposure for children and staff members. Providers now must also clean and sanitize more frequently. Following potential exposure to the virus by staff or children, providers may also need to close for days to disinfect. What was already a challenging business model is more difficult to manage with these added costs (Grunewald, 2020).

When the Minneapolis Federal Reserve published child care findings in late April 2020, an increase in the demand for child care for essential workers was noted despite a significant decrease in demand for child care services overall (Grunewald, 2020). Since then, child care demand has shifted as restrictions on business operations, gatherings and physical distancing

increased and decreased. Even in the early months of the pandemic, the Minneapolis Federal Reserve suggested that estimating demand for the near and longer-term future is challenging due to the complex, interrelated factors that inform these estimates. These factors include the number of jobs deemed essential, the number of parents in those jobs who need child care, and parents' child care preferences during the pandemic. The Federal Reserve Bank of Atlanta developed a mapping tool that estimates the number of health care workers and first responders who need child care by state and metropolitan area. Across Washington there are an estimated 236,000 of these frontline workers, including nurses, physicians, other medical professionals, firefighters, police officers, pharmacists, and laboratory technicians. An estimated 50,000 (21%) of these workers need child care (Federal Reserve Bank of Atlanta, 2020). Parental preferences for child care settings also influences demand. Parents may have greater access to care by families, friends, and neighbors who are unable to work. However, the ability to form or maintain these arrangements may be hampered by physical-distancing practices during stay-at-home orders and exposure risks for older adults and other high-risk populations (Grunewald, 2020).

6.2 Impact of Pandemic on the Supply of Child Care in Washington

This analysis presents an update on the child care supply statewide reflecting the latest open status for child care providers as of June 25, 2020, compared to pre-pandemic supply. This summary uses data from the Department of Children Youth and Families. It presents the findings from an analysis of the change in child care capacity by zip code and county, including findings and key policy considerations. This comparison excludes from both time periods a group of 779 providers that are exempt from licensing or with a COVID status was unknown at time of the update. That is, this analysis is an “apples to apples” comparison of pre-pandemic and mid-pandemic status.

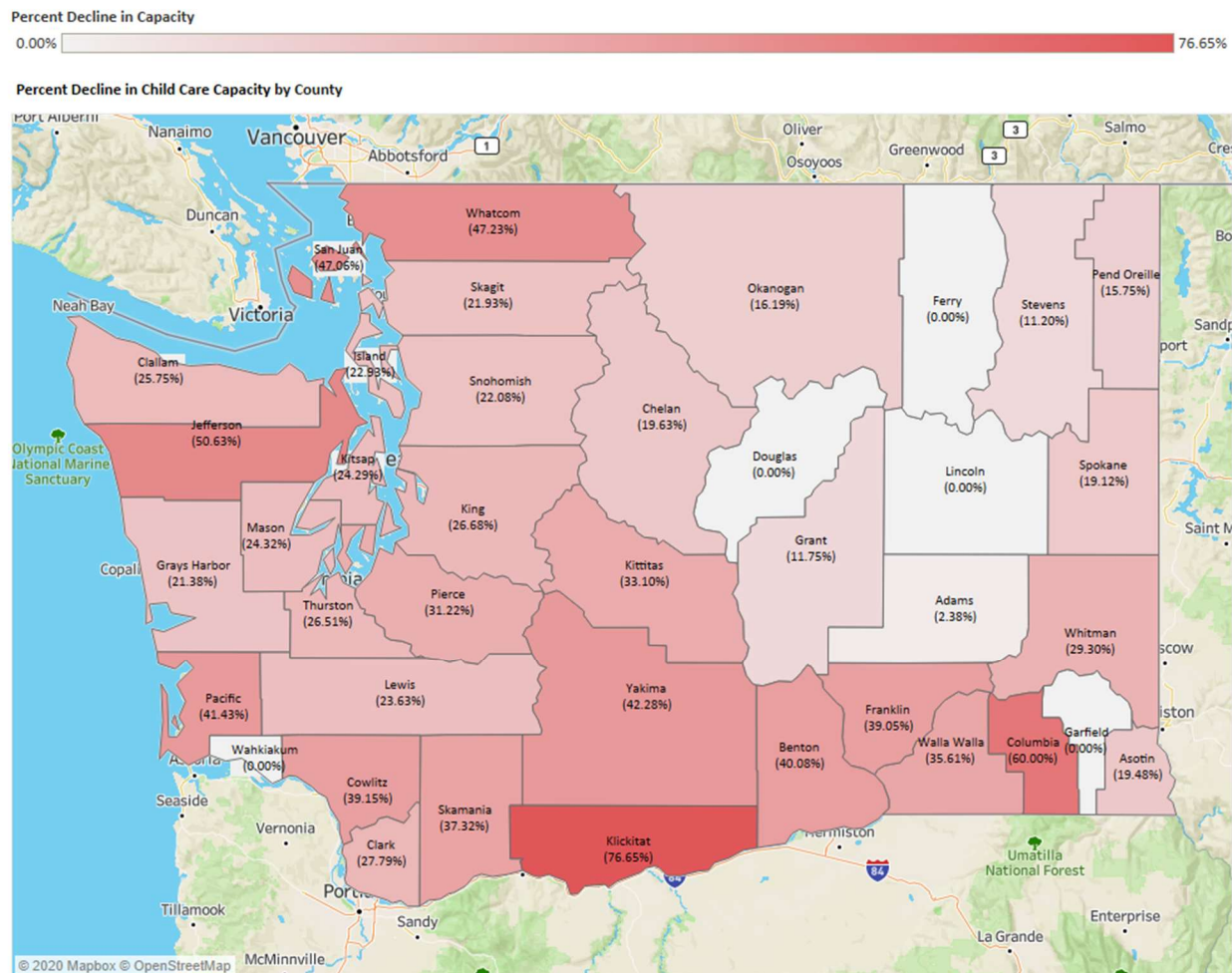
In Washington, the supply of licensed child care dropped by 27% between March 9 and June 25, 2020, based on data obtained from DCYF on licensed child care centers, licensed family child care homes and licensed school-age only programs. In early March, licensed child care programs in Washington had the capacity to serve approximately 187,000 children between from birth through age 12, but by the end of June, the capacity dropped to approximately 136,000. This does not account additional capacity that may have been lost among Head Start and ECEAP programs that closed or for additional reductions in capacity due to lower group sizes in programs that are still operating.

The percent change in supply by county as of June 25, 2020 ranged from 0% (no change) in several unaffected counties (Douglas, Ferry, Garfield, Lincoln, Wahkiakum) to a 77% decrease in supply in Klickitat, the most heavily impacted county. In particular:

- In three counties (Columbia, Jefferson and Klickitat), the capacity decreased by half or more.
- In 16 counties plus these 3 listed above, the capacity decreased by 25% or more.
- In King, Pierce and Thurston, three counties with particularly large population centers, the supply decreased from 25% to 30%.

Figure 55 shows the decrease in capacity by county. (Table F.9 in Appendix F shows additional detail on the change in capacity for each county.)

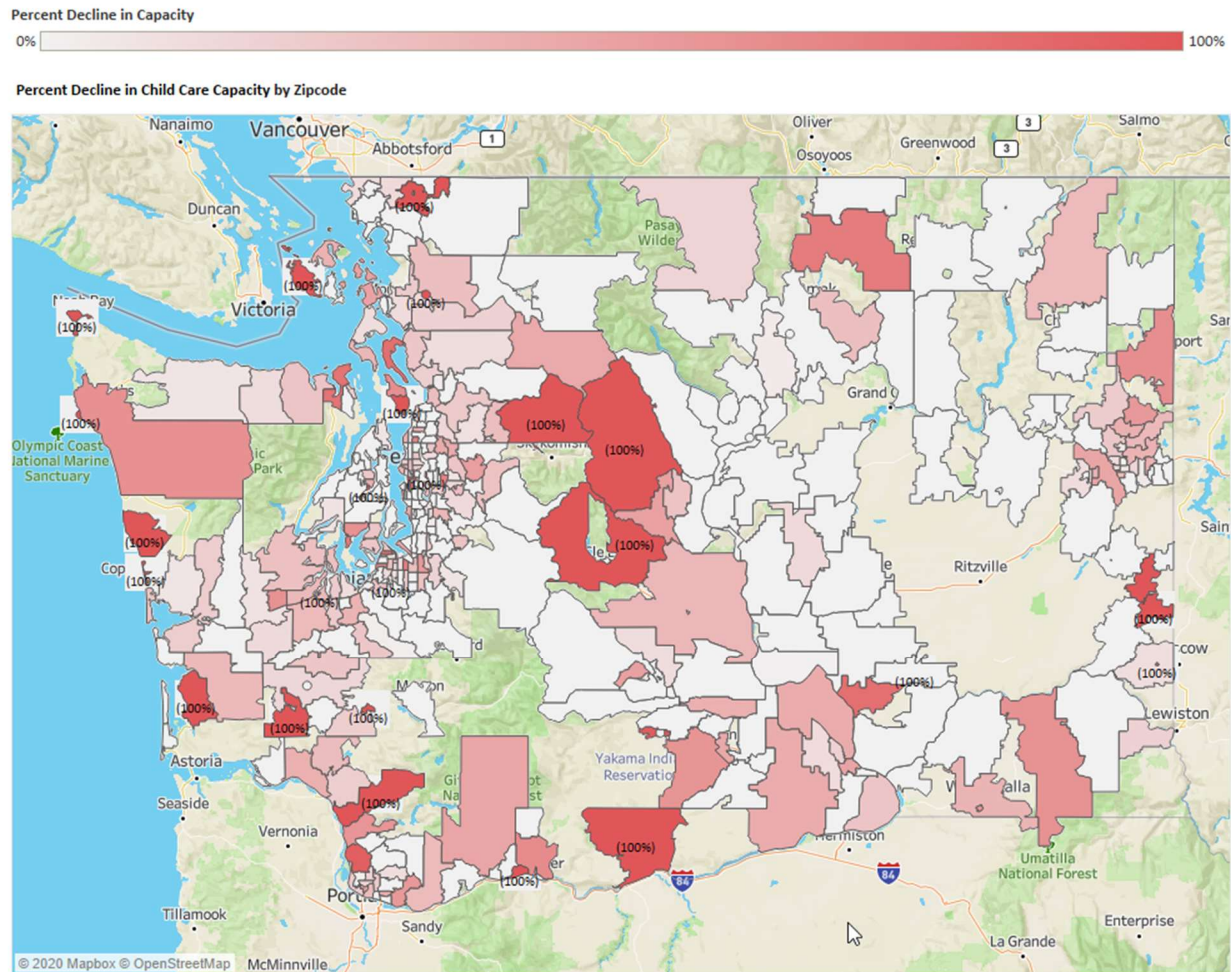
Figure 55. Decline in Child Care Capacity since COVID-19 Emergency Declaration, by County



Source: Department of Children, Youth and Families, June 25, 2020.

Reviewing the decrease in child care supply at the ZIP code level, the change ranged from 0% (no change in many areas), to some ZIP codes where the supply decreased by 100%; in other words, there is no available licensed capacity in those ZIP codes, shown in dark red on Figure 56, with additional detail found in Appendix F, Table F.10.

Figure 56. Decline in Child Care Capacity since COVID-19 Emergency Declaration, by ZIP Code



Source: Department of Children, Youth and Families, 2020.

7. Policy Implications

The analysis of supply and demand identifies key challenges that both families and providers face that the Child Care Collaborative Task force may wish to consider as it develops policy recommendations. Key policy implications include:

- Given that there are about 118,000 families with about 161,000 young children living in child care deserts in Washington, it will be critical to consider a **range of policy strategies to expand the supply of child care** in areas with limited access. These strategies could include increases in reimbursement rates to child care providers to the 75th percentile of market prices, direct grants or contracts in areas where market prices may make market entry or expansion financially risky for child care providers, grants to support providers

that reopen during the COVID-19 pandemic, and shared service collaborations that may lower the cost of market entry or expansion.

- Since each geographic area has unique supply and demand characteristics, it will be important to leverage the data in the Child Care Industry Insights Dashboard and the data in this report to **engage local stakeholders to draft solutions that are specific to the supply and demand characteristics of different areas**. For example, areas with no regulated capacity may require different strategies than those that have a significant but inadequate supply of child care.
- In general, access to care child care options in the regulated child care market decreases as incomes increase and affordability is a challenge for families of most income levels in all counties. The price of child care for all age groups and types of care as a percentage of median family income, far exceeds the 7% level recommended by the U.S. Department of Health and Human Services. Therefore, it is important to consider **expanding access to subsidies through Working Connections and ECEAP to cover both low-income and middle-income families** and limiting any family child care payments to a specific percent of family income – e.g., 7% of income or some other feasible target level.
- Families across different parts of the state do not have consistent access to higher quality child care providers, including Head Start, ECEAP and providers rated at the highest levels of quality in Early Achievers. Given the importance of quality to positive child development, it is important to consider **strategies for expanding the supply of providers that meet higher quality standards**, especially in areas where supply is limited, through a combination of indirect financial incentives (e.g., enhanced tiered reimbursement levels), direct financial incentives (e.g., direct grants or contracts with higher quality providers) and tax-based incentives.
- The child care workforce in Washington is ethnically and racially diverse and is generally representative of the population of children in the surrounding communities. It is important to **maintain the diversity of the workforce**, when planning and implementing strategies to strengthen the educational attainment levels of the workforce and expand the supply of providers that meet higher quality standards.
- The analysis estimates that there are a **large number of providers operating outside of the regulated child care market**. Use of this type of care may increase due to pandemic-related disruptions in the child care supply. Economic research and the research on child care decision-making indicate that families may use unregulated care due to supply limitations and affordability. Given the prevalence of using unregulated care, policy strategies may need to be developed to **engage unregulated providers**, incentivize them to meet health and safety standards, and/or become licensed or otherwise meet higher quality standards.
- This report represents only one snapshot of the underlying data. The Task Force can use the **Child Care Industry Insights Dashboard to further explore the data on supply and demand** at the county and zip code levels and to form data stories that compel stakeholders into action.

- Given that the COVID-19 pandemic has disrupted both the supply and demand for child care, it will be important to develop **new tools and practices to monitor the monitor the supply and demand for child care** – e.g., periodic family surveys to estimate changes in demand, tools for reporting child care vacancies in real time, and data insight tools that provide policymakers with data on potential gaps between supply and demand to inform policy interventions and track progress over time.
- Given that the pandemic has introduced changes to teacher-to-child ratios and new sanitization practices, it will be important to understand the **impact of these changes on already precarious child care provider finances** by expanding the preliminary analysis produced through the Child Care Cost Model Analysis to examining funding needed to ensure that provider remain financial viable.
- The magnitude of decrease in supply is of greatest concern in not only the highest-impact counties, but also those with highest populations. With **a 25-30% decrease in high population centers of King, Pierce and Thurston counties**, this is a large impact on the state’s workforce and constitutes a major hurdle for parents in returning to work, whether from home in telecommuting arrangements or in traditional on-site workplaces. In the interim, many parents may likely choose unregulated care arrangements, which may increase health and safety risks and pose the risk of delays in school readiness for many young children.

VII. Economic and Fiscal Impact Analysis

This analysis measures the economic and fiscal impacts of child care inaccessibility in Washington State over a ten-year period (2019-2028). Specifically, public data as well as survey responses completed by Washington parents are leveraged to estimate parents' lost income and employers' lost productivity and additional costs due to a lack of adequate child care. These impacts are modeled through the state's economy to determine the economic impacts, including the impacts on employment, earnings, gross domestic product (GDP), output, and state tax revenue. The following sections detail previous studies carried out by states related to this topic area, the methodological approach used to conduct the economic and fiscal impact analysis for the state, the results, and concluding remarks.

1. Previous Research on Economic Impacts of Child Care

Research regarding how the child care industry plays an integral role in the U.S.'s economic infrastructure and sustainability has gained traction in recent years. This is because there has been a surge in advocacy and in the development of public policy initiatives that encourage federal and state governments—along with other agencies and community stakeholders—to help make high-quality child care more affordable and accessible for families. As the macroeconomic, national-level impact of the child care industry has been traditionally studied, more states are initiating their own research inquiries to understand the scope and pervasive benefits of the child care industry in their regional economies. Specifically, state reports over the last decade have analyzed the characteristics of their own child care industry and the workforce it employs and quantified how the industry contributes to the economy in terms of job creation, tax revenue generation, and increased employment. These reports, as well as results from a 2019 report from the Committee for Economic Development (CED), indicate that there is a strong, salient relationship between child care and state and local economic growth and development (Early Learning Policy Group, n.d.; RegionTrack, 2019). While the 2019 CED report estimates that the child care sector supports \$99.3 billion in total U.S. output and over 2 million jobs nationwide, both directly and through indirect and induced multiplier effects, it also specifies how child care fosters regional economic growth through increased labor force participation and added education and training. These directly benefit state and local economies through increasing the size and quality of the labor force, respectively, which influence states' income levels, poverty rates, and overall economic prosperity (Hoynes et al., 2006).

States have documented through economic impact analyses how the child care industry supports regional growth predominantly through employing additional workers and generating additional output. Yet, some states have shifted their investigative approach towards exploring how child care inaccessibility and the prevalence of child care breakdowns are affecting parents' ability to participate in the labor force, which can translate into significant losses to families, employers, and states' economies. This economic impact study follows a similar approach, by measuring the impact of child care inaccessibility. These child care challenges—whether stemming from a lack of affordable and reliable care to other systematic barriers to access—have a broad influence on the job status of working and non-working parents. They can inhibit parents, especially those with young children, from being able to secure and retain viable employment. They also represent sources of short-term parental workforce disruptions and

hinder parents' ability to further their careers and achieve upward economic mobility in the long-term. For context, 2018 data from the National Survey of Children's Health (NSCH) indicated that 8.8% of parents nationwide had to quit a job, not take a job, or significantly change their job because of child care issues; this metric for Washington State was 9.6% (Novoa & Jessen-Howard, 2020). The availability of high-quality and affordable child care options would help enable parents to financially support their families, move towards economic self-sufficiency, and not forgo educational or career advancement opportunities. It would also stimulate regional economic growth through the increased earnings and spending by parents who either recently gained employment or who can increase their usual hours worked.

States such as Washington, Georgia, Indiana, Maryland, Louisiana, and Tennessee have recently completed studies that leveraged survey data to estimate the economic impact of child care instability on their respective state economies (Kennedy & Jones, 2019; Goldberg et al., 2018; Littlepage, 2018; Talbert et al., 2018; Davis et al., 2017; Belfield, 2019). These studies (whose economic impact analysis and survey results are delineated in Tables 25 and 26, respectively) quantify how employee absenteeism and turnovers—as a result of child care issues—impact the state's economy and government revenue. They focus on surveying their state's population of working parents with children under 6 years old and use those responses to determine the overall lost economic activity and reduced tax revenue as a result of child care inaccessibility. Of note, the methodologies leveraged in these reports differ in terms of the parameters used for the survey population as well as the definition used for absenteeism and the inclusion of employer opportunity costs. Though direct comparisons of results cannot be made given these differences, Tables 24 and 25 list the state-level and labor force populations for these areas as well as the costs estimated from these states' respective economic and fiscal impact analyses, respectively.

Table 24. Comparison of 2019 State-Level and Labor Force Populations

State	Population	Labor Force	Parents with Children Under 6	Both Parents Working with Children Under 6
Washington	7,562,424	3,954,206	1,629,845	549,526
Georgia	10,439,137	5,090,808	2,161,611	714,319
Indiana	6,590,291	3,411,098	1,419,833	502,869
Maryland	6,046,284	3,384,172	1,171,166	420,403
Louisiana	4,516,020	2,071,387	923,415	271,916
Tennessee	6,694,064	3,318,880	1,324,591	439,785

Source: U.S. Census, Annual Social and Economic Supplement (ASEC) of the Current Population Survey (CPS)

Table 25. Comparison of Economic Impact Analysis Results

State	Annual Cost to Employers	Annual Cost to the Economy	Annual Lost Tax Revenue
Washington	\$2.1 billion	\$6.5 billion ⁵	-
Georgia	-	\$1.8 billion	\$105 million
Indiana	\$1.8 billion	\$1.1 billion	\$119 million
Maryland	\$2.4 billion	\$1.3 billion	\$117 million
Louisiana	\$816 million	\$1.1 billion	\$84 million
Tennessee	\$270 million	-	\$220 million

With regards to employee absenteeism, these states' studies demonstrate how working parents with young children frequently miss entire days of work and experience instances of arriving late to work or having to leave work early due to child care challenges. Results from the Georgia, Maryland, and Louisiana reports indicate that surveyed working parents were absent an average of 7, 17, and 14 days annually, respectively, which translates to lost worker and employer productivity. To contextualize these state-level findings, several studies denote that nationally, employees with children miss an average of 8 to 9 days of work per year due to child care problems (Child Care Aware of America, 2019; Emlen & Koren, 1984). These results stress child care breakdowns have a significant effect on working and non-working parents across the nation, especially if these parents have to utilize unpaid time off to compensate for their workplace absences. Moreover, these findings underscore that missing work due to child care issues is pervasive across U.S. households as parents try to concurrently balance the needs of their families with work or educational pursuits and commitments.

In addition to experiencing short-term disruptions, a sizable portion of parents from these different studies expressed how child care breakdowns have impacted their work in more permanent ways—having to quit their job or being fired. This employee turnover is not only disruptive to individual families in terms of severing streams of previously reliable income, but it affects employers' bottom-lines by lowering productivity and increasing costs related to training, hiring, and recruitment. Table 26 shows the different results from these state-specific studies and a nationwide study (Belfield, 2018) which evaluated whether child care issues have caused working parents to leave their jobs, either voluntarily or involuntarily.

⁵ This metric is from the 2019 report, Washington State Childcare Study: Analyzing the Costs Facing Businesses Due to Workforce Turnover and Missed Time Associated with Inadequate Childcare Options. It represents the estimated amount that would be contributed to the state's GDP if employer costs associated with employee disruptions caused by child care issues were reinvested into firms; this definition differs from that of other state studies listed.

Table 26. Comparison of Turnover Results (Multiple Studies)

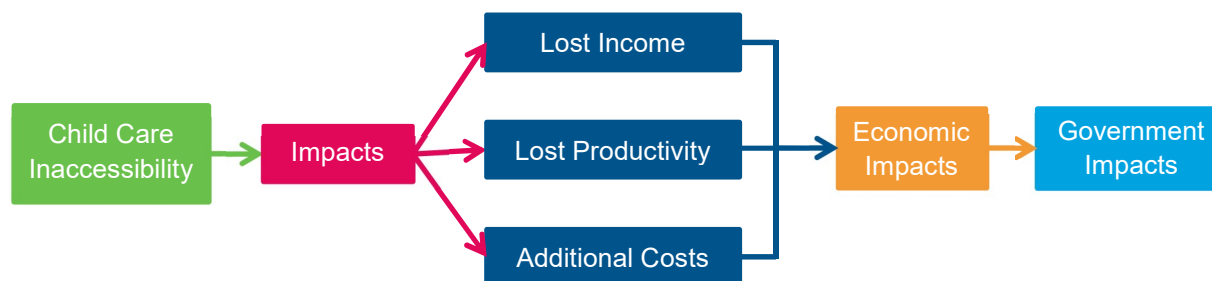
State	Parents who Quit due to Child Care Issues	Parents who were Fired due to Child Care Issues
Washington	18.0%	9.0%
Georgia	14.4%	4.9%
Maryland	1.7%	0.0%
Louisiana	16.1%	7.6%
Nationwide	13.0%	8.0%

While the quit and termination rates as a result of child care problems for working parents vary by region and state, these metrics are large enough to convey that child care inaccessibility puts parents at risk for being forced to leave stable employment, which can unexpectedly jeopardize families' financial security and negatively impact regional economic growth. Moreover, anywhere from 8-39% of parents (depending on the state report) indicated that child care issues have caused them to turn down promotions or job offers. However, these repercussions are more difficult to quantify the economic impact of though they can represent an area of significant loss related to forfeiting possible income gains.

Previous research related to assessing the economic impact of child care inaccessibility at the state-level has largely fixated on monetizing the effects of state-specific employee turnover and absenteeism. Yet, attempts to monetize the lost wages and productivity as a result of child care issues in terms of reduced state-level labor force participation hasn't been fully explored. This economic and fiscal impact analysis for Washington State builds upon the methodology leveraged by other states; however, there are two distinct differences. First, this report also estimates the economic losses from scenarios where parents are unemployed or are working part-time instead of full-time because of child care inaccessibility. Second, this analysis also considers lost productivity and earnings as a result of reduced labor force participation, which most previous studies did not consider. Thus, the approach employed for this analysis brings new insights into the analysis of the economic impacts of the lack of access to child care.

2. Methodology

This section details the methodology used to determine the economic and fiscal impacts of child care inaccessibility in Washington State. The approach for this economic and fiscal impact analysis consists of three components: 1) leveraging public and survey data to estimate the lost income, lost productivity, and additional costs associated with having inadequate child care solutions; 2) using an economic model to simulate these impacts throughout the state economy (using economic forecast that include COVID-19 impacts) and calculating the associated direct, indirect, and induced effects; and 3) using the model's outputs to estimate the impact on state tax revenue collection. These components are briefly summarized in Figure 57.

Figure 57. Logic Model for Economic Impact Analysis of Child Care Inaccessibility

To estimate the economic and fiscal impact of child care inaccessibility, this analysis calculates the impacts of three scenarios that arise when parents lack affordable and reliable child care options: lost time at work, employee turnover, and a reduction in labor force participation. For each of these three scenarios, parent and employer impacts are identified and extrapolated (when applicable). Parent impacts generally include lost income as a result of spending less time at work, not being employed, or not being fully-employed when it's desired. Employer impacts include lost productivity and additional costs incurred due increased employee turnover and employees lost time at work, and not operating at full potential capacity because of staffing shortages.

The first scenario of lost time at work is comprised of the number of hours and days working parents in Washington reported having to use unpaid time off to accommodate child care challenges; this concurrently generates losses in parents' earnings (because they aren't getting paid for their absences) and in employer productivity (because companies aren't as productive without their entire staff working). Employee turnover represents the additional turnover costs (in terms of hiring, recruiting, and training) a company accrues due to parents in Washington indicating that they have been fired or have had to quit their job to address child care breakdowns. Beyond additional costs, this scenario also produces lost employer productivity for the time it takes to replace these employees. For labor force participation, lost parent income and lower employer productivity stem from three sub-scenarios: 1) parents who are not employed but would be if it wasn't for child care inaccessibility; 2) parents who currently work part-time but would work full-time if it wasn't for a lack of child care; and 3) parents who had their normal working hours reduced due to child care issues. The summation of these labor force participation impacts results in a statewide workforce that isn't being fully-utilized and employers who are not producing at their full, potential capacity.

In addition to the direct impacts to households with children and employers themselves, the government also experiences losses in tax revenue due to child care inaccessibility. Before tax revenue losses are calculated, the three above scenarios are simulated through an economic model of Washington State (i.e. REMI PI+) to determine the economic impact these scenarios have on the state economy. The results are then used to estimate the fiscal impact on the state. Though Washington State does not have a personal income tax, state sales tax revenue derived from household purchases are impacted by a reduction in earnings and revenue from the Business and Occupation (B&O) tax is impacted from lost productivity. To calculate the impact on the state sales tax, the state tax rate is applied to taxable consumer expenditures. To calculate the change in B&O tax revenue, Washington state's industry-specific B&O tax rates

(as reported by the Washington State Department of Revenue) are applied to the impact on the value of production (gross receipts), of employers that operate in the state. Thus, the lost earnings, productivity derived from lost time at work, employer turnover, and a reduction in labor force participation produces foregone sales and B&O taxes that the state would have generated otherwise. The summation of the sales and B&O taxes represents the fiscal impact of child care inaccessibility to Washington State. A detailed logic model summarizing these impacts is in Figure 42 and the succeeding sections provide additional insight into the data, economic model, and economic environment used.

2.1 Data Collection

Data from public sources and the ICF Parent Survey were leveraged to estimate the parent and employer impacts from the three aforementioned scenarios. For all these scenarios, the impacts of child care inaccessibility were scaled up to the applicable statewide population of parents with children from birth through 12 years old. These baseline population metrics were provided by the Annual Social and Economic Supplement (ASEC) of the Current Population Survey (CPS)—from the U.S. Census. As of March 2019, there were 983,188 parents in Washington state with children in this age range who were employed (830,116 were full-time while 153,072 were part-time) and 52,201 parents with children in this age range who were unemployed. Both the survey results and third-party proxies were applied to these baseline population metrics to determine the impacts of child care breakdowns on the employability and earning potential of parents as well as the productivity of employers.

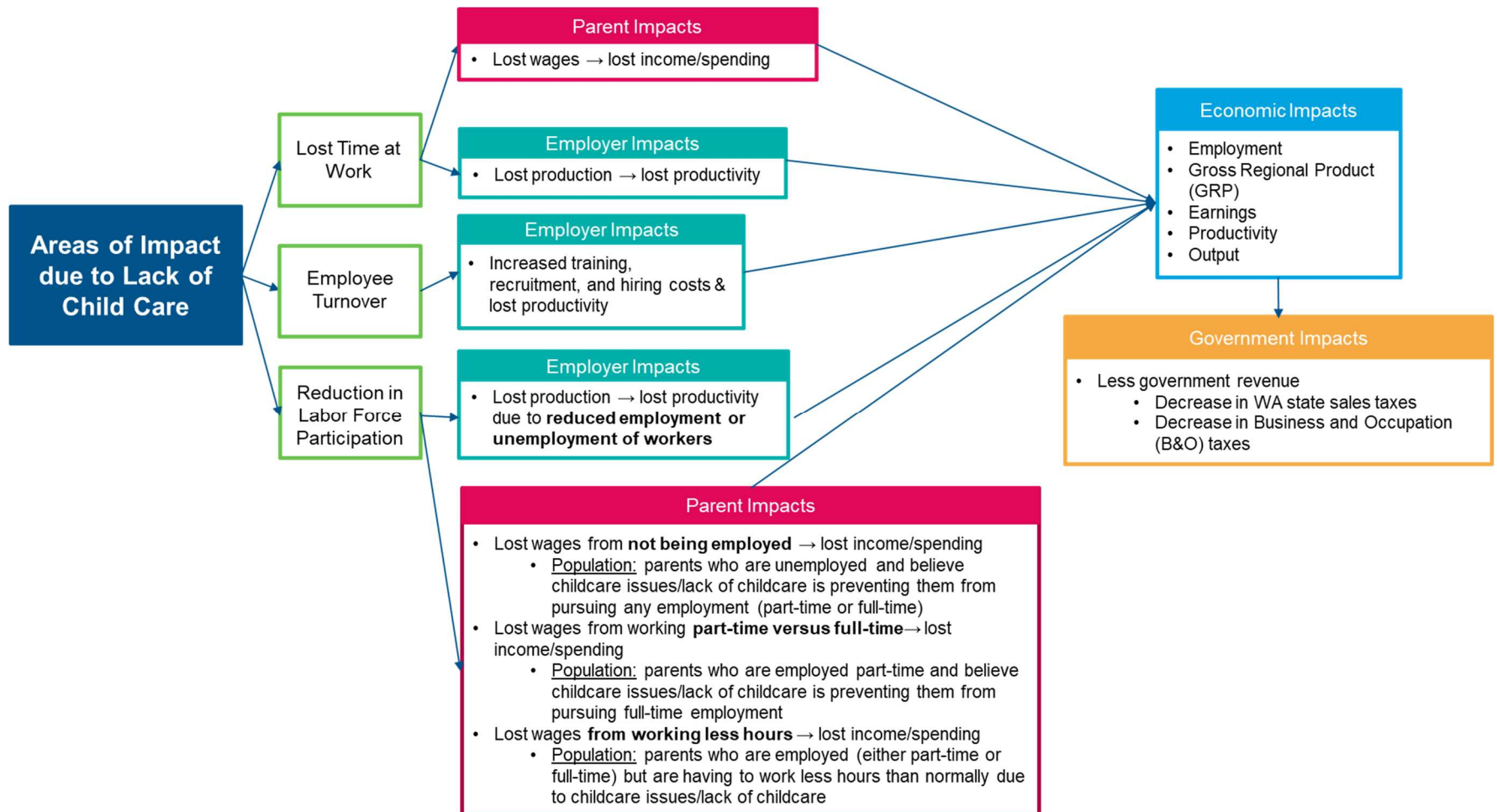
For the lost time at work scenario, the responses to the following two questions from the 2020 statewide parent survey were used to estimate out of the 983,188 employed parents in Washington state, how many had to use unpaid time off due to having to address child care problems and of those, how many total hours of unpaid time off were taken:

- In the past 12 months, have you or your spouse or partner had to take time off due to child care issues?
- In the past 12 months, how many hours or days have you or your spouse or partner taken unpaid time off due to child care issues?

Of note, only unpaid time off was considered for this scenario since salaried employees could potentially use their paid time off (PTO) to deal with child care issues and by doing this, they presumably would not lose any earnings. After totaling the hours of unpaid time off taken for this segment of the Washington working parent population, a weighted hourly wage (based on the occupational distribution of the survey respondents who responded to these questions) was calculated using state-specific wage data from the Bureau of Labor Statistics (BLS) (Bureau of Labor Statistics, 2019). The product of these metrics was taken to represent the monetized parent impact for this scenario. Of note, all impacts for this analysis are expressed in 2019 dollars, and inflation rates determined by the Consumer Price Index (CPI) were used where applicable (Bureau of Labor Statistics, 2019). To calculate the employer impacts for lost time at work, the unpaid hours reported by survey respondents were segmented by the industry distribution of the respondents; these unpaid hours were then scaled up to the appropriate statewide population metric to determine how many unpaid time off hours were used by industry. Then a weighted multifactor productivity hourly rate (Bureau of Labor Statistics,

2020)—provided by BLS and that was based on the value of production and hours worked for each major industry—was applied to these hours to estimate how much in production value was lost due to parents having to take unpaid time off to address child care issues. The logic model is illustrated in Figure 58 following.

Figure 58. Logic Model for Economic Impact Analysis of Child Care Inaccessibility in Washington State



For the employee turnover scenario, the percent of Washington parents who reported having to quit a job, not take a job, or significantly change their job because of child care issues (9.6%) in the 2018 National Survey of Children's Health (NSCH) was used (Novoa & Jessen-Howard, 2020). Since this source only included responses from parents with children under 6 years old, this 9.6% was only applied to the portion of the statewide working parent population with children in that same age range. As a result, an imputed turnover rate of 2.1% was applied just to the portion of this state's employed parent population with children aged 6 through 12 years old. The 2.1% imputed turnover rate was calculated based on data from the Annual Social and Economic Supplement (ASES) of the Current Population Survey (CPS) from the U.S Census, that specifies the use of child care for Washington state parents with children 0 through 5 years old and 6 through 12 years old. The proportion of these two age groups that use of child care is used to determine the 2.1% turnover rate for the 6 through 12 year old group.

Using the above turnover rates, a proxy that indicates 20.7% of an employee's annual salary represents a company's turnover costs (Boushey & Glynn, 2012), and the weighted annual salary of survey respondents (based on their occupational distribution), the additional replacement costs to employers was calculated. This represents one of the employer impacts. The second impact relates to lost productivity. For the number of the statewide working parent population who quit, did not take, or significantly changed their job due to child care challenges, employers lose productivity for the time it takes to replace them or fill staffing gaps depending on the scenario. Using a proxy that estimated it takes an average of 30.2 days to fill a vacant position in the U.S. West region (DHI Group, 2018), the assumption that a worker works 7 hours a day on average, and a weighted multifactor productivity hourly rate based on the industry distribution of survey respondents, the lost productivity as a result of employee turnover is calculated.

For the final scenario of reduced labor force participation that stems from child care inaccessibility, lost parent income and employer productivity were determined for each of the three sub-scenarios and then totaled. For the first sub-scenario of unemployed Washington parents who indicated a lack of child care is preventing them from seeking employment, the percent of the survey population who answered the following question was calculated (where respondents indicated whether they would pursue part-time or full-time work if child care wasn't an issue):

- If you are currently unemployed and seeking employment, is child care an issue that is preventing you from obtaining employment?

The resulting percentages (i.e. those who indicated they would pursue full-time versus part-time work) were applied to the number of unemployed parents statewide (52,201), separately, and then multiplied by the reverse of the state's unemployment rate (95.7% from the Bureau of Labor Statistics, 2019) to represent the number of unemployed parents who would pursue employment if child care wasn't a problem and who would actually obtain either full-time or part-time employment are calculated. Calculating the lost income of these potential full-time and part-time workers separately, the average weekly hours worked for each of these job statuses

(42.2 and 21.2, respectively)⁶ were annualized and applied appropriately. They were then multiplied by the weighted average hourly wage for those who completed the survey (based on the occupational distribution of the respondents and BLS state-specific wage data) to represent these parents' lost income. For the associated lost productivity (the employer impact), the total full-time and part-time hours lost were distributed by the industry composition of survey responses, multiplied by their industry-specific multifactor productivity hourly rate, and then summed.

For the second sub-scenario (i.e. parents who are working part-time but would be full-time if child care wasn't an issue), the resulting lost parent income uses the number of Washington parents who are part-time workers and indicated in the ASEC CPS that the main reason they were part-time was due to child care issues (15,724) is calculated. The difference between the average weekly full-time (42.2) and part-time (21.2) hours worked is annualized and then applied to the number of these parents in this situation. This represents the additional hours lost from Washington parents not being able to work full-time due to child care issues; in other words, if child care breakdowns did not occur, these parents would work almost double their current hours. The total hours lost is then multiplied by the same weighted average hourly wage of the survey respondents to estimate lost parent income. The associated lost productivity for this sub-scenario takes these lost hours and divides them among the major industries based on the industry distribution of survey respondents. The appropriate multifactor productivity hourly rates are then applied by industry and these amounts are totaled to represent the lost value of production realized due to these Washington parents not working full-time because of child care issues. For the last sub-scenario, the percent of survey respondents who answered the following question was applied to the statewide population of working parents with children birth through 12 (983,183) to estimate how pervasive a reduction of normal hours due to child care issues is statewide:

- In the past 12 months, have you or your spouse or partner reduced the number of hours or days you work due to child care issues?

Those who did indicate their normal work schedule was altered due to child care issues also noted by how many hours and days their work was reduced. From this, the average number of hours reduced per parent was multiplied by the number of employed Washington parents who reported having their hours reduced. Then the weighted average hourly wage (based on the occupational distribution of the survey respondents) was applied to determine how much in parent income was lost due to having to make these work schedule adjustments that stemmed from child care breakdowns. For the associated lost productivity, these total hours were distributed across industries based on the industry distribution of survey respondents and then the appropriate multifactor productivity hourly rates were applied. This employer impact denotes the value of production lost due to parents having to decrease their hours worked as a result of child care issues.

Once the impacts associated with these three scenarios were run through the economic model, the applicable output was taxed to estimate the fiscal impact of child care inaccessibility. The

⁶ These are Washington-specific values from the March 2019 Annual Social and Economic Supplement (ASEC) of the Current Population Survey (CPS) for working parents in Washington state with children aged 0 through 12 years old (<https://data.census.gov/mdat/#>).

state sales tax (6.5%) and the ratio of taxable expenditures for the U.S. West region (31.6%), the latter provided by the Consumer Expenditures Survey, was used to calculate the impact on state sales tax revenue. Additionally, the impact on output (sales receipts) that stemmed from lost productivity is taxed using industry specific B&O tax rates. The summation of these amounts represents the total loss in state tax revenue due to child care inaccessibility in Washington State.

2.2 REMI Model

The economic impact analysis utilized the REMI PI+ model for Washington State. REMI PI+ is a structural economic forecasting and policy analysis model. The model integrates input-output, computable general equilibrium, econometric, and economic geography methodologies. The model is dynamic, with forecasts and simulations generated on an annual basis and behavioral responses to compensation, price, and other economic factors. The model is widely used across the nation and by agencies within the Washington state government, including the Department of Ecology, Department of Transportation, the Joint Legislative Audit & Review Committee, and the Office of Financial Management.

The model consists of thousands of simultaneous equations with a structure that is relatively straightforward. The overall structure of the model can be summarized in five major blocks: (1) Output and Demand, (2) Labor and Capital Demand, (3) Population and Labor Supply, (4) Compensation, Prices, and Costs, and (5) Market Shares. The Output and Demand block consists of output, demand, consumption, investment, government spending, exports, and imports, as well as feedback from output change due to the change in the productivity of intermediate inputs. The Labor and Capital Demand block includes labor intensity and productivity as well as demand for labor and capital. Labor force participation rate and migration equations are in the Population and Labor Supply block. The Compensation, Prices, and Costs block includes composite prices, determinants of production costs, the consumption price deflator, housing prices, and the compensation equations. Lastly, the proportion of local, inter-regional, and export markets captured by each region is included in the Market Shares block. See Appendix G for a full description of the REMI model framework.

2.3 COVID-19 Updated Adjustments to Model

To compensate for recent economic conditions and projected trends because of the COVID-19 pandemic, the REMI model economic forecast and inputs were updated for the years 2020 through 2022. The REMI model used for this study included an economic forecast from the University of Michigan Research Seminar in Quantitative Economics (RSQE)—released in April 2020—that incorporates updated and projected GDP by component, reflecting the economic impacts of COVID-19. The RSQE forecast projects U.S. Real GDP to decline by 7% from the first quarter to the second quarter of the year (or 25% on an annualized basis) and the national unemployment rate to reach a peak of 16% in May 2020 and to an average of 14% in the second quarter (Burton et al., University of Michigan RSQE forecast, 2020). The RSQE forecast assumes that new COVID-19 cases will taper off quickly by late May 2020 or early June 2020, with the economy beginning to reopen around that time. Of particular importance to this study is the unemployment rate, as that can impact the need for child care; the RSQE forecast projects that the U.S. unemployment rate will drop quickly from a peak of 16% in May 2020 to 7% in July 2020 and 5% by the end of 2022.

In addition to the updated economic forecast, to incorporate for the potential drop in demand for child care as unemployment is projected to increase in 2021 and 2022 due to COVID-19, inputs for the lost time at work, employee turnover, and reduction in labor force participation scenarios were adjusted to reflect the projected unemployment rates for those years.

Of note, the economic model (REMI PI+) for this study is dynamic and includes in its baseline forecast economic assumptions for Washington, such as real personal income, disposable income, consumer prices, wages, labor force and employment levels, and GDP. In general, the forecast in the REMI PI+ model for 2020 is consistent with the Washington Forecast Council's forecast. There are, however, considerable differences in 2021, particularly for employment levels and the unemployment rate. The REMI PI+ model used for this analysis projects non-farm employment to be 3,760,000 and an unemployment rate of 4.0% in Washington state in 2021, while the Washington Forecasting Council is projecting employment of 3,360,000 and an unemployment rate of 16.6%. This may be because of differing forecasts for the long-term impacts of COVID-19. As noted above, the REMI forecast assumes a sharp economic recovery from COVID-19 in 2021, while the Washington Forecast Council may be estimating a slower recovery. Of note (according to BLS), the Washington state seasonally adjusted preliminary unemployment rate for May 2020 was 15.1%, dropping from 16.3% in April 2020. Forecasts for U.S. GDP in 2021 are consistent between the REMI model and the Council, \$20.9 trillion and \$20.69 trillion, respectively. The Task Force may want to consider consulting with the Washington Forecasting Council to determine how the model's assumptions compare to the Council's most recent forecasts, in areas like labor force and employment, and identify any areas of difference and consider updating the model accordingly.

3. Results

The results of the economic and fiscal impact of child care inaccessibility are summarized below. The summary uses common economic indicators, including employment, GDP, output, and personal income. For a comprehensive set of detailed results, see Appendix H.

3.1 Economic Impact

Table 27 shows the economic impact of inaccessibility of child care in Washington State between 2019 and 2028, for common economic indicators. The impact on employment ranges from 161,300 jobs in 2019 to 109,100 jobs in 2028, an annual average of roughly 133,360 jobs over the time period; this represents about 2.9% of all jobs in Washington State in 2019. The impact on employment is largely related to lower consumer spending as a result of wages lost from loss time at work and lower workforce participation, due to child care inaccessibility in Washington State.

The impact on gross state product (GSP) ranges from \$39.2 billion in 2019 to \$31.0 billion in 2028, an annual average of \$34.8 billion per year; this represents 6.6% of total gross state product in Washington State in 2019. The large disproportional impact on gross state product as compared to employment is a result of lost productivity and thus production by firms due to the lower labor force participation and greater employee turnover in the state, as a result of inaccessibility to child care. As parents decide to forgo working due to child care issues, and remain out of the labor force, businesses lose out on the production that these workers can contribute. This dynamic has its most impact during times of tight labor markets and low

unemployment, when businesses often cannot reach their full production potential and meet demand due to labor shortages.

Table 27. Inaccessibility of Child Care in Washington State – Economic Impact Summary

	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	Annual Average 2019–2028	Percent of State Total 2019
Total Employment (Thousands)	-161.3	-152.0	-150.4	-145.2	-136.9	-128.9	-121.8	-116.1	-112.0	-109.1	-133.4	3.5
Gross State Product (Billions of 2019 \$'s)	-39.2	-36.9	-36.8	-36.7	-35.5	-34.3	-33.3	-32.3	-31.6	-31.0	-34.8	7.4
Output (Billions of 2019 \$'s)	-64.2	-60.5	-60.3	-60.1	-58.1	-56.1	-54.3	-52.8	-51.5	-50.5	-56.8	7.2
Personal Income (Billions of 2019 \$'s)	-16.7	-14.2	-14.8	-15.2	-14.9	-14.6	-14.3	-14.1	-14.0	-14.0	-14.7	3.8

Source: ICF utilizing the REMI PI+ economic model.

Table 28. Inaccessibility of Child Care in Washington State – Employment Impact by Industry (thousands)

Industry	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	Annual Average 2019–2028
Health care and social assistance	-16.1	-13.9	-14.0	-13.9	-13.5	-13.1	-12.7	-12.4	-12.3	-12.2	-13.4
Professional, scientific, and technical services	-15.8	-14.4	-13.5	-12.6	-11.6	-10.6	-9.8	-9.0	-8.5	-8.1	-11.4
Administrative, support, waste management, and remediation services	-15.1	-13.8	-13.5	-13.2	-12.6	-12.0	-11.5	-11.0	-10.7	-10.4	-12.4
Retail trade	-14.0	-12.1	-11.5	-11.1	-10.4	-9.8	-9.2	-8.8	-8.6	-8.4	-10.4
Construction	-13.4	-14.0	-12.9	-10.6	-8.0	-5.7	-3.8	-2.4	-1.6	-1.3	-7.4
Other services (except public administration)	-12.7	-10.5	-10.4	-10.1	-9.5	-9.1	-8.7	-8.4	-8.1	-7.9	-9.5
State and Local Government	-12.4	-18.2	-20.3	-20.9	-20.9	-20.6	-20.0	-19.5	-18.9	-18.4	-19.0

Source: ICF utilizing the REMI PI+ economic model.

The impact on output is similar to GSP as GSP is a component of output. Output is most closely related to gross sales, while GSP is the amount of those sales that remain in the state, such as wages for state residents, business-to-business purchases between state firms, and profits for firms based in the state. The impact on output ranges from \$64.2 billion in 2019 to \$50.5 billion in 2028, averaging \$56.8 billion per year across the time period, roughly 6.4% of Washington State's total output.

The impact on personal income is a direct result of parents' lost wages from time lost at work due to child care inaccessibility and lower labor force participation, and the indirect impact on employment from lower consumer spending. The impact on personal income ranges from \$16.7 billion in 2019 to \$14.0 billion in 2028, averaging roughly \$14.7 billion per year across the time period, roughly 3.4% of Washington State's total personal income.

In summary, if child care were readily accessible (without common barriers) to all Washington state households with children up through 12 years old, the state would be projected to have an additional 133,360 jobs, \$34.8 billion in additional gross state product, \$56.8 billion in additional output, and \$14.7 billion in additional personal income, per year on average over the next 10 years.

Table 28 shows the impact of child care inaccessibility on **employment by industry sector** for the sectors that are impacted the greatest over the 10-year period (for all industry sectors and their associated sub-sectors, see Appendix H). The health care and social assistance sector is projected to have the greatest employment impact from inaccessibility to child care in 2019 (16,100 jobs) followed by professional services (15,800 jobs), administrative and support services (15,100 jobs), retail trade (14,000 jobs), construction (13,400 jobs), other services (except public administration)⁷ (12,700 jobs) and state and local government (12,400 jobs). The impact that inaccessibility has on employment is a direct effect of parents' lost wages due to loss time at work and remaining out of the workforce, the impact on productivity from lost time at work, greater employee turnover, and a reduction in labor force participation statewide, and in the case of state government, the impact that parents' lost wages and less productivity have on tax revenue generation.

Lost wages lead to less consumer spending which will impact many sectors of the economy, such as retail trade and accommodations and food service, resulting in less workers who are employed in these sectors. Moreover, reduced productivity leads to less production by firms in all sectors of the economy where workers that depend on child care are employed, leading to a smaller workforce and less tax revenue for state government.

Table 29 shows the impact of child care inaccessibility by **type of impact** (i.e. looking at the impact for each of the three aforementioned scenarios, separately) for 2019 only. The impact of reduced labor force participation as a result of child care inaccessibility represents roughly 58% of the total economic impact while lost time at work represents about 35% and employee turnover represents almost 8%. Inaccessibility of child care leads to lower rates of labor force participation, as household members decide not to work, or work less, due to child care issues. The foregone earnings that result from less labor force participation and the foregone

⁷ "Other services (except public administration)" includes industries related to repair and maintenance, personal and laundry services, private households, or religious, civic, or professional organizations.

productivity of these workers has significant impacts on the economy, and as a whole lead to a greater impact than that of the employee turnover and lost time at work scenarios combined.

It is important to note that the economic impact by the type of scenario was simulated separately for each impact category and will not add up the total impact combined, shown above in Table 27. When taken as a whole, the impacts of these three scenarios will be less, since simulating all three scenarios cumulatively factors in dynamic relationships within the economy, such as the dynamic nature of changes in prices and factor costs. Simulating the economic impact by scenario type separately provides a general comparison of the magnitude of impact by type, but the true total economic impact, as a whole, is represented above in Table 27.

Table 29. Inaccessibility of Child Care in Washington State – Economic Impact Summary by Scenario Type for 2019

	Employee Turnover	Employee Turnover Percent of Total Impact	Reduced Labor Force Participation	Reduced Labor Force Participation Percent of Total Impact	Lost Time at Work	Lost Time at Work Percent of Total Impact
Employment (Thousands)	-16.5	9%	-100.8	56%	-63.2	35%
Gross Domestic Product (Billions of Fixed 2019 Dollars)	-2.6	6%	-23.7	58%	-14.3	35%
Output (Billions of Fixed 2019 Dollars)	-4.2	6%	-38.9	58%	-23.4	35%
Personal Income (Billions of Fixed 2019 Dollars)	-1.6	9%	-10.2	58%	-5.8	33%

Source: ICF analysis utilizing the REMI PI+ economic model

3.2 Fiscal Impact

Table 30 shows the fiscal impact of child care inaccessibility on Washington State. Two sources of state government tax revenue are considered for the calculation of fiscal impact: the Business and Occupation (B&O) taxes and the state sales tax. All other state and local tax revenue sources are not included. The findings represent the amount of tax revenue from these two sources that are foregone or not realized by the Washington state government due to the economic impacts of child care inaccessibility statewide. Foregone state tax revenue from these two sources range from roughly \$1.2 billion in 2019 to \$935 million in 2028, and annual average of \$1.03 billion. The greatest impact is on the Business and Occupation tax, representing about 70% of the annual fiscal impact on average. This is a result of the impact on production, driven by a combination of lower workforce participation, employee turnover, and lost time at work. The impact on the sale tax is a direct result of less consumer spending on taxable goods, resulting from parents' lost wages due to lost time at work and lower workforce participation.

Table 30. Inaccessibility of Child Care in Washington State – State Fiscal Impact (millions \$’s)

Tax	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	Annual Average 2019–2028
Business and Occupation	-821.2	-774.2	-774.6	-772.4	-746.7	-721.3	-698.0	-677.5	-661.3	-648.0	-729.5
Sales	-343.3	-292.0	-304.4	-311.8	-306.2	-300.4	-294.9	-290.5	-288.2	-287.2	-301.9
Total	-1164.5	-1066.1	-1079.0	-1084.2	-1053.0	-1021.7	-992.9	-968.0	-949.5	-935.2	-1031.4

Source: ICF utilizing the REMI PI+ economic model.

4. Conclusion

The results of the economic impact analysis show that Washington's households, businesses, and economy experience major economic and fiscal losses due to child care inaccessibility. Findings indicate that the direct, indirect, and induced effects of short- and long-term disruptions derived from child care breakdowns translate not only into parents having less disposable income and companies being less productive, but also into lost government tax revenue, a reduction in the state's workforce, a decrease in statewide production, and thus a decrease in gross state product (GSP).

If the scenarios of lost time at work, employee turnover, and a reduction in labor force participation (which originate from child care inaccessibility) were addressed with adequate child care options, the state's economy as a whole would be on average \$34.8 billion larger each year over the next decade, as measured by gross state product, and have 133,360 more jobs. These comprehensive effects can be minimized by private and public entities investing in solutions that allow more parents to access consistent, high-quality, and affordable child care. Additionally, creating incentives or programming that encourage family-friendly policies in the workplace (e.g. onsite child care, flexible work schedules, child care subsidies, etc.) would also help mitigate the impact by attracting and retaining working parents. Overall, this analysis posits that an all-inclusive strategy is needed to more effectively support the growing needs of working families in Washington state and how directly addressing child care issues can produce positive returns for employers, families, and the state's economy.

It is important to keep in mind that while updated projections estimating the impact of COVID-19 on the GSP have been included, what is not yet known is the lasting effect of the pandemic on child care supply, and parent's employment impacts or choices. Discussion of child care supply among state leaders has already identified numerous temporary closures of child care programs—as well as the potential need to reduce the number of children accommodated in remaining programs—with long-term capacity changes still to be understood. Additional analyses after the initial pandemic has faded may shed further light on how the pandemic will affect the future supply of care, and how inaccessibility of child care influences the state.

Key Takeaways of Economic Impact

Inaccessibility, or lack of access to child care, has a direct effect on a state's economy in terms of the parental lost wages due to lost time at work and remaining out of the workforce, the lost productivity from lost time at work, greater employee turnover, and reduced statewide labor force participation, and in the case of state government, lost tax revenue as a result of lost wages and less productivity combined.

Examining impact by employment sector, this effect is estimated to have the greatest impact on a few sectors:

- health care and social assistance
- professional services
- administrative and support services
- retail trade
- construction

- other services (except public administration)
- state and local government

Overall, child care inaccessibility leads to lower rates of labor force participation, as household members decide to not work, or work less, due to having to address pertinent child care issues. As shown earlier, the impact of labor force participation represents roughly 58% of the total economic impact while lost time at work represents about 35% and employee turnover represents almost 8%. The foregone earnings that result from less labor force participation and the foregone productivity of these workers have significant impacts on the economy, and as a whole lead to a greater impact than that of employee turnover and lost time at work combined.

The total amount of tax revenue, that is foregone or not realized by Washington state due to the economic impacts of child care inaccessibility, ranges from roughly \$1.2 billion in 2019 to \$935 million in 2028, **and an annual average of \$1.03 billion**, largely due to reduced output which lessens the potential revenue on the Business and Occupation (B&O) tax.

Discussion

Taken as a whole, this analysis provides a rich picture of the child care industry in Washington State, to support the Child Care Collaborative Task Force in assessing needs and making recommendations to the legislature for child care policies that support Washington's working families and promote a healthy state economy.

As described in the Economics of Child Care Markets section of this report, despite the great promise of public investments in early childhood, the current financing structure only serves a fraction of the families who need high-quality care and hampers the development of a stable, highly qualified, and high-quality workforce, making the financing structure neither sustainable nor adequate to provide the quality of care and learning children and families need. The child care market has essentially failed and the consequences of this long-standing approach to financing have left many families without access to affordable, high-quality early childhood programs, perpetuating and driving inequality. This section of the report highlights the fragmented nature of the early childhood market and early childhood policy interventions and highlights work from the report on Transforming the Financing of Early Care and Education that may provide insight for the Child Care Collaborative Task Force in crafting policies that will help improve quality, access and affordability for child care in Washington.

The section on the Supply and Demand for Child Care identifies challenges that parents face across the board in accessing child care, including challenges related to access, quality and affordability. There are child care deserts in every county in the state, where the supply of providers is inadequate to meet the potential needs of multiple families demanding care. Families across different parts of the state also do not have consistent access to higher quality child care providers, including Head Start, ECEAP and providers rated at the highest levels of quality in Early Achievers. In addition to the challenges that families face when trying to find care, regardless of quality, they also face significant challenges related to affordability. The price of child care for all age groups and types of care as a percentage of median family income far exceeds the 7% level recommended by the U.S. Department of Health and Human Services in every county. These challenges may move families to choose child care options outside of the regulated market for care, where there are limited health and safety regulations and no specific standards for quality. These challenges have persisted across the nation for decades, despite different multiple efforts to expand access to quality child care, and the recent COVID-19 pandemic has disrupted supply and demand and could serve to exacerbate and perpetuate these challenges. The results contained in this report and the Child Care Industry Insights Dashboard developed as part of this study can be used by the Task Force as part of a new suite of tools and practices that policymakers can use to monitor the supply and demand for child care and develop strategies for addressing gaps and inequities.

The Parent Voices section of this report sheds more light on child care from parents' perspectives, describing families' needs and preferences for care, their current arrangements, and the impact of limited access to child care or child care concerns on their work lives and employment choices. In the statewide parent survey, the state employee survey, and individual stories told in listening sessions, parents described their preferences and frequent reliance on family members and informal arrangements for care, and their needs for flexible care and nontraditional hours of care, which are rarely accommodated by licensed/regulated programs.

Families also described the challenge of finding affordable care, and in surveys and interviews consistently named the cost of care as their greatest concern or challenge in finding care. As the supply/demand analysis shows, families that have an infant and a child of preschool age in the least affordable counties could spend as much as 35% of their income for full-time care in center-based settings and as much as 29% in family child care settings. Single mothers that have an infant and a child of preschool age in the least affordable counties would have to spend more than 150% of their income for full-time care in center-based settings and more than 120% in family child care settings. Parents in listening sessions frequently described the cost of care as a preventive factor keeping them out of the workforce.

Parents' perspective on the challenges experienced as a result of child care issues are sobering. In the statewide survey, a substantial number of parents reported having missed work due to child care issues, that child care issues had a negative impact on their work at least some of the time, and that they had experienced financial hardship as a result of child care concerns.

- A little less than half (44.5%) of respondents reported that they or their spouse/partner had to take time off due to child care issues in the past 12 months. A little more than a third (37.8%) reported they had reduced the number of hours or days worked due to child care issues.
- Nearly one in five respondents reported that in the past year they have turned down a job offer or promotion due to child care issues.
- Over a third (34.1%) of parents reported that they had experienced financial hardship as a result of child care concerns.
- In the statewide survey, a substantial portion of parents (47%) who were unemployed and job-seeking named child care issues as a concern preventing them from obtaining employment. This concern was also addressed by some of the parents interviewed in parent engagement sessions, with some discussing in detail having dropped out of the workforce and feeling they could not afford to pay for child care in order to return to work.

There were several areas in which negative effects of child care issues fall harder on certain subgroups of families than others, especially noted in the parent survey.

- Missing work: Parents surveyed who were more likely to need to take time off due to child care issues were:
 - Those with all parents in household working,
 - Asian/Pacific Islander respondents (in contrast, this was least likely among Hispanic respondents),
 - Those in urban areas, and
 - Those with higher education and income levels.
- Negative impacts of child care issues on parents' job were more often reported by:
 - Non-Hispanic Black parents (and least often by White parents),
 - Single working parents and 2-working parent households,
 - Those with a graduate education vs. lower educational levels,
 - Those with a high income level (\$200,000 or greater); least often by those making \$40,000 to 59,999, and

- Those with children in the age 0 through 4 or both age groups, vs. those with children age 5 through 12 only.
- Cost of care was a concern for all parents surveyed, but especially so for those with younger children (age 0 through 4 vs. those with children of mixed ages or those with school-age children). Also, concern about finding affordable care was a greater concern for those with lower income.
- Finding child care that fits the parents' working schedule is of greater concern for parents with younger children (ages 0 through 4) vs. those with school-age children.
- Financial hardships due to child care costs were more often reported by:
 - Non-Hispanic Black and American Indian/Alaska Native (AIAN) parents,
 - Families with moderately low income,
 - Single working parent households, and
 - Families with children age 0 through 4.
- Financial assistance with child care costs is not universally available:
 - Families at mid-levels of household income were least likely to receive some form of assistance, likely due to what form of assistance (public vs. private/employer) is available for low-income families as compared with high-income families.
 - Families in rural areas were somewhat less likely to receive some form of financial assistance than those in urban areas. Previous research has sometimes shown that this is due to limited availability of regulated child care that is eligible for public subsidy in rural areas.

These findings speak directly to the economic impact of lost time at work, lowered participation in the workforce, and workforce turnover due to child care issues. The economic impact of inaccessibility of child care, described in this report, is the “bottom line” of the effect of limited child care access. The economic impact analysis demonstrates that inaccessibility, or lack of access to child care, has a direct effect of the lost wages due to lost time at work and remaining out of the workforce, the impact on productivity from both lost time at work and greater employee turnover, and in the case of state government, the impact that lost wages and less productivity have on tax revenue. While child care challenges are seen in their effect on individual families' lives and day-to-day choices, the resulting effect at the state economy level in the form of reduced total amount of tax revenue realized by Washington state ranges from roughly \$1.2 billion in 2019 to \$935 million in 2028, **and an annual average of \$1.03 billion.** The analysis incorporated recent projections of GDP adjusted due to COVID-19, but the full impact of lasting effects of the recent disruptions caused by shutdowns due to COVID-19 are as yet unknown. However, the sheer size of this impact demonstrates the need for public solutions that increase support to working families and to the child care industry as a whole as a major component of a healthy Washington state economy.

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Washington Child Care Industry Assessment Volume II-- Appendices

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Submitted to:
Washington State Department of
Commerce
Child Care Collaborative Task
Force

Submitted by:
ICF

Appendices

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Appendix A. Parent Survey

2020 Washington Child Care Industry Assessment Parent Survey Final Web Panel Questionnaire

PROGRAMMING NOTES

TEXT FORMATTING KEY

[PROGRAMMING NOTES, LOGIC, AND SKIPS ARE IN SQUARE BRACKETS AND ALL CAPS]

WEB SURVEY APPEARANCE
Optimization for best viewing and ease of use on multiple devices (desktop, laptop, tablet, smartphone)
Questions can be skipped unless otherwise noted. One warning message appears in red: “You skipped this question and the information is very important for our research. Are you sure you want to move forward?” Respondent may proceed to the next question if warning is ignored.
Suspend text: Your responses have been saved. When you are ready to continue the survey, please return to the link provided in the message you received. You will then be taken to the point where you stopped. You may now exit this page.

Informed Consent

You are invited to take part in a child care research study, conducted by the survey research organization ICF. Your answers will help us understand the child care needs and preferences of families in Washington State. The results will be used by the Washington Department of Commerce to consider future programs and policies to improve access to affordable, quality child care for working families.

Your participation is voluntary. There is no penalty if you do not participate. You can skip questions you don't want to answer or end the survey at any time. The survey should take no more than 10 minutes to complete and your responses are confidential. This survey has been reviewed by ICF's Institutional Review Board (IRB) for the Protection of Human Subjects and the Washington State Institutional Review Board, and involves no foreseeable risk to participants. If you have any questions about the survey or about research subjects' rights, please contact ICF at WACHildCareSurvey@icfsurvey.com.

If you consent to participate, please click on the continue button below.

- 01 Yes, I consent
- 02 No

INSTRUCTIONS

Please use the NEXT button to navigate through the survey. Once you select your answer, you also can move to the next question by pressing ENTER.

Do not use the BACK button of your browser as this may cause you to exit the survey and your responses will be lost.

You can exit the survey at any time and re-enter later using the URL and access code you received in your letter. Use the STOP button to exit.

Haga clic en el botón SIGUIENTE para avanzar en la encuesta. Una vez que seleccione su respuesta, también puede pasar a la pregunta siguiente presionando ENTER (Introducir).

No use el botón "ANTERIOR" (botón de retroceso) de su navegador, pues esto podría hacerle salir del cuestionario.

Puede salir de la encuesta en cualquier momento y volver a ingresar más tarde usando el enlace URL y el código de acceso que recibió en su carta. Use el botón SALIR para salir

SECTION 1: Eligibility and demographics.

[RECORD ELAPSED TIME IN SECTION]

TIMER1

[ASK ALL]

INT02.

First, we'd like to ask you some questions about yourself.

[ASK ALL]

Q1.

Are you a resident of Washington State?	
01	Yes
02	No

If Q1=02, terminate survey]

TERM1.

We are sorry, for this study we are only interviewing residents of Washington State.

[ask if Q1=01]

Q2.

How many DEPENDENT CHILDREN do you have who are twelve years old or younger who live with you for at least 3 months out of the year? Please include step-children or children for which you are a legal guardian.	
01	No children
02	1 child
03	2 children
04	3 children
05	4 or more children

[if Q2 = 01; terminate survey]

TERM2.

We are sorry, for this study we are only interviewing people who live with a child aged twelve years or younger at least 3 months out of the year.

[ASK ALL]

Q3.

Are you:	
01	Male
02	Female
03	Non-binary/ X
04	Prefer not to say

[ASK ALL]

Q4.

What is your age?	
_____	Years [validate between 15 & 90]

[if Q4 = < 18; terminate survey]

TERM3.

We are sorry, for this study we are only interviewing people who are at least 18 years of age.

Calculate AGE variable from Q4 Birthday.

[ASK ALL]

Q5.

What is your current MARITAL STATUS?	
01	Married or in a domestic partnership
02	Not married, and living with a partner
03	Not married, and not living with a partner
99	Prefer not to answer

[ASK ALL]

Q6.

What best describes your employment status today?	
01	Employed full-time (At least 32 hours per week)
02	Employed part-time (less than 32 hours per week)
03	Unemployed and seeking employment
04	Unemployed and not seeking employment
05	A student
06	Retired
07	Unable to work due to disability
08	Homemaker or parent who stays at home
09	Other
99	Prefer not to answer

[Ask if Q6 = 01,02 or 3]

Q7.

Which of the following best describes the industry in which you work or have worked in during the past 12 months?	
01	Natural resources and mining
02	Construction
03	Manufacturing
04	Trade, transportation, and utilities
05	Information technology
06	Financial activities
07	Professional and business services
08	Education and health services
09	Leisure and Hospitality
10	Other services
11	Government
99	Prefer not to answer

[Ask if Q6 = 01,02 or 3]

Q8.

Which of the following best describes your primary occupation?	
01	Computer and Mathematical Occupations
02	Healthcare Practitioners and Technical Occupations
03	Architecture and Engineering Occupations
04	Construction and Extraction Occupations
05	Installation, Maintenance, and Repair Occupations
06	Life, Physical, and Social Science Occupations
07	Office and Administrative Support Occupations
08	Business and Financial Operations Occupations
09	Farming, Fishing, and Forestry Occupations
10	Community and Social Service Occupations
11	Food Preparation and Serving Related Occupations
12	Healthcare Support Occupations

13	Legal Occupations
14	Production Occupations
15	Arts, Design, Entertainment, Sports, and Media Occupations
16	Education, Training, and Library Occupations
17	Personal Care and Service Occupations
18	Sales and Related Occupations
19	Management Occupations
20	Protective Service Occupations
21	Building and Grounds Cleaning and Maintenance Occupations
22	Transportation and Materials Moving Occupations
99	Prefer not to answer

[Ask All]

[MULTIPLE SELECTION]

Q9.

What is your RACE and ETHNICITY? Please select all that apply.	
01	American Indian or Alaska Native
02	Asian or Pacific Islander
03	Black or African American
04	White or Caucasian
05	Hispanic or Latino/a
99	Prefer not to answer

[Ask All]

Q10.

What is the highest level of EDUCATION you have completed?	
01	Less than high school
02	High school graduate/GED
03	Some college but no degree
04	Associate's Degree (AA, AS, AAS, ATA)
05	Bachelor's Degree (BA, BS)
06	Graduate courses, no degree
07	Graduate degree – e.g., Master's Degree (MA, MS), Doctorate (Ph.D, Ed.D.)
08	Professional Degree (MD., DDS, JD/LLB; ETC.)
09	Trade/vocational certificate or apprenticeship program
99	Prefer not to answer

FAMILY DEMOGRAPHICS

[ASK ALL]

Q11.

Before taxes, what is your estimated ANNUAL HOUSEHOLD INCOME?	
01	Less than \$20,000
02	\$20,000 - \$39,999
03	\$40,000 - \$59,999
04	\$60,000 - \$79,999
05	\$80,000 - \$99,999
06	\$100,000 - \$149,999
07	\$150,000 - \$199,999
08	\$200,000 or more
99	Prefer not to answer

[ASK ALL]

Q12.

What is your HOME ZIP CODE?	
-----	[validate 5 digits]
99	Prefer not to answer

CHILD AND CHILD CARE INFORMATION

[ASK ALL]

CCIntr0.

Now we'd like to ask some questions about your (IF Q2 = 02, "child", IF Q2>02, "children",) and child care arrangements.

[Loop over questions 13-15 for each child: "X" = Youngest, Second Youngest, Third Youngest, or Fourth Youngest. *Note programming language that provides alternative language if respondent indicates they only have 1 child>]*

[Q13 LOOP]

If Q2 = 02, Loop once through Q13_1, Q14A-H_1, Q15A-H_1, Q, Q16A-H_1, Q17_1, Q18_1

IF Q2 > 02, loop through question series, advancing the underscored number—for example, Q13_2 for the second youngest child in second loop.]

[text inserts: if IF Q2 = 02, "child",

IF Q2 > 02, Loop 1 = "youngest child", Loop 2 = "second youngest child", Loop 3 = "Third Youngest child, loop 4= "fourth youngest child")

[Ask All]

Q13_1.

How old is your (IF Q2 = 02, "child", IF Q2>02, "youngest child",) aged 12 years or younger? Please note if the child is an infant, write "0" in the box below.	
_____ year(s)	[validate numeric range 0-12]
99	Prefer not to answer

[Ask All]

Allow respondent to advance without selecting options, code missing as 99

Q14_1.

Please answer the following questions for your (IF Q2 = 02, "child", IF Q2>02, "youngest child",) year old child.

Q14_1 grid: Last year (i.e., 2019), did you <u>consistently</u> use any of the following child care arrangements?	
Q14A. Stay at home with parent, step-parent or guardian	01 Yes 02 No
Q14B. Stay with another family member	01 Yes 02 No
Q14C. Stay with a neighbor or friend	01 Yes 02 No
Q14D. Stay with nanny or au-pair	01 Yes 02 No
Q14E. Stay at home alone	01 Yes 02 No
Q14F. Go to licensed family child care home	01 Yes 02 No
Q14G. Go to licensed child care center	01 Yes 02 No
Q14H. Go to a Head Start or ECEAP program	01 Yes 02 No
Q14I. Go to another preschool program	01 Yes 02 No
Q14J. Go to a before or after-school program	01 Yes 02 No
Q14K. Go to another type of program or activity, such as a library, sports/athletic program or club	01 Yes 02 No

[Ask if Q14A_1= 01]

Q15A_1.

How many hours per week does this child use this type of care?

Stay at home with parent, step-parent or guardian
_____ Hours (Range 0 – 280)
99 Prefer not to answer [mutually exclusive]

[Ask if Q14B_1= 01]

Q15B_1.

How many hours per week does this child use this type of care? Stay with another family member
_____ Hours (Range 0 – 280)
99 Prefer not to answer [mutually exclusive]

[Ask if Q14C_1= 01]

Q15C_1.

How many hours per week does this child use this type of care? Stay with a neighbor or friend
_____ Hours (Range 0 – 280)
99 Prefer not to answer [mutually exclusive]

[Ask if Q14D_1= 01]

Q15D_1.

How many hours per week does this child use this type of care? Stay with nanny or au-pair
_____ Hours (Range 0 – 280)
99 Prefer not to answer [make mutually exclusive]

[Ask if Q14E_1= 01]

Q15E_1.

How many hours per week does this child use this type of care? Stay at home alone
_____ Hours (Range 0 – 280)
99 Prefer not to answer [make mutually exclusive]

[Ask if Q14F_1= 01]

Q15F_1.

How many hours per week does this child use this type of care? Go to licensed family child care home
_____ Hours (Range 0 – 280)
99 Prefer not to answer [make mutually exclusive]

[Ask if Q14G_1= 01]

Q15G_1.

How many hours per week does this child use this type of care? Go to licensed child care center
_____ Hours (Range 0 – 280)
99 Prefer not to answer [make mutually exclusive]

[Ask if Q14H_1= 01]

Q15H_1.

How many hours per week does this child use this type of care? Go to a Head Start or ECEAP program
_____ Hours (Range 0 – 280)
99 Prefer not to answer [make mutually exclusive]

[Ask if Q14I_1= 01]

Q15I_1.

How many hours per week does this child use this type of care? Go to another preschool program
_____ Hours (Range 0 – 280)
99 Prefer not to answer [make mutually exclusive]

[Ask if Q14J_1= 01]

Q15J_1.

How many hours per week does this child use this type of care? Go to a before or after-school program
_____ Hours (Range 0 – 280)
99 Prefer not to answer [make mutually exclusive]

[Ask if Q14K_1= 01]

Q15K_1.

How many hours per week does this child use this type of care? Go to another type of program or activity, such as a library, sports/athletic program or club
_____ Hours (Range 0 – 280)
99 Prefer not to answer [make mutually exclusive]

[Ask if Q14A_1= 01]

Q16A_1.

How much do you pay per week for child care for this child? Stay at home with parent, step-parent or guardian
\$_____ (Range 0 – 9,999)
99 Prefer not to answer [make mutually exclusive]

[Ask if Q14B_1= 01]

Q16B_1.

How much do you pay per week for child care for this child? Stay with another family member
\$_____ (Range 0 – 9,999)
99 Prefer not to answer [make mutually exclusive]

[Ask if Q14C_1= 01]

Q16C_1.

How much do you pay per week for child care for this child? Stay with a neighbor or friend
\$_____ (Range 0 – 9,999)
99 Prefer not to answer [make mutually exclusive]

[Ask if Q14D_1= 01]

Q16D_1.

How much do you pay per week for child care for this child? Stay with nanny or au-pair
\$_____ (Range 0 – 9,999)
99 Prefer not to answer [make mutually exclusive]

[Ask if Q14E_1= 01]

Q16E_1.

How much do you pay per week for child care for this child? Stay at home alone
\$_____ (Range 0 – 9,999)
99 Prefer not to answer [make mutually exclusive]

[Ask if Q14F_1= 01]

Q16F_1.

How much do you pay per week for child care for this child? Go to licensed family child care home
\$_____ (Range 0 – 9,999)
99 Prefer not to answer [make mutually exclusive]

[Ask if Q14G_1= 01]

Q16G_1.

How much do you pay per week for child care for this child? Go to licensed child care center
\$_____ (Range 0 – 9,999)
99 Prefer not to answer [make mutually exclusive]

[Ask if Q14H_1= 01]

Q16H_1.

How much do you pay per week for child care for this child? Go to Head Start or ECEAP program
\$_____ (Range 0 – 9,999)
99 Prefer not to answer [make mutually exclusive]

[Ask if Q14I_1= 01]

Q16I_1.

How much do you pay per week for child care for this child? Go to another preschool program
\$_____ (Range 0 – 9,999)
99 Prefer not to answer [make mutually exclusive]

[Ask if Q14J_1= 01]

Q16J_1.

How much do you pay per week for child care for this child? Go to a before or after-school program
\$_____ (Range 0 – 9,999)
99 Prefer not to answer [make mutually exclusive]

[Ask if Q14K_1= 01]

Q16K_1.

How much do you pay per week for child care for this child? Go to another type of program or activity, such as a library, sports/athletic program or club
\$_____ (Range 0 – 9,999)
99 Prefer not to answer [make mutually exclusive]

[Ask All]

Q17INT

Did you use a different child care arrangement for this child last summer?	
01 Yes	
02 No	
99 Prefer not to answer	

[Ask if Q17INT=01]

Q17_1.

Q17_1 grid: Did you use any of the following child care arrangements for this child last summer?	
Q17A. Stay at home with parent, step-parent or guardian	01 Yes 02 No
Q17B. Stay with another family member	01 Yes 02 No
Q17C. Stay with a neighbor or friend	01 Yes 02 No
Q17D. Stay with nanny or au-pair	01 Yes 02 No
Q17E. Stay at home alone	01 Yes 02 No
Q17F. Go to licensed family child care home	01 Yes 02 No
Q17G. Go to licensed child care center	01 Yes 02 No
Q17H. Go to a Head Start or ECEAP program	01 Yes 02 No
Q17I. Go to another preschool program	01 Yes 02 No
Q17J. Go to a before or after-school program I	01 Yes 02 No
Q17K. Go to another type of program or activity, such as a library, sports/athletic program or club	01 Yes 02 No
Q17L. Go to full-day school/age or day camp	01 Yes 02 No

[IF Q2 = 02, END LOOP, IF Q2 = 03 PROCEED TO q14_2.
 AFTER Q18_2, IF Q2_03, END LOOP, IF Q2=-4 PROCEED TO Q14_3 >

JOB CHALLENGES RELATED TO CHILD CARE

[Ask All]

Q19.

In the past 12 months, have you or your spouse or partner had to take time off due to child care issues?	
01	Yes
02	No
99	Prefer not to answer

[Ask All]

Q20.

In the past 12 months, have you or your spouse or partner reduced the number of hours or days you work due to child care issues?	
01	Yes
02	No
99	Prefer not to answer

[Ask IF Q19=01][No soft validation text if blank]

Q19A.

In the past 12 months, how many hours or days have you or your spouse or partner taken paid time off due to child care issues?	
Q19A	1. Respond in hours
	2. Respond in days

[Ask IF Q19A=01]

Q19AH	number of paid hours taken off
-------	--------------------------------

[Ask IF Q19A=02]

Q19AD	number of paid days taken off
-------	-------------------------------

[Ask IF Q19=01][No soft validation text if blank]

Q19B.

In the past 12 months, how many hours or days have you or your spouse or partner taken unpaid time off due to child care issues?	
	01 Respond in hours
	02 Respond in days

[Ask IF Q19B=01]

Q19BH	number of unpaid hours taken off
-------	----------------------------------

[Ask IF Q19B=02]

Q19BD	number of unpaid days taken off
-------	---------------------------------

[Ask IF Q20=01]

[No soft validation text if blank]

Q20A.

In the past 12 months, how many work hours or days have you or your spouse or partner reduced due to child care issues?	
	01 Respond in hours
	02 Respond in days

[Ask IF Q20A=01]

Q20AH	Total number of reduced work hours in past 12 months

[Ask IF Q20A=02]

Q20AD	Total number of reduced work days in past 12 months
-------	---

[Ask IF Q6=03]

Q21.

If you are currently unemployed and seeking employment, is child care an issue that is preventing you from obtaining employment?	
01	No. Child care is not an issue.
02	Yes. I would like part-time employment, but child care is an issue.
03	Yes. I would like full-time employment, but child care is an issue.
99	Prefer not to answer

[Ask IF Q6=01, 02, 03]

Q22.

In the past 12 months, have you turned down a promotion or job offer due to child care issues?	
01	Yes
02	No
99	Prefer not to answer

CHILD CARE BARRIERS/CHALLENGES

[ASK ALL]

[MUL 12]

Q23.

Which of the following child care issues has had an effect on your family over the past year? Please select all that apply.	
01	Finding child care that fits our work schedule.
02	Finding affordable care.
03	Finding high quality care.
04	Finding back up child care.
05	Finding care for a sick child.
06	Finding care for my child with special needs.
07	Finding care that is located close to my home or work.
08	Finding care when school is closed.
09	Finding transportation to and/or from child care.
10	Finding information on child care options
11	Other (Specify) _____
12	None of the above (MUTUALLY EXCLUSIVE)
99	Prefer not to answer

[Ask All]

Q24.

How often is your ability to do your job negatively affected by your child care arrangement(s)?	
01	Never
02	Rarely
03	Sometimes
04	Often
05	Always
99	Prefer not to answer

[Ask All]

Q25.

Has your household experienced any financial hardship or made financial changes as a result of the cost of child care?	
01	Yes
02	No
99	Prefer not to answer

[ASK ALL]

[MUL: 8]

Q26.

Does your family receive assistance from any of the following? Please select all that apply.	
01	Assistance from a public benefit program (like Head Start, ECEAP, Working Connections or city-funded program)
02	Free program offered through a public school
03	Scholarship, financial aid, sliding-fee-scale, or reduced fee offered by child care provider
04	Employer offers flexible spending accounts that can be used for child care
05	Employer pays part or all of the cost of child care
06	Employer offers on-site child care at free or reduced cost
07	Relative or friend helps to pay for child care
08	No assistance from any source (MUTUALLY EXCLUSIVE)
99	Prefer not to answer

PARENT NEEDS AND PREFERENCES

[ASK ALL]

Q27.

I prefer child care that is provided in:	
01	A child care center
02	A family member or friend's home
03	Another person's home
04	My own home
05	A licensed child care program
06	A program at a public school
07	No preference
99	Prefer not to answer

[ASK ALL]

Q28.

Do you have a need for child care outside of regular/traditional daytime hours (6:00am – 6:00pm Monday thru Friday)?	
01	Yes
02	No
99	Prefer not to answer

[ASK if Q28=01]

Q29.

When do you have a need for child care outside of regular/traditional hours?	
01	Evenings (6:00pm to 9:00pm)
02	Nights (9:00pm to 6:00am)
03	Weekend days
04	Weekend evenings or nights
05	Other (Specify) _____
99	Prefer not to answer

ASK ALL]

Q30.

Approximately how many minutes does it take to transport your child(ren) to and from (round trip) child care each day?	
01	less than 5 minutes
02	Between 5 and 60 minutes (specify) _____ (Range 5 - 60)
03	More than 60 minutes
99	Prefer not to answer

[ASK ALL]

[MUL 8]

Q31.

Please select all the transportation options your family uses to transport your child(ren) to and from child care. (Please Select all that apply.)	
01	Parent or other adult drives child(ren)
02	Friend/family member or neighbor drives child(ren)
03	Carpool/Vanpool
04	Public Transportation (bus, train, ferry, etc.)
05	Bicycle
06	Walk
07	A care giver comes to our home for child care
08	Other (Specify): _____
99	Prefer not to answer

DEMOGRAPHIC AND OCCUPATIONAL INFORMATION (SPOUSE OR DOMESTIC PARTNER)

[Only present this page if member is married or in partnership (from Q5)]

[ASK if Q5=01]

Q32.

What best describes your spouse or partner's employment status today?	
01	Employed full-time
02	Employed part-time
03	Unemployed and seeking employment
04	Unemployed and not seeking employment
05	A student
06	Retired
07	Unable to work due to disability
08	Homemaker or parent who stays at home
09	Other
99	Prefer not to answer

[ASK if Q32=01, 02, 03]

Q33.

Which of the following best describes the industry in which your spouse or partner works or has worked in during the past 12 months?	
01	Natural resources and mining
02	Construction
03	Manufacturing
04	Trade, transportation, and utilities
05	Information technology
06	Financial activities
07	Professional and business services
08	Education and health services
09	Leisure and hospitality
10	Other services
11	Government
99	Prefer not to answer

ASK if Q32=01, 02, 03]

Q34.

Which of the following best describes your spouse or partner's primary occupation?	
01	Computer and Mathematical Occupations
02	Healthcare Practitioners and Technical Occupations
03	Architecture and Engineering Occupations
04	Construction and Extraction Occupations
05	Installation, Maintenance, and Repair Occupations
06	Life, Physical, and Social Science Occupations
07	Office and Administrative Support Occupations

08	Business and Financial Operations Occupations
09	Farming, Fishing, and Forestry Occupations
10	Community and Social Service Occupations
11	Food Preparation and Serving Related Occupations
12	Healthcare Support Occupations
13	Legal Occupations
14	Production Occupations
15	Arts, Design, Entertainment, Sports, and Media Occupations
16	Education, Training, and Library Occupations
17	Personal Care and Service Occupations
18	Sales and Related Occupations
19	Management Occupations
20	Protective Service Occupations
21	Building and Grounds Cleaning and Maintenance Occupations
22	Transportation and Materials Moving Occupations
99	Prefer not to answer

[ASK if Q5=01]

Q35.

What is your spouse or partner's RACE and ETHNICITY? Please select all that apply.	
01	American Indian or Alaska Native
02	Asian or Pacific Islander
03	Black or African American
04	White or Caucasian
05	Hispanic or Latino/a
99	Prefer not to answer [MUTUTALLY EXCLUSIVE]

[ASK if Q5=01]

Q36.

What is the highest level of EDUCATION your spouse or partner has completed?	
01	Less than high school
02	High school graduate/GED
03	Some college but no degree
04	Associate's Degree (AA, AS, AAS, ATA)
05	Bachelor's Degree (BA, BS)
06	Graduate courses, no degree
07	Graduate degree – e.g., Master's Degree (MA, MS), Doctorate (Ph.D, Ed.D.)
08	Professional Degree (MD., DDS, JD/LLB; ETC.)
09	Trade/vocational certificate or apprenticeship program
99	Prefer not to answer

CLOSE.

Thank you for your time! That was our last question for the Washington Child Care Survey.

Appendix B. Parent Survey Detail Tables

Table B.1. Comparison of State Population and Survey Respondent Demographics

	State Population	Survey Respondents
Gender		
Male	46%	46.2%
Female	54%	53.5%
Non-binary/X		0.1%
Education		
Middle School / Some High School	11%	4.4%
High school graduate	22%	22.2%
Other post high school vocational training		5.7%
Some college or university	27%	17.4%
College graduate with a 2 year degree	22%	33.40%
College graduate with a 4 year degree		
Completed some postgraduate	18%	17.30%
Master's degree		
Doctorate		
Race/Ethnicity		
African American	5%	6.3%
Asian/Asian American	15%	16.6%
Caucasian	58%	63.0%
Native American, Inuit, Aleut	--	3.2%
Hispanic or Latino/a	17%	17.2%
Other	6%	

Table B.2. Number of Children Under 12 Years of Age in Family

Q2 How many DEPENDENT CHILDREN do you have who are 12 years old or younger who live with you for at least 3 months out of the year? Include step-children or children for which you are a legal guardian.		
	Count	Weighted Percent
1 child	701	48.9%
2 children	590	37.1%
3 children	168	9.5%
4 or more children	77	4.4%

Table B.3. Respondent Age Range

Q4 What is your age, in years?		
	Count	Weighted Percent
18–24	102	6.6%
25–34	574	32.4%
35–49	780	52.0%
50–64	75	8.5%
65–90	5	0.5%

Table B.4. Current Marital Status

Q5 Marital Status		
	Count	Weighted Percent
Married or in a domestic partnership	1034	79.4%
Not married, and living with a partner	241	10.5%
Not married, and not living with a partner	239	10.0%

Table B.5. Current Employment Status of Respondent and Spouse/Partner

Q6 What best describes your employment status today?				
	Respondent		Spouse/Partner	
	Count	Weighted Percent	Count	Weighted Percent
Employed full-time (At least 32 hours per week)	808	56.1%	750	69.5%
Employed part-time (less than 32 hours per week)	189	11.7%	93	9.7%
Unemployed and seeking employment	110	6.9%	31	4.3%
Unemployed and not seeking employment	33	1.7%	20	2.6%
A student	38	1.9%	11	1.1%
Retired	9	0.9%	12	1.3%
Unable to work due to disability	50	3.8%	17	2.2%
Homemaker or parent who stays at home	261	15.3%	76	8.4%
Other	26	1.6%	11	0.9%

Table B.6. Employment Status of Parents by Household Income

Family work status							
		N	1 Parent, unemployed	1 Parent, Employed (FT/PT)	2 Parents, 0 employed	2 Parents, 1 employed	2 Parents, 2 employed
Total	Total	1478	14.68	18	6.16	18.54	42.63
Household Income	Less than \$20,000	168	6.09	2.23	1.49	1.01	0.54
	\$20,000 - \$39,999	236	4.8	4.74	1.35	2.44	2.64
	\$40,000 - \$59,999	237	1.42	4.74	1.29	3.11	5.48
	\$60,000 - \$79,999	209	1.15	2.57	0.74	3.92	5.75
	\$80,000 - \$99,999	182	0.61	2.17	0.27	2.57	6.7
	\$100,000 - \$149,999	254	0.34	0.95	0.74	4.06	11.1
	\$150,000 - \$199,999	106	0.27	0.41	0.27	0.74	5.48
	\$200,000 or more	86	0	0.2	0	0.68	4.94

Table B.7. Current Industry of Employment of Respondent and Spouse/Partner

Q7 Which of the following best describes the industry in which you work or have worked in during the past 12 months?				
	Respondent		Spouse/Partner	
	Count	Weighted Percent	Count	Weighted Percent
Natural resources and mining	10	1.0%	10	1.0%
Construction	80	8.3%	97	10.7%
Manufacturing	74	8.7%	45	6.8%
Trade, transportation, and utilities	51	6.1%	60	7.2%
Information technology	121	11.8%	123	13.1%
Financial activities	61	5.9%	48	5.8%
Professional and business services	71	6.3%	77	9.1%
Education and health services	195	15.4%	108	13.6%
Leisure and Hospitality	63	5.4%	32	4.6%
Other services	277	24.7%	175	21.0%
Government	64	6.4%	68	7.1%

Table B.8. Current Primary Occupation of Respondent and Spouse/Partner

Q8 Which of the following best describes your primary occupation?				
	Respondent		Spouse/Partner	
	Count	Weighted Percent	Count	Weighted Percent
Computer and Mathematical	89	9.4%	86	9.9%
Healthcare Practitioners and Technical	79	6.5%	44	5.8%
Architecture and Engineering	22	2.7%	28	2.9%
Construction and Extraction	51	5.3%	78	9.3%
Installation, Maintenance, and Repair	33	3.2%	37	4.5%
Life, Physical, and Social Science	18	1.6%	9	1.3%
Office and Administrative Support	105	10.1%	52	7.0%
Business and Financial Operations	73	6.6%	77	8.4%
Farming, Fishing, and Forestry	5	0.8%	9	1.5%
Community and Social Service	21	1.8%	15	1.8%
Food Preparation and Serving Related	61	5.8%	26	3.8%
Healthcare Support	52	4.4%	40	6.6%
Legal	14	1.4%	11	0.8%
Production	31	3.7%	15	2.0%
Arts, Design, Entertainment, Sports, and Media	18	1.8%	17	1.8%
Education, Training, and Library	77	5.3%	48	5.6%
Personal Care and Service	37	3.7%	18	2.6%
Sales and Related	106	10.4%	56	7.3%
Management	76	7.6%	70	9.7%
Protective Service	16	1.7%	11	1.1%
Building and Grounds Cleaning and Maintenance	11	1.4%	6	0.7%
Transportation and Materials Moving	39	4.6%	42	5.6%

Table B.9. Race and Ethnicity of Respondent and Spouse/Partner

Q9 What is your RACE and ETHNICITY? Select all that apply.				
	Respondent		Spouse/Partner	
	Count	Weighted Percent	Count	Weighted Percent
American Indian or Alaska Native	58	3.2%	18	1.8%
Asian or Pacific Islander	189	16.6%	130	16.2%
Black or African American	99	6.3%	50	5.4%
White or Caucasian	1124	63.0%	768	66.9%
Hispanic or Latino/a	139	17.2%	85	12.9%

Table B.10. Highest Level of Education Completed for Respondent and Spouse/Partner

Q10 What is the highest level of EDUCATION you have completed?				
	Respondent		Spouse/Partner	
	Count	Weighted Percent	Count	Weighted Percent
Less than high school	35	4.4%	25	3.8%
High school graduate/GED	283	22.2%	177	21.4%
Some college but no degree	323	17.4%	150	15.6%
Associate's Degree (AA, AS, AAS, ATA)	177	10.1%	114	11.2%
Bachelor's Degree (BA, BS)	339	23.0%	264	23.7%
Graduate courses, no degree	28	1.2%	24	1.7%
Graduate degree - e.g., Master's Degree (MA, MS), Doctorate (Ph.D., Ed.D.)	215	12.3%	182	15.3%
Professional Degree (MD., DDS, JD/LLB; ETC.)	74	3.8%	61	4.1%
Trade/vocational certificate or apprenticeship program	52	5.7%	26	3.3%

Table B.11. Child Care Arrangements by Child

Q14 Last year (i.e., 2019), did you consistently use any of the following child care arrangements?													
		N	Stay at home with parent, step-parent or guardian	Stay with another family member	Stay with a neighbor or friend	Stay with nanny or au-pair	Stay at home alone	Go to licensed family child care home	Go to licensed child care center	Go to a Head Start or ECEAP program	Go to another preschool program	Go to a before or after-school program	Go to another type of program or activity, such as library, sports or club
Total	Total	2665	77	41.5	13.5	8	9.2	9.2	16.6	4.9	9.9	17.1	25.4
Parent Race / Ethnicity	Hispanic	234	81.6	48.6	14	5.3	9.4	4.9	10.4	1.7	8	11.9	25.1
	NH white	1857	77.9	39.4	15	9.5	10.9	10.9	18.5	5.1	9.7	19.3	25.9
	NH Black	128	58.8	36.3	8.1	11.5	8.1	6.4	23.3	10.2	16.3	19.5	25.1
	NH API	258	72.9	39.8	6.4	5.2	3.1	9	13.7	3.8	10.5	13.2	23.8
	NH Other	145	80	56.1	21.4	2.4	4.8	7.5	19.5	13.7	8.6	19.9	24.2
Household Income	Less than \$20,000	267	75.5	47.7	13	0.8	7.7	3.2	10.2	7.9	5.6	7.7	14
	\$20,000 - \$39,999	422	81.1	42.1	16.8	3.9	4.2	7.2	14.9	4.6	3.4	16.7	19.4
	\$40,000 - \$59,999	420	81.9	38.9	12.6	4.1	8.3	5.6	12.2	4.2	11.3	16.5	24.1
	\$60,000 - \$79,999	352	76.1	40.6	9.3	8.5	7.6	6.7	12.9	4.4	9.8	8.7	20.8
	\$80,000 - \$99,999	349	75.1	42.2	11.3	8.5	10.2	8	13.3	4.8	8.3	17.1	19.5
	\$100,000 - \$149,999	457	76.6	43.2	15.8	10.4	13	11	18.5	4	12.5	18.4	34.1
	\$150,000 - \$199,999	176	69.4	50.2	13.2	20.6	8.5	21.4	28.8	4.6	18.9	27.9	39.8
	\$200,000 or more	149	68.9	33.4	19.9	18.1	20.4	28.5	45.6	11.1	16.5	42.4	51.8
Urban / Rural	Rural Area	901	78.7	43.7	14.8	4.1	8.3	6.7	11	3	8.3	11.5	21.8
	Urbanized Area	1679	76.4	41.2	13	9.6	9.4	10.5	19.1	5.9	10.4	19.6	26.5
Parent Highest Education	High School or less	635	79.1	45.6	12.7	3.5	7.3	3	9.9	5.3	6.7	11.4	20.3
	Some College	871	77.1	42.7	12.2	5.6	8.3	8.1	14.8	4.3	7.3	13.2	19.5
	College Grad	598	73.8	37.7	11.8	9.3	9.2	8.2	16.6	2.9	13.2	17.2	26.4
	Grad School	546	76.8	38.2	19.5	18.8	14.3	24.2	32.4	8.4	16.7	35	42.6
Parent Work Status	All parents working (FT/PT)**	1545	71.3	47	15.8	11.6	11.7	13.7	23.3	5.2	10.2	22.8	29.3
	At least one parent not working**	1083	85.4	34.8	10.5	2.9	5.7	2.9	7.6	4.7	9.8	9.6	20
	1 Parent, unemployed	366	79.6	43.3	17.2	3.7	8.1	5.3	12.5	7.8	4.8	10.7	17.3
	1 Parent, employed (FT/PT)	427	63.1	60.9	22.5	7.8	10.9	9.9	23.6	4.8	6.6	19.6	22.4
	2 Parents, 0 employed	182	90.8	29	11.5	1	3.1	3	5.7	9.3	7.7	10.9	19
	2 Parents, 1 employed	535	85.8	33.5	7.5	3.2	5.7	1.9	6.4	2	12.5	8.6	21.3
	2 Parents, 2 employed	1118	73	43.9	14.4	12.5	11.9	14.5	23.2	5.2	11	23.5	30.8
Age Group	0-4	545	77.7	34.3	10.3	9.3	0	8.2	17.2	4.2	7.3	0	9.4
	5-9	395	73.6	42.7	10.3	10.5	0	9.6	25.5	11.9	23.4	3.2	17
	10-12	1589	79.4	44.9	15.9	7	15.4	10.1	14.9	3.2	7.5	27.9	33.8

Q14 Last year (i.e., 2019), did you consistently use any of the following child care arrangements?													
	N	Stay at home with parent, step-parent or guardian	Stay with another family member	Stay with a neighbor or friend	Stay with nanny or au-pair	Stay at home alone	Go to licensed family child care home	Go to licensed child care center	Go to a Head Start or ECEAP program	Go to another preschool program	Go to a before or after-school program	Go to another type of program or activity, such as library, sports or club	
Region	CCA of Central Washington	125	80	44.8	20.6	7.9	12.1	13.6	15.4	1.4	7.2	11.3	28.5
	CCA of Eastern Washington	357	74.8	45.4	9.8	5	7	6.1	10.1	5.1	6.4	12	21.7
	CCA of King and Pierce Co	1131	77.1	42.8	14.3	11.7	9.6	13.2	21.8	6.2	14	23	31.2
	CCA of Northwest Washington	412	71.6	39.6	15.2	5.3	8.1	6.3	14.1	3.8	6.9	14.6	20.7
	CCA of Olympic Peninsula	283	83.1	35	10.6	3.8	9.1	3.6	7.1	4.1	3.7	12.7	15.6
	CCA of Southwest Washington	287	81.2	41.9	13.1	3.6	9.4	4.9	16.5	3.9	9.3	11.3	19.7

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.12. Total Number of Non-Parental Child Care Arrangements by Child

Q14 Total number of non-parental child care arrangements by child		N	0	1	2	3 or more
All	Total	2671	28.9	31.0	19.9	20.2
Race/Ethnicity	Hispanic	235	32.6	28.0	21.9	17.5
	NH white	1861	29.3	29.4	19.0	22.3
	NH Black	128	16.6	39.8	28.2	15.4
	NH API	259	29.3	39.4	16.4	14.9
	NH Other	145	15.7	33.8	25.9	24.6
Household Income	Less than \$20,000	267	34.2	32.1	22.3	11.4
	\$20,000 - \$39,999	422	36.2	29.1	16.0	18.6
	\$40,000 - \$59,999	422	33.2	30.5	18.7	17.7
	\$60,000 - \$79,999	353	32.2	33.4	19.2	15.3
	\$80,000 - \$99,999	350	28.5	35.0	20.5	16.1
	\$100,000 - \$149,999	457	20.5	32.9	22.2	24.5
	\$150,000 - \$199,999	176	15.1	22.8	26.8	35.3
	\$200,000 or more	151	12.3	27.5	15.5	44.7
Urban/Rural	Rural Area	904	33.5	32.1	16.3	18.2
	Urbanized Area	1683	26.8	30.9	21.3	21.1
Educational attainment	High School or less	634	32.6	34.5	19.2	13.6
	Some College	875	31.5	31.9	19.0	17.7
	College Grad	598	27.4	29.9	23.1	19.6
	Grad School	549	18.7	25.2	18.6	37.5
Household Employment Status	All parents working (FT/PT)*	1550	20.2	31.3	21.9	26.6
	At least one parent not working**	1084	39.5	31.5	17.4	11.6
	1 Parent, unemployed	367	37.5	22.8	21.4	18.3
	1 Parent, Employed (FT/PT)	431	17.0	30.9	25.3	26.8
	2 Parents, 0 employed	181	42.5	31.7	17.6	8.1
	2 Parents, 1 employed	536	39.2	34.7	15.7	10.3
	2 Parents, 2 employed	1119	20.9	31.4	21.1	26.5
Age Group	0-4	545	45.1	32.2	13.2	9.5
	5-9	396	23.2	37.1	22.7	17.0
	10-12	1593	22.3	29.5	22.2	26.1
Region	CCA of Central Washington	127	29.0	31.0	16.6	23.3
	CCA of Eastern Washington	357	28.1	37.6	20.1	14.3
	CCA of King and Pierce Co	1134	23.4	29.3	22.3	25.0
	CCA of Northwest Washington	413	33.5	29.9	18.6	18.0
	CCA of Olympic Peninsula	284	41.1	32.0	13.2	13.7
	CCA of Southwest Washington	287	32.3	31.9	20.0	15.8

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.13. Primary Care Arrangement (Non-Parental)

Primary non-parental care arrangement		N	Stay with another family member	Stay with a neighbor or friend	Stay with nanny or au-pair	Stay at home alone	Go to licensed family child care	Go to licensed child care center	Go to a Head Start or ECEAP program	Go to another preschool program	Go to a before or after-school program	Go to another type of program or activity, such as library, sports or club
All	Total	1614	42.2	4.3	5.4	5.0	3.9	11.5	2.4	5.5	8.2	11.5
Race/Ethnicity*	Hispanic	144	54.3	5.6	3.9	3.8	2.2	6.3	.	4.1	4.3	15.4
	NH white	1098	37.8	4.1	5.8	6.6	4.9	12.1	3.1	6.2	8.3	11.0
	NH Black	88	36.5	.	8.7	2.7	1.7	19.5	1.1	4.1	11.5	14.2
	NH API	163	45.2	4.0	5.7	1.8	2.8	12.1	1.7	5.7	10.2	10.9
	NH Other	100	49.9	7.5	0.8	1.5	3.1	12.2	6.1	1.4	11.1	6.4
Household Income*	Less than \$20,000	141	58.8	4.2	0.5	4.5	2.9	6.2	5.2	2.6	3.2	12.0
	\$20,000 - \$39,999	239	52.2	6.1	0.9	2.4	4.1	13.0	5.5	1.8	7.0	7.0
	\$40,000 - \$59,999	247	51.3	5.7	2.9	3.5	1.9	9.1	1.0	5.4	9.3	9.9
	\$60,000 - \$79,999	213	38.8	2.7	8.0	6.3	5.8	9.2	2.3	7.4	3.9	15.6
	\$80,000 - \$99,999	213	44.8	6.0	5.5	4.3	2.4	10.1	2.6	4.4	12.3	7.6
	\$100,000 - \$149,999	311	34.0	3.5	6.7	7.6	3.7	11.5	1.6	7.0	8.4	16.0
	\$150,000 - \$199,999	125	34.3	3.2	10.0	3.6	7.6	13.9	1.3	4.9	8.4	12.7
	\$200,000 or more	95	20.9	0.7	9.9	7.0	6.7	26.0	.	4.9	16.1	8.0
Urban/Rural*	Rural Area	520	47.7	4.1	2.8	6.7	4.5	8.7	2.8	6.1	4.2	12.6
	Urbanized Area	1046	40.8	4.5	6.3	4.2	3.8	12.6	2.3	5.2	9.8	10.6
Educational attainment*	High School or less	343	55.2	3.4	1.2	4.2	1.3	8.5	4.2	3.1	5.4	13.6
	Some College	544	46.9	5.2	4.7	4.8	6.1	11.1	2.3	4.9	5.1	8.9
	College Grad	370	35.2	4.6	5.9	4.3	3.5	14.2	1.2	8.0	9.8	13.2
	Grad School	355	24.4	4.1	12.6	7.1	5.6	13.4	1.3	6.7	15.5	9.3
Household Employment Status*	All parents working (FT/PT)*	1049	41.4	4.1	6.9	5.2	4.5	14.1	1.6	3.8	10.1	8.2
	At least one parent not working**	557	43.8	4.6	2.6	4.5	2.8	6.7	4.0	8.6	4.6	17.8

Primary non-parental care arrangement												
	N	Stay with another family member	Stay with a neighbor or friend	Stay with nanny or au-pair	Stay at home alone	Go to licensed family child care	Go to licensed child care center	Go to a Head Start or ECEAP program	Go to another preschool program	Go to a before or after-school program	Go to another type of program or activity, such as library, sports or club	
	1 Parent, unemployed	189	50.7	4.4	1.7	4.6	5.3	9.9	6.5	1.0	5.1	10.8
	1 Parent, Employed (FT/PT)	304	49.3	4.0	4.4	5.4	5.0	15.1	2.8	2.8	8.3	3.0
	2 Parents, 0 employed	87	41.6	8.2	.	2.8	4.8	2.8	7.6	4.1	5.4	22.6
	2 Parents, 1 employed	281	42.0	3.5	3.8	5.0	1.1	6.9	1.8	12.9	4.1	18.8
	2 Parents, 2 employed	745	39.6	4.2	7.5	5.2	4.4	13.9	1.3	4.1	10.5	9.3
Age Group*	0-4	264	50.4	4.3	7.7	.	6.0	18.8	2.1	3.7	.	7.0
	5-9	269	34.1	3.7	6.0	.	5.0	21.6	7.2	15.8	0.2	6.4
	10-12	1031	42.2	4.5	4.3	7.9	3.1	7.2	1.2	3.1	13.1	13.4
Region	CCA of Central Washington	63	42.5	7.5	10.3	8.1	1.4	6.9	2.5	4.8	0.8	15.1
	CCA of Eastern Washington	227	52.6	2.2	3.2	4.6	4.4	8.7	3.8	3.3	3.8	13.3
	CCA of King and Pierce Co	732	37.7	3.8	7.4	4.2	4.0	12.4	2.2	6.4	11.3	10.7
	CCA of Northwest Washington	244	43.6	7.6	1.3	6.6	4.0	11.9	1.0	6.8	7.4	9.7
	CCA of Olympic Peninsula	156	49.7	4.3	6.3	4.2	3.3	5.7	2.8	2.1	10.1	11.4
	CCA of Southwest Washington	154	43.5	3.8	1.9	5.9	4.9	16.3	2.9	6.0	2.8	12.0

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.14. Hours per Week Child Care is used by Child

Q15 How many hours per week does this child use any type of child care?		N	Mean	Median	SD	Min	Max
Total	Total	2437	78.3	50.0	63.4	1.0	224.0
Parent Race/Ethnicity	Hispanic	223	65.4	35.0	59.8	2.0	197.0
	NH white	1704	84.1	55.0	64.8	1.0	224.0
	NH Black	111	53.7	40.0	45.3	3.0	210.0
	NH API	230	79.3	50.0	62.8	2.0	216.0
	NH Other	135	73.4	42.0	60.6	1.0	200.0
Household Income	Less than \$20,000	229	71.6	40.0	64.4	1.0	216.0
	\$20,000 - \$39,999	394	88.5	67.0	65.2	1.0	218.0
	\$40,000 - \$59,999	386	83.6	60.0	64.9	3.0	216.0
	\$60,000 - \$79,999	327	81.1	50.0	63.4	1.0	216.0
	\$80,000 - \$99,999	312	75.3	45.0	61.7	3.0	224.0
	\$100,000 - \$149,999	427	75.6	45.0	61.1	2.0	209.0
	\$150,000 - \$199,999	163	63.4	40.0	58.3	2.0	194.0
	\$200,000 or more	136	64.8	41.0	57.2	2.0	217.0
Urban/Rural	Rural Area	815	87.0	56.0	66.1	1.0	216.0
	Urbanized Area	1548	75.1	48.0	62.0	1.0	224.0
Parent Highest Education	High School or less	557	82.9	58.0	65.8	1.0	216.0
	Some College	809	77.0	46.0	62.5	1.0	220.0
	College Grad	550	78.9	50.0	61.1	2.0	210.0
	Grad School	512	71.6	41.0	62.3	2.0	224.0
Parent Work Status	All parents working (FT/PT)*	1408	66.9	42.0	58.2	1.0	224.0
	At least one parent not working**	1008	94.8	83.0	66.6	1.0	218.0
	1 Parent, unemployed	328	82.1	64.0	63.6	1.0	216.0
	1 Parent, employed (FT/PT)	399	66.6	45.0	57.6	2.0	216.0
	2 Parents, 0 employed	168	92.5	75.0	65.4	3.0	189.0
	2 Parents, 1 employed	512	100.2	117.0	67.3	2.0	218.0
Age Group	0-4	486	92.4	70.0	64.6	2.0	216.0
	5-9	380	86.4	60.0	60.4	2.0	211.0
	10-12	1530	72.5	43.0	62.8	1.0	224.0

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.15. Hours per Week Child Stayed at Home with Parent, Step-Parent or Guardian by Child

Q15A How many hours per week does this child stay at home with parent, step-parent or guardian?		N	Mean	Median	SD	Min	Max
Total	Total	1955	73.2	40.0	64.9	1.0	168.0
Parent Race/Ethnicity	Hispanic	177	57.8	24.0	60.1	1.0	168.0
	NH white	1389	78.2	46.0	66.7	1.0	168.0
	NH Black	74	45.9	30.0	45.6	2.0	168.0
	NH API	177	82.8	63.0	64.4	2.0	168.0
	NH Other	112	61.8	40.0	59.4	1.0	168.0
Household Income	Less than \$20,000	197	61.3	24.0	63.9	1.0	168.0
	\$20,000 - \$39,999	318	87.1	72.0	66.0	1.0	168.0
	\$40,000 - \$59,999	323	76.7	40.0	66.2	1.0	168.0
	\$60,000 - \$79,999	255	80.8	56.0	65.5	1.0	168.0
	\$80,000 - \$99,999	253	68.8	40.0	64.6	1.0	168.0
	\$100,000 - \$149,999	339	68.8	40.0	61.9	2.0	168.0
	\$150,000 - \$199,999	121	52.3	24.0	56.3	1.0	168.0
	\$200,000 or more	100	51.5	20.0	56.0	1.0	168.0
Urban/Rural	Rural Area	669	85.4	75.0	66.9	1.0	168.0
	Urbanized Area	1232	68.5	40.0	63.6	1.0	168.0
Parent Highest Education	High School or less	462	76.5	40.0	65.8	1.0	168.0
	Some College	641	73.8	40.0	64.6	1.0	168.0
	College Grad	431	77.3	50.0	65.3	1.0	168.0
	Grad School	413	60.1	30.0	61.5	1.0	168.0
Parent Work Status	All parents working (FT/PT)*	1032	57.6	26.0	58.7	1.0	168.0
	At least one parent not working**	904	92.0	100.0	67.1	1.0	168.0
	1 Parent, unemployed	285	77.0	60.0	63.5	1.0	168.0
	1 Parent, employed (FT/PT)	254	62.3	30.0	61.0	2.0	168.0
	2 Parents, 0 employed	157	83.3	50.0	67.8	1.0	168.0
	2 Parents, 1 employed	462	100.3	128.0	66.7	1.0	168.0
Age Group	0-4	411	90.0	60.0	70.1	1.0	168.0
	5-9	291	80.0	48.0	64.6	1.0	168.0
	10-12	1230	66.5	40.0	61.9	1.0	168.0

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.16. Hours per Week Child Stayed with another Family Member by Child

Q15B How many hours per week does this child stay with another family member?		N	Mean	Median	SD	Min	Max
Total	Total	1096	22.4	10.0	32.5	1.0	168.0
Parent Race/Ethnicity	Hispanic	117	20.1	10.0	22.8	1.0	168.0
	NH white	735	22.3	10.0	34.9	1.0	168.0
	NH Black	47	24.4	10.0	31.6	1.0	168.0
	NH API	105	27.6	16.0	37.4	2.0	168.0
	NH Other	78	17.5	12.0	22.1	1.0	168.0
Household Income	Less than \$20,000	127	38.0	15.0	52.8	1.0	168.0
	\$20,000 - \$39,999	180	21.3	10.0	33.2	1.0	168.0
	\$40,000 - \$59,999	183	23.1	15.0	28.3	1.0	168.0
	\$60,000 - \$79,999	142	20.2	10.0	29.5	1.0	168.0
	\$80,000 - \$99,999	135	21.2	10.0	28.0	1.0	168.0
	\$100,000 - \$149,999	192	22.6	10.0	32.6	1.0	168.0
	\$150,000 - \$199,999	79	15.7	10.0	17.6	1.0	120.0
	\$200,000 or more	45	13.8	10.0	13.0	1.0	70.0
Urban/Rural	Rural Area	366	21.9	10.0	29.9	1.0	168.0
	Urbanized Area	699	22.9	10.0	34.0	1.0	168.0
Parent Highest Education	High School or less	284	27.3	15.0	38.0	1.0	168.0
	Some College	398	19.3	10.0	25.3	1.0	168.0
	College Grad	218	24.0	10.0	36.3	1.0	168.0
	Grad School	195	15.2	8.0	21.2	1.0	168.0
Parent Work Status	All parents working (FT/PT)*	712	23.6	10.0	32.9	1.0	168.0
	At least one parent not working**	376	20.3	10.0	31.7	1.0	168.0
	1 Parent, unemployed	162	24.9	15.0	34.1	1.0	168.0
	1 Parent, employed (FT/PT)	240	22.7	11.0	31.9	1.0	168.0
	2 Parents, 0 employed	51	19.6	10.0	18.8	1.0	68.0
	2 Parents, 1 employed	163	18.2	8.0	33.4	1.0	168.0
Age Group	0-4	188	24.0	14.0	32.5	1.0	168.0
	5-9	163	25.8	12.0	36.8	1.0	168.0
	10-12	728	21.0	10.0	30.8	1.0	168.0

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.17. Hours per Week Child Stayed with a Neighbor or Friend by Child

Q15C How many hours per week does this child stay with a neighbor or friend?		N	Mean	Median	SD	Min	Max
Total	Total	392	7.7	5.0	8.7	1.0	42.0
Parent Race/Ethnicity	Hispanic	37	6.5	5.0	7.6	1.0	40.0
	NH white	294	7.7	5.0	8.7	1.0	42.0
	NH Black	10	7.4	8.0	5.8	2.0	20.0
	NH API	17	11.0	6.0	9.5	1.0	40.0
	NH Other	31	8.2	3.0	10.4	1.0	40.0
Household Income	Less than \$20,000	34	7.1	5.0	8.1	1.0	40.0
	\$20,000 - \$39,999	76	6.9	5.0	7.2	1.0	40.0
	\$40,000 - \$59,999	74	7.6	4.0	9.3	1.0	40.0
	\$60,000 - \$79,999	45	11.4	8.0	11.6	1.0	40.0
	\$80,000 - \$99,999	39	11.4	6.0	10.3	1.0	41.0
	\$100,000 - \$149,999	66	6.7	4.0	7.2	1.0	42.0
	\$150,000 - \$199,999	29	5.5	4.0	5.6	1.0	20.0
	\$200,000 or more	24	6.0	3.0	8.0	1.0	40.0
Urban/Rural	Rural Area	142	6.8	5.0	7.0	1.0	41.0
	Urbanized Area	239	8.1	5.0	9.2	1.0	42.0
Parent Highest Education	High School or less	85	7.7	5.0	9.0	1.0	40.0
	Some College	134	6.9	4.0	7.0	1.0	40.0
	College Grad	70	9.0	5.0	9.6	1.0	40.0
	Grad School	102	7.5	4.0	8.9	1.0	42.0
Parent Work Status	All parents working (FT/PT)*	268	8.3	5.0	9.1	1.0	42.0
	At least one parent not working**	121	6.3	4.0	7.6	1.0	40.0
	1 Parent, unemployed	62	8.4	5.0	7.3	1.0	40.0
	1 Parent, employed (FT/PT)	98	8.9	5.0	9.3	1.0	40.0
	2 Parents, 0 employed	22	7.3	2.0	11.1	1.0	40.0
	2 Parents, 1 employed	37	3.9	2.0	3.5	1.0	17.0
	2 Parents, 2 employed	170	8.1	5.0	9.0	1.0	42.0
Age Group	0-4	60	7.2	4.0	7.3	1.0	30.0
	5-9	54	13.5	8.0	13.2	1.0	41.0
	10-12	276	6.8	5.0	7.5	1.0	42.0

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.18. Hours per Week Child Stayed with a Nanny or Au-Pair by Child

Q15D How many hours per week does this child stay with nanny or au-pair?		N	Mean	Median	SD	Min	Max
Total	Total	223	14.2	10.0	15.7	1.0	98.0
Parent Race/Ethnicity	Hispanic	15	11.9	8.0	10.2	3.0	35.0
	NH white	173	14.2	9.0	16.6	1.0	98.0
	NH Black	16	11.0	7.0	12.7	1.0	60.0
	NH API	12	22.1	20.0	16.6	6.0	70.0
	NH Other	4	4.7	4.0	2.6	2.0	9.0
Household Income	Less than \$20,000	2	6.2	5.0	1.5	5.0	8.0
	\$20,000 - \$39,999	16	16.0	11.0	13.5	1.0	40.0
	\$40,000 - \$59,999	22	16.2	10.0	16.8	2.0	60.0
	\$60,000 - \$79,999	27	11.1	9.0	10.5	1.0	35.0
	\$80,000 - \$99,999	34	21.0	10.0	25.5	2.0	98.0
	\$100,000 - \$149,999	46	13.3	8.0	13.1	1.0	72.0
	\$150,000 - \$199,999	38	13.2	8.0	13.6	2.0	70.0
	\$200,000 or more	33	11.1	5.0	12.6	1.0	48.0
Urban/Rural	Rural Area	38	10.7	8.0	10.0	1.0	60.0
	Urbanized Area	177	14.4	10.0	16.5	1.0	98.0
Parent Highest Education	High School or less	22	16.8	6.0	25.9	1.0	98.0
	Some College	42	15.0	10.0	14.2	1.0	60.0
	College Grad	61	15.2	10.0	12.3	1.0	60.0
	Grad School	98	12.3	8.0	13.3	1.0	72.0
Parent Work Status	All parents working (FT/PT)*	188	14.6	10.0	16.4	1.0	98.0
	At least one parent not working**	31	11.7	10.0	9.6	1.0	40.0
	1 Parent, unemployed	12	7.3	5.0	6.5	1.0	30.0
	1 Parent, employed (FT/PT)	35	12.7	6.0	14.1	1.0	60.0
	2 Parents, 0 employed	1	10.0	10.0	0.0	10.0	10.0
	2 Parents, 1 employed	18	13.7	10.0	10.6	1.0	40.0
	2 Parents, 2 employed	153	14.8	10.0	16.7	1.0	98.0
Age Group	0-4	48	13.8	10.0	12.1	1.0	50.0
	5-9	43	17.9	10.0	21.2	1.0	98.0
	10-12	128	13.2	8.0	14.7	1.0	78.0

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.19. Hours per Week Child Stayed at Home Alone by Child

Q15E How many hours per week does this child stay at home alone?		N	Mean	Median	SD	Min	Max
Total	Total	309	17.2	6.0	30.1	1.0	168.0
Parent Race/Ethnicity	Hispanic	26	14.3	8.0	11.8	1.0	45.0
	NH white	236	17.5	5.0	34.1	1.0	168.0
	NH Black	14	15.0	6.0	17.4	1.0	57.0
	NH API	17	25.6	20.0	27.1	2.0	100.0
	NH Other	10	14.6	5.0	28.8	1.0	100.0
Household Income	Less than \$20,000	28	14.8	10.0	12.8	1.0	40.0
	\$20,000 - \$39,999	34	14.4	10.0	17.7	2.0	100.0
	\$40,000 - \$59,999	41	26.6	5.0	47.8	1.0	168.0
	\$60,000 - \$79,999	38	18.3	10.0	23.7	1.0	100.0
	\$80,000 - \$99,999	47	23.6	7.0	41.9	1.0	168.0
	\$100,000 - \$149,999	63	11.0	5.0	14.6	1.0	70.0
	\$150,000 - \$199,999	24	9.9	2.0	16.7	1.0	60.0
	\$200,000 or more	33	17.1	4.0	29.9	1.0	120.0
Urban/Rural	Rural Area	91	22.9	8.0	42.2	1.0	168.0
	Urbanized Area	205	15.5	5.0	24.1	1.0	168.0
Parent Highest Education	High School or less	64	23.2	8.0	38.4	1.0	168.0
	Some College	96	12.1	5.0	15.0	1.0	100.0
	College Grad	54	19.3	8.0	32.1	1.0	168.0
	Grad School	95	15.0	5.0	29.7	1.0	168.0
Parent Work Status	All parents working (FT/PT)*	227	17.6	7.0	30.6	1.0	168.0
	At least one parent not working**	80	16.1	5.0	28.9	1.0	168.0
	1 Parent, unemployed	32	14.8	7.0	20.9	1.0	100.0
	1 Parent, employed (FT/PT)	54	12.2	8.0	11.1	1.0	45.0
	2 Parents, 0 employed	9	19.7	6.0	17.7	1.0	40.0
	2 Parents, 1 employed	39	15.9	5.0	33.8	1.0	168.0
Age Group	0-4	21	38.3	20.0	49.8	2.0	168.0
	5-9	10	32.2	20.0	35.2	1.0	100.0
	10-12	262	13.5	5.0	23.7	1.0	168.0

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.20. Hours per Week Child Goes to Licensed Family Child Care Home by Child

Q15F How many hours per week does this child go to licensed family child care home?		N	Mean	Median	SD	Min	Max
Total	Total	253	14.5	8.0	15.5	1.0	70.0
Parent Race/Ethnicity	Hispanic	14	9.7	8.0	8.8	1.0	36.0
	NH white	194	14.0	6.0	15.1	1.0	63.0
	NH Black	10	14.6	5.0	14.2	1.0	46.0
	NH API	21	19.7	10.0	20.3	1.0	70.0
	NH Other	11	15.2	15.0	11.1	5.0	45.0
Household Income	Less than \$20,000	14	16.0	12.0	13.0	3.0	50.0
	\$20,000 - \$39,999	26	15.5	10.0	14.0	1.0	50.0
	\$40,000 - \$59,999	26	15.1	10.0	15.4	1.0	60.0
	\$60,000 - \$79,999	24	18.0	10.0	16.3	1.0	50.0
	\$80,000 - \$99,999	25	16.8	10.0	17.3	1.0	63.0
	\$100,000 - \$149,999	55	15.2	10.0	14.3	1.0	45.0
	\$150,000 - \$199,999	41	13.0	4.0	17.0	1.0	70.0
	\$200,000 or more	42	9.5	4.0	13.4	1.0	56.0
Urban/Rural	Rural Area	54	15.7	8.0	16.4	1.0	63.0
	Urbanized Area	194	14.1	8.0	15.2	1.0	70.0
Parent Highest Education	High School or less	21	14.6	8.0	15.0	1.0	57.0
	Some College	66	19.2	12.0	15.7	1.0	50.0
	College Grad	45	17.8	10.0	16.5	1.0	60.0
	Grad School	121	10.2	5.0	13.6	1.0	70.0
Parent Work Status	All parents working (FT/PT)*	214	14.2	8.0	15.5	1.0	70.0
	At least one parent not working**	37	16.8	10.0	15.2	1.0	60.0
	1 Parent, unemployed	21	20.6	20.0	17.6	1.0	60.0
	1 Parent, employed (FT/PT)	33	17.0	10.0	15.2	1.0	50.0
	2 Parents, 0 employed	5	13.1	8.0	11.9	2.0	40.0
	2 Parents, 1 employed	11	14.7	10.0	13.1	4.0	40.0
Age Group	0-4	39	19.2	10.0	15.8	1.0	50.0
	5-9	41	23.4	20.0	19.3	1.0	70.0
	10-12	169	10.8	5.0	12.6	1.0	63.0

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.21. Hours per Week Child Goes to Licensed Child Care Center by Child

Q15G How many hours per week does this child go to licensed child care center?		N	Mean	Median	SD	Min	Max
Total	Total	456	19.6	12.0	16.8	1.0	70.0
Parent Race/Ethnicity	Hispanic	30	12.6	8.0	12.0	1.0	45.0
	NH white	330	18.5	12.0	16.3	1.0	70.0
	NH Black	31	27.6	30.0	19.2	1.0	60.0
	NH API	33	25.6	20.0	18.2	1.0	66.0
	NH Other	27	23.8	24.0	15.0	2.0	60.0
Household Income	Less than \$20,000	25	22.8	20.0	15.3	2.0	60.0
	\$20,000 - \$39,999	71	22.2	20.0	17.3	1.0	70.0
	\$40,000 - \$59,999	56	19.6	15.0	15.0	1.0	50.0
	\$60,000 - \$79,999	51	19.0	15.0	13.3	2.0	50.0
	\$80,000 - \$99,999	45	18.2	10.0	15.5	1.0	65.0
	\$100,000 - \$149,999	87	18.8	14.0	15.4	1.0	60.0
	\$150,000 - \$199,999	56	16.9	7.0	17.8	1.0	66.0
	\$200,000 or more	61	20.2	10.0	20.8	1.0	60.0
Urban/Rural	Rural Area	95	17.3	10.0	14.5	1.0	60.0
	Urbanized Area	348	20.1	14.0	17.3	1.0	70.0
Parent Highest Education	High School or less	58	23.5	20.0	16.3	1.0	70.0
	Some College	140	19.4	15.0	14.9	1.0	65.0
	College Grad	93	22.7	20.0	16.7	1.0	50.0
	Grad School	165	15.7	8.0	17.4	1.0	66.0
Parent Work Status	All parents working (FT/PT)*	378	19.2	12.0	16.8	1.0	70.0
	At least one parent not working**	78	21.5	15.0	16.2	2.0	60.0
	1 Parent, unemployed	37	26.2	20.0	17.1	2.0	60.0
	1 Parent, employed (FT/PT)	100	19.2	15.0	14.6	1.0	65.0
	2 Parents, 0 employed	11	14.7	10.0	10.7	2.0	30.0
	2 Parents, 1 employed	30	20.3	12.0	16.1	2.0	50.0
Age Group	0-4	99	23.7	21.0	16.6	1.0	60.0
	5-9	97	28.3	32.0	17.4	1.0	70.0
	10-12	257	14.1	10.0	14.2	1.0	65.0

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.22. Hours per Week Child Goes to Head Start or ECEAP Program by Child

Q15H How many hours per week does this child go to a Head Start or ECEAP program?		N	Mean	Median	SD	Min	Max
Total	Total	239	12.7	8.0	14.4	1.0	76.0
Parent Race/Ethnicity	Hispanic	14	7.7	5.0	8.2	1.0	35.0
	NH white	175	12.8	7.0	14.7	1.0	76.0
	NH Black	13	15.9	7.0	18.5	1.0	68.0
	NH API	15	9.8	5.0	11.3	1.0	40.0
	NH Other	22	17.6	12.0	15.6	2.0	75.0
Household Income	Less than \$20,000	25	16.7	12.0	15.9	2.0	75.0
	\$20,000 - \$39,999	36	13.6	12.0	9.4	1.0	40.0
	\$40,000 - \$59,999	28	14.0	10.0	13.7	2.0	68.0
	\$60,000 - \$79,999	24	10.9	10.0	7.9	2.0	40.0
	\$80,000 - \$99,999	24	19.7	8.0	23.1	2.0	76.0
	\$100,000 - \$149,999	45	11.0	5.0	11.9	1.0	50.0
	\$150,000 - \$199,999	21	16.3	7.0	19.1	2.0	60.0
	\$200,000 or more	36	4.5	2.0	6.4	1.0	30.0
Urban/Rural	Rural Area	50	12.1	5.0	13.5	1.0	75.0
	Urbanized Area	185	12.7	8.0	14.6	1.0	76.0
Parent Highest Education	High School or less	39	18.4	12.0	16.8	1.0	76.0
	Some College	66	12.6	10.0	13.0	2.0	75.0
	College Grad	40	10.1	5.0	11.9	1.0	68.0
	Grad School	94	10.3	4.0	13.8	1.0	60.0
Parent Work Status	All parents working (FT/PT)*	175	12.0	5.0	15.1	1.0	76.0
	At least one parent not working**	63	14.6	12.0	12.3	1.0	75.0
	1 Parent, unemployed	34	19.8	16.0	17.3	2.0	75.0
	1 Parent, employed (FT/PT)	38	13.5	10.0	12.9	2.0	68.0
	2 Parents, 0 employed	15	11.6	12.0	6.1	1.0	20.0
	2 Parents, 1 employed	14	12.1	10.0	8.2	5.0	40.0
Age Group	0-4	25	15.7	11.0	16.4	1.0	75.0
	5-9	49	16.0	10.0	16.6	1.0	76.0
	10-12	160	11.3	7.0	13.1	1.0	68.0

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.23. Hours per Week Child Goes to another Preschool Program by Child

Q15I How many hours per week does this child go to another preschool program?		N	Mean	Median	SD	Min	Max
Total	Total	323	11.3	6.0	11.3	1.0	60.0
Parent Race/Ethnicity	Hispanic	22	11.5	10.0	9.0	1.0	30.0
	NH white	243	10.9	6.0	12.0	1.0	60.0
	NH Black	13	16.2	10.0	15.4	2.0	60.0
	NH API	30	11.7	8.0	9.8	1.0	40.0
	NH Other	10	12.3	10.0	6.7	2.0	24.0
Household Income	Less than \$20,000	9	12.8	10.0	9.7	3.0	30.0
	\$20,000 - \$39,999	19	10.6	5.0	9.5	2.0	30.0
	\$40,000 - \$59,999	45	11.6	6.0	10.7	1.0	45.0
	\$60,000 - \$79,999	41	10.6	8.0	9.2	1.0	48.0
	\$80,000 - \$99,999	35	14.1	10.0	14.2	2.0	58.0
	\$100,000 - \$149,999	73	13.9	10.0	12.7	1.0	60.0
	\$150,000 - \$199,999	44	10.4	5.0	11.6	1.0	60.0
	\$200,000 or more	48	5.3	2.0	6.5	1.0	33.0
Urban/Rural	Rural Area	83	12.1	10.0	10.6	1.0	51.0
	Urbanized Area	230	10.8	6.0	11.4	1.0	60.0
Parent Highest Education	High School or less	37	15.2	12.0	11.9	1.0	54.0
	Some College	60	11.0	6.0	11.1	1.0	45.0
	College Grad	90	11.9	10.0	8.7	1.0	42.0
	Grad School	136	9.3	4.0	12.5	1.0	60.0
Parent Work Status	All parents working (FT/PT)*	237	11.6	6.0	12.2	1.0	60.0
	At least one parent not working**	86	10.7	7.0	8.9	1.0	48.0
	1 Parent, unemployed	18	14.2	10.0	11.5	1.0	48.0
	1 Parent, employed (FT/PT)	37	12.5	10.0	10.5	2.0	45.0
	2 Parents, 0 employed	9	10.6	12.0	6.9	3.0	21.0
	2 Parents, 1 employed	59	10.1	6.0	8.6	1.0	40.0
Age Group	0-4	31	9.5	5.0	8.9	1.0	30.0
	5-9	89	11.9	7.0	11.3	2.0	60.0
	10-12	200	11.4	8.0	11.7	1.0	60.0

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.24. Hours per Week Child Goes to a Before or After-School Program by Child

Q15J How many hours per week does this child go to a before or after-school program?		N	Mean	Median	SD	Min	Max
Total	Total	506	8.4	6.0	8.1	1.0	48.0
Parent Race/Ethnicity	Hispanic	32	7.4	6.0	5.8	1.0	25.0
	NH white	376	8.4	5.0	8.6	1.0	48.0
	NH Black	28	12.5	10.0	10.5	1.0	40.0
	NH API	34	7.6	8.0	5.5	1.0	20.0
	NH Other	31	8.6	9.0	6.8	1.0	25.0
Household Income	Less than \$20,000	37	7.4	5.0	6.6	1.0	36.0
	\$20,000 - \$39,999	69	8.1	6.0	6.7	1.0	40.0
	\$40,000 - \$59,999	69	9.1	5.0	9.3	1.0	46.0
	\$60,000 - \$79,999	47	8.0	8.0	4.6	1.0	20.0
	\$80,000 - \$99,999	57	9.1	6.0	8.7	1.0	40.0
	\$100,000 - \$149,999	95	9.2	6.0	8.2	1.0	42.0
	\$150,000 - \$199,999	55	9.5	5.0	10.2	1.0	48.0
	\$200,000 or more	70	5.9	3.0	6.6	1.0	36.0
Urban/Rural	Rural Area	109	6.5	5.0	5.7	1.0	40.0
	Urbanized Area	378	8.8	6.0	8.5	1.0	48.0
Parent Highest Education	High School or less	74	9.0	6.0	8.7	1.0	40.0
	Some College	139	8.2	6.0	7.1	1.0	46.0
	College Grad	106	8.3	6.0	6.9	1.0	36.0
	Grad School	187	8.2	5.0	8.8	1.0	48.0
Parent Work Status	All parents working (FT/PT)*	391	8.7	6.0	8.6	1.0	48.0
	At least one parent not working**	115	7.4	6.0	5.9	1.0	40.0
	1 Parent, unemployed	50	7.4	5.0	6.9	1.0	40.0
	1 Parent, employed (FT/PT)	102	8.5	8.0	7.2	1.0	36.0
	2 Parents, 0 employed	21	7.2	5.0	5.2	1.0	25.0
	2 Parents, 1 employed	44	7.6	6.0	5.7	1.0	24.0
Age Group	0-4	21	6.6	3.0	7.0	1.0	25.0
	5-9	25	7.2	5.0	7.5	1.0	30.0
	10-12	452	8.7	6.0	8.2	1.0	48.0

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.25. Hours per Week Child Goes to Another Type of Program or Activity (e.g., Library, Sports/Athletic Program, or Club) by Child

Q15K How many hours per week does this child go to another type of program or activity, such as a library, sports/ athletic program or club?		N	Mean	Median	SD	Min	Max
Total	Total	642	6.5	4.0	6.9	1.0	40.0
Parent Race/Ethnicity	Hispanic	47	6.2	4.0	6.1	1.0	35.0
	NH white	457	6.6	4.0	7.0	1.0	40.0
	NH Black	33	9.5	8.0	8.1	1.0	40.0
	NH API	57	5.7	4.0	6.6	1.0	40.0
	NH Other	40	7.0	4.0	7.5	1.0	40.0
Household Income	Less than \$20,000	40	6.3	3.0	6.8	1.0	25.0
	\$20,000 - \$39,999	71	7.5	4.0	8.1	1.0	40.0
	\$40,000 - \$59,999	96	6.9	4.0	7.1	1.0	35.0
	\$60,000 - \$79,999	76	6.1	5.0	6.0	1.0	40.0
	\$80,000 - \$99,999	72	6.3	5.0	7.2	1.0	40.0
	\$100,000 - \$149,999	135	6.6	4.0	6.5	1.0	40.0
	\$150,000 - \$199,999	72	8.4	4.0	8.6	1.0	40.0
	\$200,000 or more	76	4.0	3.0	3.1	1.0	15.0
Urban/Rural	Rural Area	177	6.9	4.0	7.1	1.0	40.0
	Urbanized Area	439	6.2	4.0	6.7	1.0	40.0
Parent Highest Education	High School or less	102	6.6	4.0	7.1	1.0	35.0
	Some College	175	7.1	5.0	7.1	1.0	40.0
	College Grad	157	6.4	5.0	5.7	1.0	40.0
	Grad School	205	6.2	3.0	7.3	1.0	40.0
Parent Work Status	All parents working (FT/PT)*	434	6.5	4.0	7.1	1.0	40.0
	At least one parent not working**	202	6.6	4.0	6.4	1.0	40.0
	1 Parent, unemployed	68	10.0	5.0	9.7	1.0	40.0
	1 Parent, employed (FT/PT)	98	7.2	4.0	7.6	1.0	40.0
	2 Parents, 0 employed	27	6.5	4.0	5.4	1.0	20.0
	2 Parents, 1 employed	107	5.6	4.0	4.9	1.0	30.0
	2 Parents, 2 employed	336	6.4	4.0	7.0	1.0	40.0
Age Group	0-4	47	5.7	3.0	7.4	1.0	40.0
	5-9	66	7.1	5.0	6.9	1.0	40.0
	10-12	515	6.6	4.0	6.8	1.0	40.0

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.26. Amount Paid for Child Care per Week by Child

Q16 How much do you pay per week for child care for this child?		N	Mean	Median	SD	Min	Max
Total	Total	2408	\$147.66	\$20.00	\$264.11	\$0.00	\$1,550.00
Parent Race/Ethnicity	Hispanic	219	\$119.30	\$20.00	\$223.78	\$0.00	\$1,320.00
	NH white	1702	\$152.47	\$20.00	\$273.48	\$0.00	\$1,550.00
	NH Black	114	\$216.36	\$75.00	\$318.58	\$0.00	\$1,302.00
	NH API	210	\$144.96	\$17.00	\$254.90	\$0.00	\$1,500.00
	NH Other	130	\$135.96	\$30.00	\$229.54	\$0.00	\$1,446.00
Household Income	Less than \$20,000	229	\$89.93	\$0.00	\$195.34	\$0.00	\$1,200.00
	\$20,000 - \$39,999	399	\$100.53	\$0.00	\$215.77	\$0.00	\$1,500.00
	\$40,000 - \$59,999	394	\$129.70	\$0.00	\$254.00	\$0.00	\$1,500.00
	\$60,000 - \$79,999	315	\$108.48	\$0.00	\$212.91	\$0.00	\$1,500.00
	\$80,000 - \$99,999	313	\$124.49	\$10.00	\$243.88	\$0.00	\$1,505.00
	\$100,000 - \$149,999	422	\$191.57	\$55.00	\$288.94	\$0.00	\$1,550.00
	\$150,000 - \$199,999	157	\$241.11	\$100.00	\$317.93	\$0.00	\$1,500.00
	\$200,000 or more	127	\$361.59	\$270.00	\$371.74	\$0.00	\$1,515.00
Urban/Rural	Rural Area	819	\$106.00	\$0.00	\$221.30	\$0.00	\$1,500.00
	Urbanized Area	1524	\$163.98	\$30.00	\$275.14	\$0.00	\$1,550.00
Parent Highest Education	High School or less	565	\$107.01	\$0.00	\$230.21	\$0.00	\$1,302.00
	Some College	802	\$125.82	\$5.00	\$245.62	\$0.00	\$1,500.00
	College Grad	547	\$143.76	\$41.00	\$213.32	\$0.00	\$1,500.00
	Grad School	484	\$271.83	\$140.00	\$366.42	\$0.00	\$1,550.00
Parent Work Status	All parents working (FT/PT)*	1394	\$193.38	\$80.00	\$287.38	\$0.00	\$1,550.00
	At least one parent not working**	993	\$85.13	\$0.00	\$213.64	\$0.00	\$1,500.00
	1 Parent, unemployed	328	\$123.05	\$0.00	\$262.20	\$0.00	\$1,500.00
	1 Parent, employed (FT/PT)	396	\$186.81	\$75.00	\$272.37	\$0.00	\$1,430.00
	2 Parents, 0 employed	165	\$63.29	\$0.00	\$184.70	\$0.00	\$1,389.00
	2 Parents, 1 employed	500	\$78.36	\$0.00	\$200.46	\$0.00	\$1,270.00
Age Group	0-4	477	\$143.56	\$0.00	\$256.91	\$0.00	\$1,500.00
	5-9	368	\$204.68	\$71.00	\$313.65	\$0.00	\$1,500.00
	10-12	1523	\$134.61	\$20.00	\$252.38	\$0.00	\$1,550.00

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.27. Amount Paid for at Home with Parent, Step-Parent or Guardian Child Care per Week by Child

Q16A How much do you pay per week for “stay at home with parent, step-parent or guardian” child care for this child?		N	Mean	Median	SD	Min	Max
Total	Total	1894	\$33.10	\$0.00	\$85.59	\$0.00	\$500.00
Parent Race/Ethnicity	Hispanic	175	\$39.48	\$0.00	\$93.25	\$0.00	\$500.00
	NH white	1348	\$29.72	\$0.00	\$83.29	\$0.00	\$500.00
	NH Black	77	\$54.77	\$2.00	\$98.26	\$0.00	\$500.00
	NH API	165	\$35.31	\$0.00	\$84.73	\$0.00	\$500.00
	NH Other	103	\$27.99	\$0.00	\$66.13	\$0.00	\$400.00
Household Income	Less than \$20,000	185	\$37.18	\$0.00	\$78.66	\$0.00	\$400.00
	\$20,000 - \$39,999	319	\$28.19	\$0.00	\$82.59	\$0.00	\$500.00
	\$40,000 - \$59,999	316	\$33.12	\$0.00	\$87.12	\$0.00	\$500.00
	\$60,000 - \$79,999	255	\$31.33	\$0.00	\$77.46	\$0.00	\$500.00
	\$80,000 - \$99,999	243	\$20.91	\$0.00	\$67.94	\$0.00	\$500.00
	\$100,000 - \$149,999	330	\$29.04	\$0.00	\$75.95	\$0.00	\$500.00
	\$150,000 - \$199,999	115	\$49.93	\$2.00	\$109.85	\$0.00	\$500.00
	\$200,000 or more	89	\$82.37	\$20.00	\$135.23	\$0.00	\$500.00
Urban/Rural	Rural Area	651	\$22.01	\$0.00	\$76.37	\$0.00	\$500.00
	Urbanized Area	1193	\$38.20	\$0.00	\$89.41	\$0.00	\$500.00
Parent Highest Education	High School or less	452	\$28.21	\$0.00	\$75.80	\$0.00	\$500.00
	Some College	627	\$25.38	\$0.00	\$73.99	\$0.00	\$500.00
	College Grad	424	\$32.81	\$0.00	\$87.73	\$0.00	\$500.00
	Grad School	382	\$56.81	\$0.00	\$111.48	\$0.00	\$500.00
Parent Work Status	All parents working (FT/PT)*	1001	\$46.12	\$0.00	\$98.03	\$0.00	\$500.00
	At least one parent not working**	875	\$17.92	\$0.00	\$65.14	\$0.00	\$500.00
	1 Parent, unemployed	272	\$26.25	\$0.00	\$81.72	\$0.00	\$500.00
	1 Parent, employed (FT/PT)	262	\$52.85	\$0.00	\$111.54	\$0.00	\$500.00
	2 Parents, 0 employed	153	\$23.44	\$0.00	\$71.92	\$0.00	\$450.00
	2 Parents, 1 employed	450	\$13.22	\$0.00	\$55.23	\$0.00	\$500.00
	2 Parents, 2 employed	739	\$44.85	\$0.00	\$95.21	\$0.00	\$500.00
Age Group	0-4	402	\$40.25	\$0.00	\$98.10	\$0.00	\$500.00
	5-9	276	\$33.57	\$0.00	\$88.83	\$0.00	\$500.00
	10-12	1192	\$29.62	\$0.00	\$78.92	\$0.00	\$500.00

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.28. Amount Paid for Child Care with another Family Member per Week by Child

Q16B How much do you pay per week for “stay with another family member” child care for this child?							
		N	Mean	Median	SD	Min	Max
Total	Total	1086	\$34.53	\$0.00	\$75.44	\$0.00	\$500.00
Parent Race/Ethnicity	Hispanic	118	\$33.01	\$0.00	\$63.80	\$0.00	\$500.00
	NH white	737	\$33.22	\$0.00	\$75.89	\$0.00	\$500.00
	NH Black	44	\$58.18	\$2.00	\$126.69	\$0.00	\$500.00
	NH API	104	\$43.32	\$0.00	\$80.29	\$0.00	\$500.00
	NH Other	69	\$14.16	\$0.00	\$33.23	\$0.00	\$175.00
Household Income	Less than \$20,000	127	\$30.73	\$0.00	\$55.56	\$0.00	\$200.00
	\$20,000 - \$39,999	184	\$41.30	\$0.00	\$73.71	\$0.00	\$500.00
	\$40,000 - \$59,999	180	\$29.11	\$0.00	\$73.70	\$0.00	\$500.00
	\$60,000 - \$79,999	143	\$34.37	\$0.00	\$81.40	\$0.00	\$500.00
	\$80,000 - \$99,999	132	\$19.40	\$0.00	\$60.07	\$0.00	\$500.00
	\$100,000 - \$149,999	191	\$41.51	\$0.00	\$85.86	\$0.00	\$500.00
	\$150,000 - \$199,999	77	\$46.01	\$0.00	\$85.15	\$0.00	\$480.00
	\$200,000 or more	44	\$37.59	\$0.00	\$77.70	\$0.00	\$500.00
Urban/Rural	Rural Area	366	\$31.01	\$0.00	\$69.32	\$0.00	\$500.00
	Urbanized Area	690	\$36.37	\$0.00	\$78.61	\$0.00	\$500.00
Parent Highest Education	High School or less	281	\$33.66	\$0.00	\$67.12	\$0.00	\$500.00
	Some College	388	\$26.86	\$0.00	\$60.17	\$0.00	\$500.00
	College Grad	223	\$36.34	\$0.00	\$87.66	\$0.00	\$500.00
	Grad School	193	\$48.57	\$0.00	\$95.68	\$0.00	\$500.00
Parent Work Status	All parents working (FT/PT)*	695	\$42.22	\$0.00	\$84.32	\$0.00	\$500.00
	At least one parent not working**	384	\$20.67	\$0.00	\$53.03	\$0.00	\$500.00
	1 Parent, unemployed	162	\$25.96	\$0.00	\$58.36	\$0.00	\$500.00
	1 Parent, employed (FT/PT)	231	\$38.61	\$0.00	\$78.23	\$0.00	\$500.00
	2 Parents, 0 employed	52	\$33.36	\$0.00	\$62.90	\$0.00	\$299.00
	2 Parents, 1 employed	170	\$14.40	\$0.00	\$45.73	\$0.00	\$500.00
	2 Parents, 2 employed	464	\$43.27	\$0.00	\$86.00	\$0.00	\$500.00
Age Group	0-4	191	\$50.30	\$0.00	\$102.73	\$0.00	\$500.00
	5-9	157	\$35.84	\$0.00	\$62.19	\$0.00	\$500.00
	10-12	717	\$29.93	\$0.00	\$69.05	\$0.00	\$500.00

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.29. Amount Paid for Child Care with a Neighbor or Friend per Week by Child

Q16C How much do you pay per week for “stay with a neighbor or friend” child care for this child?		N	Mean	Median	SD	Min	Max
Total	Total	407	\$36.79	\$5.00	\$61.84	\$0.00	\$309.00
Parent Race/Ethnicity	Hispanic	37	\$47.60	\$20.00	\$67.38	\$0.00	\$200.00
	NH white	300	\$31.45	\$2.00	\$57.26	\$0.00	\$309.00
	NH Black	14	\$44.35	\$25.00	\$75.12	\$0.00	\$300.00
	NH API	19	\$45.42	\$0.00	\$60.70	\$0.00	\$250.00
	NH Other	33	\$48.46	\$10.00	\$75.29	\$0.00	\$225.00
Household Income	Less than \$20,000	34	\$36.10	\$0.00	\$63.76	\$0.00	\$200.00
	\$20,000 - \$39,999	83	\$34.39	\$20.00	\$54.43	\$0.00	\$250.00
	\$40,000 - \$59,999	72	\$38.70	\$10.00	\$67.03	\$0.00	\$309.00
	\$60,000 - \$79,999	51	\$29.39	\$0.00	\$43.75	\$0.00	\$200.00
	\$80,000 - \$99,999	38	\$51.49	\$26.00	\$66.21	\$0.00	\$225.00
	\$100,000 - \$149,999	68	\$26.16	\$0.00	\$55.97	\$0.00	\$300.00
	\$150,000 - \$199,999	33	\$54.43	\$12.00	\$84.13	\$0.00	\$300.00
	\$200,000 or more	24	\$52.15	\$12.00	\$68.52	\$0.00	\$200.00
Urban/Rural	Rural Area	146	\$29.12	\$2.00	\$52.25	\$0.00	\$309.00
	Urbanized Area	248	\$41.25	\$10.00	\$65.55	\$0.00	\$300.00
Parent Highest Education	High School or less	89	\$34.29	\$10.00	\$54.70	\$0.00	\$250.00
	Some College	143	\$32.52	\$3.00	\$58.44	\$0.00	\$309.00
	College Grad	71	\$39.59	\$2.00	\$65.26	\$0.00	\$270.00
	Grad School	102	\$43.34	\$10.00	\$70.35	\$0.00	\$300.00
Parent Work Status	All parents working (FT/PT)*	271	\$44.03	\$10.00	\$68.28	\$0.00	\$300.00
	At least one parent not working**	133	\$23.85	\$0.00	\$44.97	\$0.00	\$309.00
	1 Parent, unemployed	67	\$31.91	\$2.00	\$56.96	\$0.00	\$220.00
	1 Parent, employed (FT/PT)	99	\$49.02	\$20.00	\$65.04	\$0.00	\$300.00
	2 Parents, 0 employed	23	\$26.69	\$0.00	\$52.08	\$0.00	\$309.00
	2 Parents, 1 employed	43	\$16.12	\$0.00	\$24.79	\$0.00	\$100.00
Age Group	0-4	68	\$42.71	\$20.00	\$60.59	\$0.00	\$225.00
	5-9	52	\$58.59	\$25.00	\$78.36	\$0.00	\$300.00
	10-12	277	\$31.84	\$2.00	\$59.06	\$0.00	\$309.00

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.30. Amount Paid for Child Care with a Nanny or Au-Pair per Week by Child

Q16D How much do you pay per week for “stay with nanny or au-pair” child care for this child?		N	Mean	Median	SD	Min	Max
Total	Total	227	\$143.78	\$100.00	\$169.12	\$0.00	\$700.00
Parent Race/Ethnicity	Hispanic	12	\$128.36	\$40.00	\$176.82	\$9.00	\$600.00
	NH white	179	\$149.43	\$100.00	\$175.61	\$0.00	\$700.00
	NH Black	15	\$136.71	\$55.00	\$182.24	\$0.00	\$700.00
	NH API	13	\$154.66	\$195.00	\$102.30	\$0.00	\$400.00
	NH Other	5	\$12.89	\$0.00	\$16.90	\$0.00	\$50.00
Household Income	Less than \$20,000	3	\$134.04	\$0.00	\$215.34	\$0.00	\$480.00
	\$20,000 - \$39,999	20	\$60.11	\$22.00	\$83.75	\$0.00	\$350.00
	\$40,000 - \$59,999	21	\$144.30	\$200.00	\$89.00	\$2.00	\$300.00
	\$60,000 - \$79,999	25	\$86.43	\$50.00	\$92.60	\$0.00	\$300.00
	\$80,000 - \$99,999	33	\$147.57	\$100.00	\$160.93	\$0.00	\$700.00
	\$100,000 - \$149,999	47	\$171.11	\$100.00	\$183.70	\$0.00	\$700.00
	\$150,000 - \$199,999	41	\$180.49	\$100.00	\$200.73	\$2.00	\$700.00
	\$200,000 or more	32	\$135.70	\$35.00	\$201.87	\$10.00	\$700.00
Urban/Rural	Rural Area	42	\$109.00	\$55.00	\$126.30	\$0.00	\$500.00
	Urbanized Area	179	\$145.64	\$100.00	\$170.13	\$0.00	\$700.00
Parent Highest Education	High School or less	21	\$66.87	\$40.00	\$67.36	\$0.00	\$200.00
	Some College	41	\$102.00	\$50.00	\$132.11	\$0.00	\$500.00
	College Grad	64	\$160.76	\$100.00	\$140.33	\$0.00	\$700.00
	Grad School	101	\$177.61	\$90.00	\$209.26	\$0.00	\$700.00
Parent Work Status	All parents working (FT/PT)*	189	\$147.25	\$80.00	\$176.36	\$0.00	\$700.00
	At least one parent not working**	34	\$126.78	\$100.00	\$125.78	\$0.00	\$600.00
	1 Parent, unemployed	14	\$95.32	\$100.00	\$128.45	\$0.00	\$500.00
	1 Parent, employed (FT/PT)	36	\$122.00	\$100.00	\$136.93	\$0.00	\$700.00
	2 Parents, 0 employed	1	\$200.00	\$200.00	\$0.00	\$200.00	\$200.00
	2 Parents, 1 employed	19	\$132.31	\$100.00	\$127.16	\$0.00	\$600.00
Age Group	0-4	51	\$148.49	\$100.00	\$182.66	\$0.00	\$700.00
	5-9	41	\$144.71	\$100.00	\$157.45	\$0.00	\$700.00
	10-12	131	\$143.56	\$80.00	\$168.77	\$0.00	\$700.00

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.31. Amount Paid for Stay at Home Alone Child Care per Week by Child

Q16E How much do you pay per week for “stay at home alone” child care for this child?							
		N	Mean	Median	SD	Min	Max
Total	Total	313	\$32.94	\$0.00	\$80.06	\$0.00	\$500.00
Parent Race/Ethnicity	Hispanic	26	\$33.67	\$0.00	\$85.25	\$0.00	\$344.00
	NH white	239	\$32.62	\$0.00	\$78.75	\$0.00	\$500.00
	NH Black	15	\$26.78	\$6.00	\$49.62	\$0.00	\$200.00
	NH API	17	\$36.89	\$0.00	\$87.83	\$0.00	\$300.00
	NH Other	11	\$56.61	\$0.00	\$116.81	\$0.00	\$346.00
Household Income	Less than \$20,000	30	\$5.92	\$0.00	\$17.60	\$0.00	\$100.00
	\$20,000 - \$39,999	36	\$32.47	\$0.00	\$101.75	\$0.00	\$500.00
	\$40,000 - \$59,999	42	\$67.14	\$0.00	\$112.21	\$0.00	\$344.00
	\$60,000 - \$79,999	40	\$28.53	\$0.00	\$77.97	\$0.00	\$300.00
	\$80,000 - \$99,999	44	\$0.89	\$0.00	\$2.51	\$0.00	\$10.00
	\$100,000 - \$149,999	61	\$36.87	\$0.00	\$91.75	\$0.00	\$500.00
	\$150,000 - \$199,999	28	\$35.58	\$10.00	\$43.80	\$0.00	\$150.00
	\$200,000 or more	30	\$39.25	\$20.00	\$45.72	\$0.00	\$200.00
Urban/Rural	Rural Area	86	\$34.34	\$0.00	\$87.94	\$0.00	\$500.00
	Urbanized Area	215	\$33.89	\$0.00	\$78.68	\$0.00	\$500.00
Parent Highest Education	High School or less	64	\$30.47	\$0.00	\$86.05	\$0.00	\$344.00
	Some College	98	\$24.66	\$0.00	\$65.65	\$0.00	\$400.00
	College Grad	56	\$25.60	\$0.00	\$88.44	\$0.00	\$500.00
	Grad School	95	\$49.23	\$10.00	\$78.51	\$0.00	\$500.00
Parent Work Status	All parents working (FT/PT)*	230	\$40.77	\$0.00	\$88.98	\$0.00	\$500.00
	At least one parent not working**	81	\$11.71	\$0.00	\$41.74	\$0.00	\$346.00
	1 Parent, unemployed	33	\$22.27	\$0.00	\$70.51	\$0.00	\$346.00
	1 Parent, employed (FT/PT)	57	\$3.94	\$0.00	\$12.44	\$0.00	\$80.00
	2 Parents, 0 employed	12	\$6.05	\$0.00	\$12.05	\$0.00	\$40.00
	2 Parents, 1 employed	36	\$8.27	\$0.00	\$23.64	\$0.00	\$100.00
	2 Parents, 2 employed	173	\$47.80	\$0.00	\$95.35	\$0.00	\$500.00
Age Group	0-4	22	\$106.90	\$20.00	\$146.30	\$0.00	\$500.00
	5-9	9	\$54.82	\$20.00	\$73.32	\$0.00	\$234.00
	10-12	264	\$25.24	\$0.00	\$67.69	\$0.00	\$500.00

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.32. Amount Paid for Child Care at a Licensed Family Child Care Home per Week by Child

Q16F How much do you pay per week for “licensed family child care home” child care for this child?		N	Mean	Median	SD	Min	Max
Total	Total	255	\$136.16	\$80.00	\$164.24	\$0.00	\$1,200.00
Parent Race/Ethnicity	Hispanic	14	\$137.56	\$100.00	\$148.75	\$1.00	\$500.00
	NH white	199	\$130.35	\$55.00	\$169.10	\$0.00	\$1,200.00
	NH Black	10	\$110.69	\$10.00	\$202.24	\$0.00	\$600.00
	NH API	19	\$174.47	\$122.00	\$148.46	\$0.00	\$600.00
	NH Other	10	\$102.99	\$100.00	\$62.06	\$0.00	\$200.00
Household Income	Less than \$20,000	17	\$84.15	\$25.00	\$132.33	\$0.00	\$600.00
	\$20,000 - \$39,999	28	\$172.38	\$150.00	\$145.92	\$0.00	\$400.00
	\$40,000 - \$59,999	26	\$107.26	\$80.00	\$133.01	\$0.00	\$650.00
	\$60,000 - \$79,999	24	\$184.48	\$80.00	\$256.09	\$0.00	\$1,200.00
	\$80,000 - \$99,999	23	\$145.88	\$100.00	\$123.56	\$0.00	\$400.00
	\$100,000 - \$149,999	54	\$127.61	\$100.00	\$127.38	\$2.00	\$432.00
	\$150,000 - \$199,999	40	\$132.06	\$45.00	\$174.39	\$0.00	\$750.00
	\$200,000 or more	43	\$119.16	\$40.00	\$169.56	\$3.00	\$1,000.00
Urban/Rural	Rural Area	58	\$147.28	\$100.00	\$167.57	\$0.00	\$1,000.00
	Urbanized Area	192	\$134.75	\$75.00	\$164.06	\$0.00	\$1,200.00
Parent Highest Education	High School or less	22	\$149.06	\$100.00	\$142.90	\$0.00	\$400.00
	Some College	69	\$152.66	\$100.00	\$195.77	\$0.00	\$1,200.00
	College Grad	45	\$167.23	\$100.00	\$156.23	\$1.00	\$650.00
	Grad School	119	\$108.25	\$45.00	\$145.54	\$0.00	\$1,000.00
Parent Work Status	All parents working (FT/PT)*	213	\$135.10	\$80.00	\$160.82	\$0.00	\$1,200.00
	At least one parent not working**	40	\$142.14	\$90.00	\$182.65	\$0.00	\$1,000.00
	1 Parent, unemployed	22	\$122.75	\$100.00	\$141.83	\$0.00	\$500.00
	1 Parent, employed (FT/PT)	35	\$159.23	\$100.00	\$158.69	\$0.00	\$650.00
	2 Parents, 0 employed	5	\$81.18	\$50.00	\$107.95	\$0.00	\$300.00
	2 Parents, 1 employed	13	\$186.04	\$123.00	\$224.10	\$15.00	\$1,000.00
Age Group	0-4	43	\$130.37	\$70.00	\$141.36	\$0.00	\$400.00
	5-9	39	\$184.27	\$123.00	\$209.30	\$0.00	\$1,200.00
	10-12	169	\$126.01	\$75.00	\$155.11	\$0.00	\$1,200.00

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.33. Amount Paid for Child Care at a Licensed Child Care Center per Week by Child

Q16G How much do you pay per week for “licensed child care center” child care for this child?		N	Mean	Median	SD	Min	Max
Total	Total	472	\$214.80	\$100.00	\$318.76	\$0.00	\$1,700.00
Parent Race/Ethnicity	Hispanic	34	\$164.29	\$140.00	\$161.75	\$0.00	\$700.00
	NH white	340	\$171.83	\$100.00	\$215.36	\$0.00	\$1,230.00
	NH Black	33	\$263.69	\$60.00	\$376.00	\$0.00	\$1,300.00
	NH API	32	\$476.91	\$200.00	\$622.63	\$0.00	\$1,700.00
	NH Other	29	\$206.52	\$100.00	\$293.68	\$0.00	\$1,600.00
Household Income	Less than \$20,000	35	\$139.62	\$50.00	\$249.72	\$0.00	\$1,200.00
	\$20,000 - \$39,999	77	\$179.47	\$75.00	\$259.86	\$0.00	\$1,600.00
	\$40,000 - \$59,999	60	\$177.58	\$122.00	\$189.57	\$0.00	\$800.00
	\$60,000 - \$79,999	52	\$179.22	\$147.00	\$227.43	\$0.00	\$1,200.00
	\$80,000 - \$99,999	43	\$204.93	\$75.00	\$324.26	\$0.00	\$1,300.00
	\$100,000 - \$149,999	84	\$223.59	\$200.00	\$245.72	\$0.00	\$1,230.00
	\$150,000 - \$199,999	58	\$116.34	\$75.00	\$124.76	\$0.00	\$600.00
	\$200,000 or more	60	\$396.59	\$100.00	\$564.15	\$0.00	\$1,700.00
Urban/Rural	Rural Area	103	\$193.67	\$120.00	\$244.35	\$0.00	\$1,600.00
	Urbanized Area	355	\$217.59	\$100.00	\$334.29	\$0.00	\$1,700.00
Parent Highest Education	High School or less	67	\$178.56	\$100.00	\$270.39	\$0.00	\$1,300.00
	Some College	147	\$189.92	\$99.00	\$256.14	\$0.00	\$1,600.00
	College Grad	94	\$344.23	\$200.00	\$464.02	\$0.00	\$1,700.00
	Grad School	164	\$161.95	\$80.00	\$219.97	\$0.00	\$1,500.00
Parent Work Status	All parents working (FT/PT)*	376	\$224.56	\$100.00	\$331.66	\$0.00	\$1,700.00
	At least one parent not working**	96	\$177.54	\$65.00	\$260.43	\$0.00	\$1,200.00
	1 Parent, unemployed	47	\$170.11	\$50.00	\$232.64	\$0.00	\$1,200.00
	1 Parent, employed (FT/PT)	104	\$197.06	\$100.00	\$261.90	\$0.00	\$1,600.00
	2 Parents, 0 employed	12	\$116.43	\$100.00	\$159.22	\$0.00	\$750.00
	2 Parents, 1 employed	37	\$198.65	\$120.00	\$294.28	\$0.00	\$1,200.00
Age Group	0-4	108	\$199.99	\$150.00	\$240.22	\$0.00	\$1,600.00
	5-9	100	\$330.33	\$200.00	\$424.78	\$0.00	\$1,700.00
	10-12	258	\$166.02	\$80.00	\$274.86	\$0.00	\$1,700.00

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.34. Amount Paid for Child Care at a Head Start or ECEAP Program per Week by Child

Q16H How much do you pay per week for “Head Start or ECEAP program” child care for this child?		N	Mean	Median	SD	Min	Max
Total	Total	243	\$77.22	\$20.00	\$155.28	\$0.00	\$1,000.00
Parent Race/Ethnicity	Hispanic	16	\$65.60	\$11.00	\$99.50	\$0.00	\$400.00
	NH white	175	\$80.83	\$25.00	\$168.79	\$0.00	\$1,000.00
	NH Black	12	\$79.74	\$5.00	\$158.87	\$0.00	\$500.00
	NH API	17	\$101.29	\$50.00	\$160.29	\$0.00	\$800.00
	NH Other	23	\$38.24	\$0.00	\$75.20	\$0.00	\$300.00
Household Income	Less than \$20,000	26	\$39.17	\$0.00	\$95.36	\$0.00	\$500.00
	\$20,000 - \$39,999	35	\$28.46	\$0.00	\$65.43	\$0.00	\$260.00
	\$40,000 - \$59,999	30	\$55.50	\$3.00	\$89.92	\$0.00	\$450.00
	\$60,000 - \$79,999	26	\$84.95	\$15.00	\$126.78	\$0.00	\$400.00
	\$80,000 - \$99,999	24	\$33.14	\$0.00	\$71.50	\$0.00	\$350.00
	\$100,000 - \$149,999	43	\$154.27	\$55.00	\$256.93	\$0.00	\$1,000.00
	\$150,000 - \$199,999	22	\$137.48	\$98.00	\$178.72	\$0.00	\$800.00
	\$200,000 or more	37	\$48.54	\$30.00	\$80.22	\$0.00	\$540.00
Urban/Rural	Rural Area	54	\$96.39	\$0.00	\$258.02	\$0.00	\$1,000.00
	Urbanized Area	185	\$73.13	\$30.00	\$117.04	\$0.00	\$800.00
Parent Highest Education	High School or less	39	\$26.23	\$0.00	\$76.53	\$0.00	\$500.00
	Some College	67	\$48.29	\$4.00	\$67.18	\$0.00	\$225.00
	College Grad	41	\$73.47	\$30.00	\$120.13	\$0.00	\$500.00
	Grad School	96	\$130.50	\$40.00	\$220.30	\$0.00	\$1,000.00
Parent Work Status	All parents working (FT/PT)*	176	\$91.79	\$36.00	\$170.92	\$0.00	\$1,000.00
	At least one parent not working**	66	\$41.21	\$0.00	\$97.68	\$0.00	\$500.00
	1 Parent, unemployed	35	\$73.88	\$0.00	\$144.55	\$0.00	\$500.00
	1 Parent, employed (FT/PT)	41	\$40.13	\$0.00	\$86.13	\$0.00	\$450.00
	2 Parents, 0 employed	14	\$17.96	\$0.00	\$48.22	\$0.00	\$190.00
	2 Parents, 1 employed	17	\$31.98	\$0.00	\$62.50	\$0.00	\$200.00
Age Group	0-4	26	\$47.67	\$3.00	\$89.19	\$0.00	\$500.00
	5-9	48	\$46.03	\$0.00	\$126.35	\$0.00	\$800.00
	10-12	164	\$92.03	\$36.00	\$170.14	\$0.00	\$1,000.00

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.35. Amount Paid for Child Care at another Preschool Program per Week by Child

Q16I How much do you pay per week for “another preschool program” child care for this child?		N	Mean	Median	SD	Min	Max
Total	Total	333	\$119.66	\$50.00	\$195.23	\$0.00	\$1,100.00
Parent Race/Ethnicity	Hispanic	22	\$139.62	\$50.00	\$211.48	\$0.00	\$766.00
	NH white	249	\$107.84	\$50.00	\$182.89	\$0.00	\$1,100.00
	NH Black	18	\$112.88	\$40.00	\$142.67	\$0.00	\$500.00
	NH API	29	\$173.00	\$100.00	\$252.59	\$0.00	\$1,100.00
	NH Other	10	\$52.51	\$50.00	\$52.37	\$0.00	\$200.00
Household Income	Less than \$20,000	12	\$96.70	\$0.00	\$260.37	\$0.00	\$900.00
	\$20,000 - \$39,999	23	\$56.50	\$5.00	\$120.28	\$0.00	\$500.00
	\$40,000 - \$59,999	49	\$129.13	\$50.00	\$190.68	\$0.00	\$766.00
	\$60,000 - \$79,999	39	\$102.12	\$40.00	\$143.41	\$0.00	\$500.00
	\$80,000 - \$99,999	36	\$108.80	\$63.00	\$114.89	\$0.00	\$512.00
	\$100,000 - \$149,999	73	\$183.63	\$100.00	\$272.42	\$0.00	\$1,100.00
	\$150,000 - \$199,999	44	\$92.82	\$46.00	\$138.57	\$0.00	\$600.00
	\$200,000 or more	51	\$79.81	\$35.00	\$138.60	\$0.00	\$1,000.00
Urban/Rural	Rural Area	87	\$149.24	\$60.00	\$276.98	\$0.00	\$1,100.00
	Urbanized Area	238	\$106.48	\$50.00	\$158.74	\$0.00	\$1,000.00
Parent Highest Education	High School or less	40	\$114.21	\$7.00	\$227.11	\$0.00	\$900.00
	Some College	63	\$127.54	\$50.00	\$212.76	\$0.00	\$1,100.00
	College Grad	95	\$102.33	\$60.00	\$146.46	\$0.00	\$1,100.00
	Grad School	135	\$132.46	\$50.00	\$204.04	\$0.00	\$1,000.00
Parent Work Status	All parents working (FT/PT)*	243	\$124.26	\$50.00	\$192.72	\$0.00	\$1,100.00
	At least one parent not working**	89	\$110.22	\$50.00	\$201.26	\$0.00	\$1,100.00
	1 Parent, unemployed	21	\$46.14	\$15.00	\$87.50	\$0.00	\$400.00
	1 Parent, employed (FT/PT)	40	\$72.36	\$0.00	\$120.26	\$0.00	\$500.00
	2 Parents, 0 employed	9	\$17.31	\$0.00	\$27.47	\$0.00	\$100.00
	2 Parents, 1 employed	59	\$140.47	\$55.00	\$226.07	\$0.00	\$1,100.00
Age Group	0-4	33	\$102.51	\$30.00	\$141.75	\$0.00	\$500.00
	5-9	90	\$122.35	\$50.00	\$192.14	\$0.00	\$1,100.00
	10-12	207	\$117.60	\$50.00	\$196.62	\$0.00	\$1,100.00

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.36. Amount Paid for Child Care at a Before or After-School Program per Week by Child

Q16J How much do you pay per week for “before or after-school program” child care for this child?							
		N	Mean	Median	SD	Min	Max
Total	Total	502	\$68.37	\$25.00	\$105.08	\$0.00	\$700.00
Parent Race/Ethnicity	Hispanic	32	\$22.47	\$0.00	\$41.04	\$0.00	\$200.00
	NH white	371	\$71.50	\$30.00	\$105.72	\$0.00	\$700.00
	NH Black	31	\$63.52	\$8.00	\$103.61	\$0.00	\$500.00
	NH API	33	\$99.13	\$20.00	\$134.56	\$0.00	\$425.00
	NH Other	30	\$75.91	\$50.00	\$96.93	\$0.00	\$500.00
Household Income	Less than \$20,000	37	\$36.29	\$0.00	\$78.11	\$0.00	\$300.00
	\$20,000 - \$39,999	69	\$30.14	\$0.00	\$66.66	\$0.00	\$500.00
	\$40,000 - \$59,999	73	\$34.07	\$0.00	\$62.64	\$0.00	\$350.00
	\$60,000 - \$79,999	45	\$60.40	\$20.00	\$99.20	\$0.00	\$400.00
	\$80,000 - \$99,999	56	\$70.17	\$50.00	\$102.25	\$0.00	\$650.00
	\$100,000 - \$149,999	93	\$100.11	\$50.00	\$117.65	\$0.00	\$700.00
	\$150,000 - \$199,999	58	\$83.37	\$30.00	\$129.68	\$0.00	\$600.00
	\$200,000 or more	66	\$109.89	\$45.00	\$122.75	\$0.00	\$400.00
Urban/Rural	Rural Area	110	\$35.66	\$0.00	\$79.07	\$0.00	\$531.00
	Urbanized Area	377	\$76.45	\$30.00	\$109.04	\$0.00	\$700.00
Parent Highest Education	High School or less	75	\$37.15	\$0.00	\$75.18	\$0.00	\$650.00
	Some College	142	\$38.32	\$0.00	\$67.92	\$0.00	\$500.00
	College Grad	106	\$63.03	\$26.00	\$88.23	\$0.00	\$425.00
	Grad School	179	\$112.76	\$50.00	\$133.56	\$0.00	\$700.00
Parent Work Status	All parents working (FT/PT)*	388	\$79.95	\$30.00	\$112.79	\$0.00	\$700.00
	At least one parent not working**	113	\$30.15	\$0.00	\$59.73	\$0.00	\$300.00
	1 Parent, unemployed	47	\$49.36	\$3.00	\$77.44	\$0.00	\$300.00
	1 Parent, employed (FT/PT)	102	\$61.25	\$1.00	\$103.41	\$0.00	\$650.00
	2 Parents, 0 employed	21	\$12.65	\$0.00	\$25.02	\$0.00	\$100.00
	2 Parents, 1 employed	45	\$30.97	\$0.00	\$61.10	\$0.00	\$250.00
Age Group	0-4	24	\$57.66	\$20.00	\$78.73	\$0.00	\$250.00
	5-9	25	\$85.10	\$30.00	\$120.02	\$0.00	\$531.00
	10-12	444	\$67.63	\$25.00	\$105.43	\$0.00	\$700.00

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.37. Amount Paid for Child Care at Another Type of Program or Activity (e.g., Library, Sports/Athletic Program, or Club) Per Week by Child

Q16K How much do you pay per week for “another type of program or activity, such as a library, sports/athletic program or club” child care for this child?		N	Mean	Median	SD	Min	Max
Total	Total	650	\$58.11	\$20.00	\$93.03	\$0.00	\$500.00
Parent Race/Ethnicity	Hispanic	46	\$28.08	\$0.00	\$44.26	\$0.00	\$200.00
	NH white	464	\$61.94	\$25.00	\$93.05	\$0.00	\$500.00
	NH Black	34	\$45.69	\$15.00	\$57.44	\$0.00	\$200.00
	NH API	57	\$85.76	\$20.00	\$130.34	\$0.00	\$500.00
	NH Other	41	\$56.62	\$3.00	\$96.09	\$0.00	\$500.00
Household Income	Less than \$20,000	43	\$28.56	\$0.00	\$53.75	\$0.00	\$185.00
	\$20,000 - \$39,999	74	\$34.84	\$0.00	\$79.99	\$0.00	\$342.00
	\$40,000 - \$59,999	104	\$27.39	\$1.00	\$57.63	\$0.00	\$455.00
	\$60,000 - \$79,999	73	\$48.48	\$15.00	\$73.55	\$0.00	\$350.00
	\$80,000 - \$99,999	72	\$37.82	\$15.00	\$61.81	\$0.00	\$500.00
	\$100,000 - \$149,999	134	\$84.74	\$50.00	\$100.60	\$0.00	\$500.00
	\$150,000 - \$199,999	73	\$85.82	\$50.00	\$106.25	\$0.00	\$400.00
	\$200,000 or more	73	\$90.88	\$35.00	\$135.40	\$0.00	\$500.00
Urban/Rural	Rural Area	187	\$33.35	\$10.00	\$56.15	\$0.00	\$383.00
	Urbanized Area	441	\$66.82	\$25.00	\$100.77	\$0.00	\$500.00
Parent Highest Education	High School or less	103	\$39.28	\$0.00	\$72.60	\$0.00	\$300.00
	Some College	185	\$33.27	\$10.00	\$61.02	\$0.00	\$455.00
	College Grad	152	\$61.72	\$20.00	\$91.96	\$0.00	\$500.00
	Grad School	206	\$94.02	\$50.00	\$118.28	\$0.00	\$500.00
Parent Work Status	All parents working (FT/PT)*	433	\$68.29	\$30.00	\$97.13	\$0.00	\$500.00
	At least one parent not working**	211	\$39.06	\$0.00	\$81.71	\$0.00	\$500.00
	1 Parent, unemployed	72	\$55.70	\$0.00	\$105.65	\$0.00	\$500.00
	1 Parent, employed (FT/PT)	96	\$43.24	\$9.00	\$70.48	\$0.00	\$350.00
	2 Parents, 0 employed	25	\$45.87	\$15.00	\$79.64	\$0.00	\$275.00
	2 Parents, 1 employed	114	\$32.46	\$0.00	\$72.81	\$0.00	\$500.00
Age Group	0-4	53	\$53.25	\$2.00	\$104.31	\$0.00	\$500.00
	5-9	68	\$65.24	\$20.00	\$84.72	\$0.00	\$300.00
	10-12	513	\$57.73	\$20.00	\$93.03	\$0.00	\$500.00

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.38. Summer Child Care Arrangements by Child

Q17 Did you use a different child care arrangement for this child last summer? If yes, which of the following child care arrangements did you use?														
	N	Stay at home with parent, step-parent or guardian	Stay with another family member	Stay with a neighbor or friend	Stay with nanny or au-pair	Stay at home alone	Go to licensed family child care home	Go to licensed child care center	Go to a Head Start or ECEAP program	Go to another preschool program	Go to a before or after-school program	Go to another type of program or activity, such as a library, sports/athletic program or club	Go to full-day school age or day camp	
Total	Total	332	70.9	47.2	23.5	17.8	15.4	17.5	29.3	14.5	20.0	22.3	30.8	41.7
Parent Race/Ethnicity	Hispanic	18	54.0	58.0	33.6	20.2	13.0	9.4	19.0	4.0	19.0	16.3	11.4	17.7
	NH white	229	75.7	48.6	23.9	19.9	17.1	21.3	34.8	19.5	23.5	26.0	33.3	47.2
	NH Black	24	77.5	55.6	31.8	22.0	29.1	23.8	31.0	16.9	10.9	21.3	23.1	18.7
	NH API	35	60.9	25.9	10.8	13.4	7.8	13.5	19.9	7.8	13.6	20.4	46.8	47.7
	NH Other	23	75.5	58.5	22.0	0.0	5.6	0.0	22.0	4.2	16.6	8.5	20.8	50.7
Household Income	Less than \$20,000	27	82.3	58.1	13.3	1.9	15.0	8.4	16.0	0.0	0.0	0.0	3.1	13.0
	\$20,000 - \$39,999	42	65.0	37.9	32.2	19.7	18.4	21.5	22.8	7.9	11.6	22.7	33.1	35.1
	\$40,000 - \$59,999	39	66.1	56.1	17.6	25.2	21.1	8.5	39.3	7.3	40.5	22.3	31.1	51.3
	\$60,000 - \$79,999	28	73.1	51.1	20.1	5.7	2.6	16.5	29.5	7.8	13.0	22.8	15.9	31.5
	\$80,000 - \$99,999	60	74.2	50.6	19.4	17.8	13.1	11.6	17.1	8.1	11.6	14.3	22.8	40.0
	\$100,000 - \$149,999	73	69.5	41.6	19.8	14.0	13.2	18.6	29.0	24.1	23.4	29.9	46.5	54.4
	\$150,000 - \$199,999	26	68.5	62.5	34.6	38.0	12.2	30.1	55.6	26.1	27.1	33.9	37.2	33.6
	\$200,000 or more	29	74.6	35.9	42.1	22.3	30.6	34.7	47.8	35.1	36.7	36.1	43.0	55.0
Urban/Rural	Rural Area	87	71.6	53.3	21.8	13.2	13.4	9.8	22.8	14.0	13.9	15.0	23.8	36.3
	Urbanized Area	235	71.0	43.1	25.0	19.9	16.9	20.5	32.5	14.9	20.8	23.1	32.0	42.3
Parent Highest Education	High School or less	54	75.6	61.9	18.6	15.4	15.5	15.9	27.3	8.5	17.1	27.5	31.3	35.3
	Some College	96	60.6	38.1	24.5	13.1	15.9	14.4	23.9	7.7	15.9	12.9	17.4	33.2
	College Grad	76	78.1	48.7	17.4	18.6	7.4	5.9	16.7	8.8	9.9	13.5	23.2	37.8
	Grad School	105	69.5	40.5	33.2	24.1	22.4	32.7	47.6	31.7	35.6	34.4	49.7	59.4
Parent Work Status	All parents working (FT/PT)*	247	69.3	45.0	25.7	21.7	17.9	21.4	31.7	16.5	24.8	24.7	33.8	48.4

Q17 Did you use a different child care arrangement for this child last summer? If yes, which of the following child care arrangements did you use?													
	N	Stay at home with parent, step-parent or guardian	Stay with another family member	Stay with a neighbor or friend	Stay with nanny or au-pair	Stay at home alone	Go to licensed family child care home	Go to licensed child care center	Go to a Head Start or ECEAP program	Go to another preschool program	Go to a before or after-school program	Go to another type of program or activity, such as a library, sports/athletic program or club	Go to full-day school age or day camp
At least one parent not working**	84	78.7	50.7	18.6	7.8	9.2	7.6	23.9	9.7	7.1	17.0	23.8	24.7
1 Parent, unemployed	31	54.2	45.9	29.9	11.3	11.7	1.3	23.1	2.2	8.2	7.3	24.0	26.0
1 Parent, employed (FT/PT)	59	64.4	43.2	16.7	10.8	6.6	9.5	21.2	8.4	4.1	14.6	21.1	34.0
2 Parents, 0 employed	15	100.0	41.2	27.8	5.9	21.4	14.5	20.5	10.8	13.0	21.9	21.9	24.5
2 Parents, 1 employed	38	79.5	57.9	8.5	7.2	1.7	7.1	25.9	12.6	3.6	19.1	24.8	24.3
2 Parents, 2 employed	188	70.0	45.3	27.0	23.3	19.7	23.2	33.3	17.7	27.9	26.2	35.8	50.6
Age Group													
0-4	44	78.0	59.2	21.4	35.1	22.3	15.2	42.4	17.6	19.4	16.1	27.6	31.1
5-9	48	79.1	55.1	22.7	12.6	13.4	13.8	32.1	16.8	21.4	25.5	31.1	20.1
10-12	231	68.0	41.3	22.4	14.7	13.1	18.7	24.9	12.6	20.4	22.8	31.3	49.1

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.39. Time Off Taken Due to Child Care Issues

Q19 In the past 12 months, have you or your spouse or partner had to take time off due to child care issues?				
		N	Yes	No
All	Total	1504	45.6	54.4
Race/Ethnicity	Hispanic	134	42.8	57.2
	NH white	1033	44.9	55.1
	NH Black	70	47.2	52.8
	NH API	161	50.9	49.1
	NH Other	84	47.2	52.8
Household Income*	Less than \$20,000	160	30.7	69.3
	\$20,000 - \$39,999	233	50.6	49.4
	\$40,000 - \$59,999	239	39.3	60.7
	\$60,000 - \$79,999	206	39.4	60.6
	\$80,000 - \$99,999	183	48.9	51.1
	\$100,000 - \$149,999	253	51.7	48.3
	\$150,000 - \$199,999	106	62.5	37.5
	\$200,000 or more	86	51.0	49.0
Urban/Rural	Rural Area	497	42.1	57.9
	Urbanized Area	960	47.2	52.8
Educational attainment*	High School or less	355	39.0	61.0
	Some College	494	43.8	56.2
	College Grad	334	49.4	50.6
	Grad School	315	56.2	43.8
Household Employment Status*	All parents working (FT/PT)*	898	53.2	46.8
	At least one parent not working**	592	35.3	64.7
	1 Parent, unemployed	217	35.8	64.2
	1 Parent, employed (FT/PT)	260	46.5	53.5
	2 Parents, 0 employed	92	31.8	68.2
	2 Parents, 1 employed	283	36.3	63.7
	2 Parents, 2 employed	638	54.7	45.3
Child Age Group	0-4 only	382	47.7	52.3
	0-4 and 5-12 (both age groups)	350	43.6	56.4
	5-12 only	726	45.7	54.3
Region	CCA of Central Washington	62	52.0	48.0
	CCA of Eastern Washington	196	41.4	58.6
	CCA of King and Pierce Co	661	53.1	46.9
	CCA of Northwest Washington	229	43.0	57.0
	CCA of Olympic Peninsula	164	31.3	68.7
	CCA of Southwest Washington	152	34.5	65.5

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.40. Hours of Paid Time Off Taken Due to Child Care Issues

Q19 In the past 12 months, how many hours have you or your spouse or partner taken paid time off due to child care issues?		N	Mean	Median	SD	Min	Max
Total	Total	661	17.5	9.0	28.7	0.0	241.0
Parent Race/Ethnicity	Hispanic	57	19.8	7.6	38.4	0.0	226.0
	NH white	448	17.1	9.0	27.2	0.0	241.0
	NH Black	35	16.3	10.5	18.2	0.0	111.0
	NH API	71	17.1	10.0	20.5	0.0	119.0
	NH Other	39	18.4	6.0	40.5	0.0	237.0
Household Income	Less than \$20,000	45	22.6	11.3	35.9	0.0	161.0
	\$20,000 - \$39,999	102	13.5	10.0	17.9	0.0	130.0
	\$40,000 - \$59,999	103	17.6	7.0	29.2	0.0	170.0
	\$60,000 - \$79,999	81	17.4	8.0	27.6	0.0	223.0
	\$80,000 - \$99,999	82	12.6	6.6	17.2	0.0	145.0
	\$100,000 - \$149,999	128	16.0	10.0	23.8	0.0	241.0
	\$150,000 - \$199,999	64	22.7	10.0	37.6	0.0	237.0
	\$200,000 or more	46	31.5	12.5	51.0	0.0	226.0
Urban/Rural	Rural Area	195	20.2	10.0	38.6	0.0	241.0
	Urbanized Area	444	16.6	9.0	24.1	0.0	237.0
Parent Highest Education	High School or less	119	15.4	8.0	27.3	0.0	241.0
	Some College	208	16.0	7.0	28.6	0.0	190.0
	College Grad	158	15.0	10.0	18.6	0.0	150.0
	Grad School	176	24.5	12.5	37.3	0.0	237.0
Parent Work Status	All parents working (FT/PT)*	464	18.4	10.0	28.0	0.0	237.0
	At least one parent not working**	194	15.3	7.0	30.0	0.0	241.0
	1 Parent, unemployed	73	19.5	8.1	35.0	0.0	170.0
	1 Parent, employed (FT/PT)	127	14.2	5.0	22.1	0.0	145.0
	2 Parents, 0 employed	27	24.7	18.0	40.3	0.0	241.0
	2 Parents, 1 employed	94	10.8	5.0	22.2	0.0	206.0
Child Age Group	0-4 only	171	16.0	8.0	21.6	0.0	170.0
	0-4 and 5-12 (both age groups) (both age groups)	152	19.5	10.0	34.1	0.0	241.0
	5-12 only	319	17.0	9.0	29.7	0.0	237.0
Region	CCA of Central Washington	29	36.9	11.0	57.8	0.0	226.0
	CCA of Eastern Washington	78	14.0	7.0	22.0	0.0	170.0
	CCA of King and Pierce Co	336	17.8	10.0	24.2	0.0	237.0
	CCA of Northwest Washington	95	15.5	7.0	33.3	0.0	241.0
	CCA of Olympic Peninsula	53	17.1	10.0	36.0	0.0	206.0
	CCA of Southwest Washington	53	15.3	8.0	21.0	0.0	90.0

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.41. Days of Paid Time Off Taken Due to Child Care Issues

Q19 In the past 12 months, how many days have you or your spouse or partner taken paid time off due to child care issues?		N	Mean	Median	SD	Min	Max
Total	Total	660	18.3	7.0	34.2	0.0	258.0
Parent Race/Ethnicity	Hispanic	57	17.9	4.0	33.1	0.0	164.0
	NH white	446	17.7	7.0	34.0	0.0	258.0
	NH Black	36	31.5	10.0	56.8	0.0	249.0
	NH API	72	17.3	8.9	28.0	0.0	150.0
	NH Other	38	22.0	8.5	33.3	0.0	153.0
Household Income	Less than \$20,000	43	26.6	7.0	51.7	0.0	206.0
	\$20,000 - \$39,999	102	21.2	9.0	37.1	0.0	258.0
	\$40,000 - \$59,999	104	19.0	10.0	33.7	0.0	199.0
	\$60,000 - \$79,999	81	14.1	7.0	23.9	0.0	120.0
	\$80,000 - \$99,999	81	15.3	5.0	28.3	0.0	160.0
	\$100,000 - \$149,999	127	17.3	5.0	36.3	0.0	249.0
	\$150,000 - \$199,999	66	19.8	7.6	31.2	0.0	175.0
	\$200,000 or more	46	19.2	10.0	32.7	0.0	238.0
Urban/Rural	Rural Area	192	14.7	4.5	26.8	0.0	238.0
	Urbanized Area	446	19.9	7.0	36.3	0.0	258.0
Parent Highest Education	High School or less	118	20.9	7.0	37.9	0.0	237.0
	Some College	208	15.3	5.0	32.5	0.0	258.0
	College Grad	160	14.7	4.0	29.8	0.0	249.0
	Grad School	174	23.0	12.0	35.6	0.0	238.0
Parent Work Status	All parents working (FT/PT)*	467	18.4	7.0	33.1	0.0	258.0
	At least one parent not working**	191	18.1	5.0	36.8	0.0	238.0
	1 Parent, unemployed	72	21.2	7.0	34.5	0.0	164.0
	1 Parent, employed (FT/PT)	126	16.4	7.0	27.8	0.0	237.0
	2 Parents, 0 employed	26	22.1	15.0	42.6	0.0	206.0
	2 Parents, 1 employed	93	15.6	2.0	35.6	0.0	238.0
	2 Parents, 2 employed	341	18.8	7.0	34.0	0.0	258.0
Child Age Group	0-4 only	172	18.9	6.5	37.6	0.0	258.0
	0-4 and 5-12 (both age groups)	149	23.2	8.6	40.1	0.0	206.0
	5-12 only	320	15.0	5.0	26.9	0.0	238.0
Region	CCA of Central Washington	28	11.7	6.0	12.8	0.0	40.0
	CCA of Eastern Washington	77	13.7	4.5	22.6	0.0	200.0
	CCA of King and Pierce Co	338	21.3	8.0	37.7	0.0	258.0
	CCA of Northwest Washington	95	12.6	5.0	19.5	0.0	121.0
	CCA of Olympic Peninsula	53	20.2	4.0	45.1	0.0	238.0
	CCA of Southwest Washington	52	18.4	5.0	33.0	0.0	153.0

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.42. Reduced Time Worked Due to Child Care Issues

Q20 In the past 12 months, have you or your spouse or partner reduced the number of hours or days you work due to child care issues?		N	Yes	No
All	Total	1510	38.6	61.4
Race/Ethnicity*	Hispanic	136	40.4	59.6
	NH white	1035	34.7	65.3
	NH Black	71	45.2	54.8
	NH API	162	46.6	53.4
	NH Other	84	49.1	50.9
Household Income*	Less than \$20,000	164	27.6	72.4
	\$20,000 - \$39,999	233	44.5	55.5
	\$40,000 - \$59,999	239	31.2	68.8
	\$60,000 - \$79,999	209	40.5	59.5
	\$80,000 - \$99,999	183	43.3	56.7
	\$100,000 - \$149,999	253	42.0	58.0
	\$150,000 - \$199,999	105	43.6	56.4
	\$200,000 or more	86	39.0	61.0
Urban/Rural	Rural Area	501	36.2	63.8
	Urbanized Area	961	39.7	60.3
Educational attainment*	High School or less	359	32.9	67.1
	Some College	494	37.5	62.5
	College Grad	336	41.4	58.6
	Grad School	315	47.6	52.4
Household Employment Status*	All parents working (FT/PT)*	899	44.2	55.8
	At least one parent not working**	597	31.0	69.0
	1 Parent, unemployed	219	35.9	64.1
	1 Parent, employed (FT/PT)	262	37.4	62.6
	2 Parents, 0 employed	93	25.1	74.9
	2 Parents, 1 employed	285	31.0	69.0
	2 Parents, 2 employed	637	45.8	54.2
Child Age Group*	0-4 only	383	45.2	54.8
	0-4 and 5-12 (both age groups)	354	37.6	62.4
	5-12 only	726	35.9	64.1
Region*	CCA of Central Washington	63	43.1	56.9
	CCA of Eastern Washington	196	31.0	69.0
	CCA of King and Pierce Co	664	44.2	55.8
	CCA of Northwest Washington	231	40.3	59.7
	CCA of Olympic Peninsula	164	31.2	68.8
	CCA of Southwest Washington	151	27.7	72.3

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.43. Days of Work Reduced Due to Child Care Issues

Q20 In the past 12 months, how many work days have you or your spouse or partner reduced due to child care issues?		N	Mean	Median	SD	Min	Max
Total	Total	560	30.7	12.0	50.7	0.0	291.0
Parent Race/Ethnicity	Hispanic	56	33.8	10.0	61.1	0.0	279.0
	NH white	355	32.0	14.0	51.5	0.0	291.0
	NH Black	34	32.6	14.0	48.7	0.0	239.0
	NH API	70	24.9	9.0	40.4	0.0	251.0
	NH Other	37	29.1	13.9	41.6	0.0	200.0
Household Income	Less than \$20,000	39	28.7	9.0	58.5	0.0	279.0
	\$20,000 - \$39,999	92	30.5	14.0	44.1	0.0	263.0
	\$40,000 - \$59,999	85	37.3	16.6	56.4	0.0	248.0
	\$60,000 - \$79,999	83	24.9	10.0	38.7	0.0	267.0
	\$80,000 - \$99,999	66	24.7	9.0	40.4	0.0	266.0
	\$100,000 - \$149,999	104	31.0	10.0	53.3	0.0	269.0
	\$150,000 - \$199,999	51	41.4	14.0	70.7	0.0	291.0
	\$200,000 or more	35	36.6	25.0	52.8	0.0	245.0
Urban/Rural	Rural Area	164	36.0	10.5	61.2	0.0	267.0
	Urbanized Area	377	28.9	12.5	45.9	0.0	291.0
Parent Highest Education	High School or less	106	29.3	12.5	50.3	0.0	279.0
	Some College	169	28.4	9.0	47.9	0.0	267.0
	College Grad	130	30.9	14.0	51.1	0.0	266.0
	Grad School	155	34.9	16.9	53.7	0.0	291.0
Parent Work Status	All parents working (FT/PT)*	391	33.6	15.0	53.8	0.0	291.0
	At least one parent not working**	167	24.4	9.0	42.5	0.0	279.0
	1 Parent, unemployed	66	31.9	10.0	53.8	0.0	279.0
	1 Parent, employed (FT/PT)	101	31.9	17.5	51.7	0.0	267.0
	2 Parents, 0 employed	24	25.9	14.0	49.3	2.0	267.0
	2 Parents, 1 employed	77	20.1	7.0	31.9	0.0	144.0
Child Age Group	0-4 only	166	25.1	9.3	42.2	0.0	266.0
	0-4 and 5-12 (both age groups)	125	35.4	15.0	54.1	0.0	279.0
	5-12 only	254	31.6	10.9	53.8	0.0	291.0
Region	CCA of Central Washington	23	51.1	10.0	89.3	0.0	248.0
	CCA of Eastern Washington	58	34.9	13.9	62.6	0.0	267.0
	CCA of King and Pierce Co	285	29.7	15.0	45.4	0.0	291.0
	CCA of Northwest Washington	87	25.0	7.5	49.8	0.0	279.0
	CCA of Olympic Peninsula	44	36.8	10.0	47.9	0.0	193.0
	CCA of Southwest Washington	49	25.4	20.0	31.9	0.5	153.0

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.44. Child Care an Issue to Obtaining Employment

		Q21 If you are currently unemployed and seeking employment, is child care an issue that is preventing you from obtaining employment?			
		N	No. Child care is not an issue	Yes. I would like part-time employment	Yes. I would like full-time employment
All	Total	106	53.4	30.5	16.1
Race/Ethnicity*	Hispanic	16	53.2	40.1	6.8
	NH white	63	67.7	10.5	21.7
	NH Black	4	43.9	29.8	26.3
	NH API	11	20.4	69.9	9.8
	NH Other	10	41	22.9	36.1
Household Income*	Less than \$20,000	33	54	25	20.9
	\$20,000 - \$39,999	32	38.3	52.2	9.5
	\$40,000 - \$59,999	12	70.2	8.2	21.6
	\$60,000 - \$79,999	12	85.6	7	7.4
	\$80,000 - \$99,999	6	21	52.8	26.2
	\$100,000 - \$149,999	5	26.8	41.1	32
	\$150,000 - \$199,999	3	100	.	.
	\$200,000 or more	2	76.5	.	23.5
Urban/Rural	Rural Area	34	58.5	30.7	10.9
	Urbanized Area	69	52.6	31.7	15.7
Educational attainment	High School or less	45	46.7	39.7	13.6
	Some College	35	66.2	20.1	13.7
	College Grad	17	48.6	20.7	30.6
	Grad School	9	67	24.3	8.7
Household Employment Status	At least one parent not working*	106	53.4	30.5	16.1
	1 Parent, unemployed	73	55.4	24.3	20.3
	2 Parents, 0 employed	11	40.4	53.7	5.9
	2 Parents, 1 employed	22	58	28	14.1
Child Age Group	0-4 only	30	44.5	41.2	14.2
	0-4 and 5-12 (both age groups)	26	39.4	39.3	21.3
	5-12 only	46	69.4	16.3	14.3
Region	CCA of Central Washington	5	60.8	22.7	16.5
	CCA of Eastern Washington	20	63.1	31.8	5.1
	CCA of King and Pierce Co	38	48.2	40.8	11
	CCA of Northwest Washington	14	47.2	29.6	23.3
	CCA of Olympic Peninsula	16	65.8	12	22.2
	CCA of Southwest Washington	12	65.2	13	21.8

* At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.45. Child Care Issues a Reason to Turn Down Promotion or Job Offer

Q22 In the past 12 months, have you turned down a promotion or job offer due to child care issues?				
		N	Yes	No
All	Total	1086	18.7	81.3
Race/Ethnicity	Hispanic	103	16.9	83.1
	NH white	736	18.0	82.0
	NH Black	56	29.5	70.5
	NH API	126	17.8	82.2
	NH Other	53	27.8	72.2
Household Income	Less than \$20,000	78	20.1	79.9
	\$20,000 - \$39,999	151	25.2	74.8
	\$40,000 - \$59,999	174	20.1	79.9
	\$60,000 - \$79,999	149	19.9	80.1
	\$80,000 - \$99,999	144	13.7	86.3
	\$100,000 - \$149,999	202	17.8	82.2
	\$150,000 - \$199,999	94	13.3	86.7
	\$200,000 or more	81	18.9	81.1
Urban/Rural	Rural Area	315	20.7	79.3
	Urbanized Area	741	17.9	82.1
Educational attainment	High School or less	220	21.7	78.3
	Some College	330	18.0	82.0
	College Grad	256	13.3	86.7
	Grad School	280	21.9	78.1
Household Employment Status	All parents working (FT/PT)*	894	19.0	81.0
	At least one parent not working**	188	17.5	82.5
	1 Parent, unemployed	73	27.1	72.9
	1 Parent, employed (FT/PT)	260	16.9	83.1
	2 Parents, 0 employed	11	31.3	68.7
	2 Parents, 1 employed	104	12.3	87.7
	2 Parents, 2 employed	634	19.4	80.6
Child Age Group*	0-4 only	264	22.9	77.1
	0-4 and 5-12 (both age groups)	233	21.5	78.5
	5-12 only	559	15.0	85.0
Region*	CCA of Central Washington	40	38.2	61.8
	CCA of Eastern Washington	138	13.9	86.1
	CCA of King and Pierce Co	507	21.3	78.7
	CCA of Northwest Washington	160	10.1	89.9
	CCA of Olympic Peninsula	106	22.0	78.0
	CCA of Southwest Washington	111	14.6	85.4

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.46. Child Care Issues Affecting Families

Q23 Which of the following child care issues has had an effect on your family over the past year?														
		N	Finding child care that fits our work schedule	Finding affordable care	Finding high quality care	Finding back up child care	Finding care for a sick child	Finding care for my child with special needs	Finding care close to my home or work	Finding care when school is closed	Finding transportation to and or from child care	Finding information on child care options	Other	None of the above
Total	Total	1536	26.9	36.9	30.4	25.0	19.3	7.2	18.1	21.4	12.2	10.8	2.8	31.0
Parent Race / Ethnicity	Hispanic	139	26.5	38.2	25.4	27.1	16.3	4.6	17.5	15.5	8.9	12.4	0.6	28.0
	NH white	1047	26.0	33.8	30.5	26.2	19.9	9.5	15.6	22.5	10.6	8.7	3.7	34.3
	NH Black	73	29.0	44.1	26.7	17.9	15.5	2.5	24.8	10.5	12.0	10.4	0.0	21.5
	NH API	165	28.0	41.3	33.1	20.4	20.2	3.7	22.4	24.6	17.9	16.2	2.4	28.4
	NH Other	85	31.0	49.0	39.0	28.7	25.0	7.4	29.6	27.8	24.8	12.9	2.9	21.8
Household Income	Less than \$20,000	173	23.7	36.2	23.6	16.1	12.3	5.0	20.2	13.9	16.7	8.0	2.5	39.5
	\$20,000 - \$39,999	238	27.0	40.1	26.3	28.1	21.2	8.4	22.6	23.9	15.2	9.9	5.7	24.1
	\$40,000 - \$59,999	242	27.8	47.4	34.9	26.5	18.9	7.4	14.0	20.7	11.6	13.4	1.6	30.2
	\$60,000 - \$79,999	209	23.8	33.9	24.4	25.4	20.3	5.7	13.9	17.8	10.5	9.8	1.4	35.6
	\$80,000 - \$99,999	184	29.4	41.2	32.1	29.1	17.3	5.5	21.4	21.7	10.5	9.5	6.0	29.2
	\$100,000 - \$149,999	255	29.6	32.1	37.6	27.2	23.8	8.5	18.9	26.7	10.6	10.6	1.5	28.6
	\$150,000 - \$199,999	107	24.9	29.0	30.1	19.4	23.2	7.6	20.9	20.8	10.8	16.4	1.1	24.9
	\$200,000 or more	86	30.5	29.3	36.9	24.8	17.8	10.0	15.2	27.4	12.7	13.5	0.0	35.1
Urban / Rural	Rural Area	506	23.6	36.5	28.0	27.4	16.9	6.4	15.7	21.5	11.8	8.1	2.8	34.8
	Urbanized Area	977	28.3	37.6	31.0	24.2	20.3	7.2	19.3	21.7	12.7	12.0	2.7	29.2
Parent Highest Education	High School or less	370	23.9	36.5	23.8	23.0	18.3	8.9	17.1	18.6	12.5	9.8	3.3	35.1
	Some College	500	27.0	38.9	26.1	29.3	21.1	3.6	16.5	21.1	11.9	9.8	3.3	29.9
	College Grad	339	29.8	36.9	37.7	24.6	19.1	5.3	18.5	21.4	9.2	10.2	1.8	32.5
	Grad School	317	28.9	35.5	40.7	23.2	19.2	12.8	22.6	27.9	16.3	15.5	1.9	22.6
Parent Work Status	All parents working (FT/PT)*	909	31.6	40.4	33.8	29.1	23.4	8.1	20.1	26.1	12.6	12.1	2.3	24.3
	At least one parent not working**	604	20.9	33.3	26.4	20.0	14.2	6.2	16.0	15.6	12.1	9.3	3.5	40.7
	1 Parent, unemployed	225	27.0	39.6	29.3	24.1	17.8	3.6	20.2	22.1	19.2	8.1	4.2	38.1
	1 Parent, employed (FT/PT)	269	31.1	41.0	31.0	35.2	26.0	5.2	24.0	24.5	17.2	10.4	0.8	25.2
	2 Parents, 0 employed	94	15.6	25.2	13.0	10.2	13.9	5.1	9.2	10.1	6.0	5.2	6.6	42.5
	2 Parents, 1 employed	285	20.1	33.3	29.7	21.7	12.6	7.6	16.4	14.6	11.2	11.3	2.1	41.2
	2 Parents, 2 employed	640	31.7	40.2	34.5	27.6	22.7	8.8	19.2	26.4	11.5	12.6	2.6	24.1
Child Age Group	0-4 only	392	33.7	48.5	36.1	27.8	19.1	6.8	23.7	12.2	9.1	13.3	2.4	22.7
	0-4 and 5-12 (both age groups)	356	25.7	34.5	28.5	25.6	22.8	9.3	17.8	25.2	13.4	14.6	1.6	35.4
	5-12 only	733	24.4	31.7	28.0	24.1	18.3	7.0	15.3	25.9	12.8	8.1	3.0	34.2
Region	CCA of Central Washington	63	27.2	43.3	27.4	47.2	15.7	6.1	24.0	33.2	7.4	20.1	4.3	20.9
	CCA of Eastern Washington	199	25.5	32.3	26.1	23.1	14.9	7.3	11.1	21.0	9.8	5.9	1.9	38.8
	CCA of King and Pierce Co	674	30.1	36.8	34.6	25.0	22.3	7.9	21.4	25.4	13.9	13.7	2.2	27.3

Q23 Which of the following child care issues has had an effect on your family over the past year?													
	N	Finding child care that fits our work schedule	Finding affordable care	Finding high quality care	Finding back up child care	Finding care for a sick child	Finding care for my child with special needs	Finding care close to my home or work	Finding care when school is closed	Finding transportation to and or from child care	Finding information on child care options	Other	None of the above
CCA of Northwest Washington	233	28.2	42.4	26.9	27.8	15.6	6.3	20.0	14.6	11.3	10.9	4.2	25.7
CCA of Olympic Peninsula	164	18.9	36.1	27.4	19.2	17.7	5.8	13.8	17.3	14.1	9.4	3.8	41.2
CCA of Southwest Washington	157	19.7	35.8	24.4	20.8	20.0	6.9	13.9	15.9	10.3	2.4	2.2	38.7

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.47. Child Care Issues Affecting Families Text Responses for Other

Q23: Which of the following child care issues has had an effect on your family over the past year? OTHER responses.
Single mother. Sometimes it just gets hard, especially with this virus it is really hard to try and go out there and get a job.
Making sure one of us is always available in case a child is sick or needs something at school. So sometimes one work schedule will be too tight for the week and the other needs to free up some time. I was employed until COVID
Finding a place I can trust
There has been no new issues with the child care that we've been dealing with since
Transportation to child care
Good maintenance
No one can carry
The one we can trust
Maternity leave
I am the child care facility
Parents schedule
Schedules matching up
When they are alone and feel tensed for education.
Finding a short term or sudden babysitter.
About who is going to watch our child.
Well the cost is just too much
Being scared because my child is so young
Constant care is needed now that they are home every day because of COV 19
Finding work that allows me to take my child with me.
Finding people we trust to watch our kids
Overnight
We leave him with our older family mem
Finding child care that will take an infant
When I have unexpected working objectives.
Being able to afford a piece of mind that my kid is in good hands
Secure
Child care that can be trusted
Finding someone you can trust and we don't do daycare or anything like that
My child doesn't want to go.
Covid19
Only one parent working because it cost too much for child care
No time
Bad Relationships
I have nothing to say
Trust issues

Table B.48. Frequency of Inability to do Job Due to Child Care Arrangements

Q24 How often is your ability to do your job negatively affected by your child care arrangement(s)?		N	Never	Rarely	Sometimes	Often	Always
All	Total	1495	31.2	35.2	26.1	5.5	1.9
Race/Ethnicity*	Hispanic	134	29.0	32.2	34.0	3.8	1.0
	NH white	1031	35.0	35.8	21.1	5.8	2.3
	NH Black	71	17.5	34.6	37.6	3.1	7.2
	NH API	157	26.6	36.9	28.0	7.8	0.7
	NH Other	83	20.7	36.2	38.5	4.6	.
Household Income	Less than \$20,000	159	43.0	25.5	21.7	6.7	3.1
	\$20,000 - \$39,999	232	33.9	31.4	25.5	8.5	0.7
	\$40,000 - \$59,999	239	29.7	33.8	28.0	6.0	2.5
	\$60,000 - \$79,999	206	34.7	38.7	20.6	4.7	1.3
	\$80,000 - \$99,999	180	26.6	40.4	27.0	4.3	1.6
	\$100,000 - \$149,999	254	25.8	39.7	28.1	4.1	2.3
	\$150,000 - \$199,999	105	26.4	37.0	28.6	6.1	1.9
	\$200,000 or more	85	23.5	35.1	32.9	5.2	3.3
Urban/Rural	Rural Area	494	33.4	35.4	24.7	5.0	1.5
	Urbanized Area	955	29.9	35.4	27.0	5.9	1.9
Educational attainment*	High School or less	353	40.4	28.5	24.6	5.0	1.5
	Some College	489	29.7	38.1	25.1	5.4	1.8
	College Grad	334	28.5	38.2	26.3	5.6	1.4
	Grad School	316	20.5	39.1	30.1	6.7	3.6
Household Employment Status*	All parents working (FT/PT)*	901	21.5	41.3	29.3	5.4	2.5
	At least one parent not working**	584	45.9	26.1	21.1	5.8	1.1
	1 Parent, unemployed	216	37.5	25.9	26.0	7.2	3.3
	1 Parent, employed (FT/PT)	265	20.1	41.4	32.6	5.0	1.0
	2 Parents, 0 employed	89	53.7	19.5	21.3	5.5	.
	2 Parents, 1 employed	279	46.9	28.3	19.0	5.3	0.5
	2 Parents, 2 employed	636	21.8	41.2	28.6	5.5	2.8
Child Age Group	0-4 only	380	30.4	33.4	26.1	6.8	3.4
	0-4 and 5-12 (both age groups)	350	32.1	31.1	28.2	6.6	1.9
	5-12 only	719	30.6	38.5	25.6	4.3	1.0
Region*	CCA of Central Washington	61	20.2	38.2	35.9	2.8	2.9
	CCA of Eastern Washington	195	41.7	32.1	20.4	5.3	0.6
	CCA of King and Pierce Co	658	26.0	35.9	28.6	6.7	2.8
	CCA of Northwest Washington	229	31.2	33.8	28.1	5.5	1.5
	CCA of Olympic Peninsula	159	37.8	31.7	26.0	3.7	0.9
	CCA of Southwest Washington	154	36.2	41.4	17.0	4.7	0.8

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.49. Financial Hardship or Changes as a Result of the Cost of Child Care

Q25 Has your household experienced any financial hardship or made financial changes as a result of the cost of child care?		N	Yes	No
All	Total	1478	35.5	64.5
Race/Ethnicity	Hispanic	133	28.6	71.4
	Non-Hispanic white	1018	35.3	64.7
	NH Black	70	49.1	50.9
	NH API	155	38.8	61.2
	NH Other	82	44.5	55.5
Household Income	Less than \$20,000	161	34.1	65.9
	\$20,000 - \$39,999	229	36.3	63.7
	\$40,000 - \$59,999	239	42.0	58.0
	\$60,000 - \$79,999	202	36.0	64.0
	\$80,000 - \$99,999	179	33.8	66.2
	\$100,000 - \$149,999	252	32.9	67.1
	\$150,000 - \$199,999	103	35.1	64.9
	\$200,000 or more	84	33.1	66.9
Urban/Rural*	Rural Area	494	30.2	69.8
	Urbanized Area	939	38.2	61.8
Educational attainment	High School or less	350	34.2	65.8
	Some College	484	34.5	65.5
	College Grad	329	37.7	62.3
	Grad School	310	37.0	63.0
Household Employment Status	All parents working (FT/PT)*	888	37.0	63.0
	At least one parent not working**	581	33.7	66.3
	1 Parent, unemployed	214	36.5	63.5
	1 Parent, employed (FT/PT)	256	42.3	57.7
	2 Parents, 0 employed	89	32.1	67.9
	2 Parents, 1 employed	278	33.1	66.9
	2 Parents, 2 employed	632	35.8	64.2
Child Age Group	0-4 only	379	44.1	55.9
	0-4 and 5-12 (both age groups)	345	38.1	61.9
	5-12 only	707	29.3	70.7
Region	CCA of Central Washington	62	35.4	64.6
	CCA of Eastern Washington	192	31.9	68.1
	CCA of King and Pierce Co	649	39.0	61.0
	CCA of Northwest Washington	223	36.2	63.8
	CCA of Olympic Peninsula	160	30.5	69.5
	CCA of Southwest Washington	154	33.3	66.7

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.50. Financial Assistance Types Received by Families

Q26 Does your family receive assistance from any of the following?											
		N	Assistance from a public benefit program (like Head Start, ECEAP, Working Connections or city-funded program)	Free program offered through a public school	Scholarship, financial aid, sliding-fee-scale, or reduced fee offered by child care provider	Employer offers flexible spending accounts that can be used for child care	Employer pays part or all of the cost of child care	Employer offers on-site child care at free or reduced cost	Relative or friend helps to pay for child care	No assistance from any source	
Total	Total	1536	9.9	14.2	7.3	7.5	4.8	3.3	6.8	61.5	
Parent Race / Ethnicity	Hispanic	139	7.8	21.9	8.7	3.5	2.0	5.2	6.4	54.3	
	NH white	1047	10.5	11.8	7.4	6.9	5.1	3.2	6.3	66.3	
	NH Black	73	12.6	15.7	5.3	11.4	2.6	1.0	4.0	52.6	
	NH API	165	7.0	14.2	6.8	13.5	8.1	3.1	7.3	59.8	
	NH Other	85	20.2	16.9	7.4	8.2	4.0	2.8	15.3	47.7	
Household Income	Less than \$20,000	173	12.6	18.7	7.5	4.0	1.1	0.4	5.0	51.6	
	\$20,000 - \$39,999	238	14.9	22.3	9.2	3.3	1.5	0.9	11.0	53.4	
	\$40,000 - \$59,999	242	10.0	16.4	7.3	2.2	5.2	4.6	7.0	67.0	
	\$60,000 - \$79,999	209	8.4	10.2	4.5	6.3	2.0	2.9	4.4	70.9	
	\$80,000 - \$99,999	184	7.0	9.8	6.7	3.9	3.5	2.2	6.0	70.7	
	\$100,000 - \$149,999	255	6.3	11.8	5.8	14.8	5.2	5.1	6.8	62.0	
	\$150,000 - \$199,999	107	10.1	10.9	10.0	12.8	16.3	6.1	9.1	53.0	
Urban / Rural	\$200,000 or more	86	15.5	10.9	15.2	27.4	12.5	8.2	5.9	48.3	
	Rural Area	506	8.1	13.7	6.4	4.3	2.6	2.8	6.7	66.6	
Parent Highest Education	Urbanized Area	977	11.3	14.3	7.5	8.9	5.9	3.5	7.1	60.1	
	High School or less	370	10.7	18.9	7.4	2.8	1.1	1.4	7.1	61.4	
Parent Work Status	Some College	500	9.0	13.9	6.4	3.3	2.8	2.2	7.8	65.4	
	College Grad	339	8.2	11.1	5.7	10.3	7.9	2.8	4.7	63.3	
	Grad School	317	12.6	10.4	10.9	19.6	10.7	9.7	7.6	54.2	
	All parents working (FT/PT)*	909	10.6	12.8	8.9	10.6	6.6	4.6	7.8	60.3	
Parent Work Status	At least one parent not working**	604	9.4	17.0	4.7	3.3	2.3	1.7	5.6	64.7	
	1 Parent, unemployed	225	20.7	23.4	6.0	2.1	3.7	0.4	9.0	44.8	
	1 Parent, employed (FT/PT)	269	20.1	15.2	8.8	4.3	1.3	1.7	11.5	55.6	
	2 Parents, 0 employed	94	14.0	24.9	5.5	1.4	3.2	2.5	5.7	59.6	
	2 Parents, 1 employed	285	2.8	11.4	3.8	4.4	1.4	2.0	4.1	75.1	

Q26 Does your family receive assistance from any of the following?										
	N	Assistance from a public benefit program (like Head Start, ECEAP, Working Connections or city-funded program)	Free program offered through a public school	Scholarship, financial aid, sliding-fee-scale, or reduced fee offered by child care provider	Employer offers flexible spending accounts that can be used for child care	Employer pays part or all of the cost of child care	Employer offers on-site child care at free or reduced cost	Relative or friend helps to pay for child care	No assistance from any source	
	2 Parents, 2 employed	640	8.3	12.2	8.9	12.2	7.9	5.3	6.9	61.4
Child Age Group	0-4 only	392	8.2	7.2	5.5	7.5	5.0	4.2	6.1	64.8
	0-4 and 5-12 (both age groups)	356	12.3	19.9	5.0	6.6	4.6	3.4	9.6	61.1
	5-12 only	733	10.2	16.7	9.8	8.0	5.0	2.9	6.4	60.3

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.51. Child Care Preferences

Q27 I prefer child care that is provided in:		N	A child care center	A family member or friend's home	Another person's home	My own home	A licensed child care program	A program at a public school	No preference
All	Total	1500	10.2	21.6	1.4	39.4	13.4	6.4	7.6
Race / Ethnicity	Hispanic	136	7.9	29.2	.	39.5	12.9	6.1	4.5
	NH white	1031	10.2	18.7	1.5	42.5	13.5	5.6	8.1
	NH Black	69	14.0	30.4	4.3	20.6	18.7	6.8	5.3
	NH API	161	11.8	22.6	.	35.6	10.9	10.2	8.9
	NH Other	83	12.4	18.1	8.7	29.5	18.4	3.1	9.8
Household Income*	Less than \$20,000	159	10.8	25.2	3.8	30.5	9.7	5.4	14.5
	\$20,000 - \$39,999	232	8.8	28.3	1.7	37.1	12.1	5.5	6.5
	\$40,000 - \$59,999	240	7.0	22.6	1.0	39.6	14.6	8.6	6.5
	\$60,000 - \$79,999	208	8.8	20.3	0.7	48.1	6.8	7.7	7.6
	\$80,000 - \$99,999	181	9.9	20.5	1.1	44.5	13.1	5.1	5.9
	\$100,000 - \$149,999	254	10.5	19.8	1.8	35.9	13.3	7.8	10.8
	\$150,000 - \$199,999	106	19.3	17.5	0.9	40.6	18.3	0.3	3.2
	\$200,000 or more	84	15.3	11.2	0.6	32.4	33.5	5.5	1.3
Urban / Rural	Rural Area	498	8.1	23.8	0.8	41.2	13.1	4.4	8.6
	Urbanized Area	957	11.1	20.5	1.7	39.3	13.5	7.0	6.8
Educational attainment*	High School or less	353	7.0	25.2	1.7	39.5	10.2	7.4	9.0
	Some College	491	9.2	27.1	1.6	36.6	11.7	5.5	8.3
	College Grad	335	12.8	14.1	1.0	44.8	12.9	6.2	8.3
	Grad School	316	14.3	16.9	1.2	35.6	22.8	6.2	3.0
Household Employment Status*	All parents working (FT/PT)*	900	11.9	22.6	0.9	36.0	15.4	6.4	6.7
	At least one parent not working**	588	7.6	20.5	2.3	44.0	10.7	6.4	8.5
	1 Parent, unemployed	215	8.9	26.6	1.1	36.6	12.9	6.0	7.8
	1 Parent, Employed (FT/PT)	263	10.5	30.9	0.7	31.2	10.6	7.2	8.9
	2 Parents, 0 employed	91	7.1	19.3	4.5	45.6	7.7	7.5	8.3
	2 Parents, 1 employed	282	7.3	18.4	2.0	46.5	10.7	6.2	8.9
	2 Parents, 2 employed	637	12.2	20.7	0.9	37.1	16.6	6.2	6.2
Child Age Group*	0-4 only	381	16.4	18.3	1.7	35.2	18.9	4.2	5.3
	0-4 and 5-12 (both age groups)	352	10.1	20.5	0.9	42.8	10.9	7.2	7.6
	5-12 only	722	6.9	23.9	1.2	40.9	11.1	7.4	8.5
Region	CCA of Central Washington	62	6.8	26.1	0.8	35.6	23.6	6.5	0.7
	CCA of Eastern Washington	197	8.4	23.0	1.3	48.0	6.8	4.5	8.0
	CCA of King and Pierce Co	658	12.5	20.5	1.2	37.9	13.8	7.8	6.2
	CCA of Northwest Washington	230	8.9	24.8	0.9	38.4	12.5	7.0	7.5
	CCA of Olympic Peninsula	161	4.5	22.9	2.8	41.3	18.1	1.9	8.5
	CCA of Southwest Washington	154	10.5	16.6	2.0	39.2	13.1	5.6	13.0

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.52. Child Care Needed Outside of Regular/Traditional Daytime Hours

Q28 Do you have a need for child care outside of regular/traditional daytime hours (6:00am - 6:00pm Monday thru Friday)?		N	Yes	No
All	Total	1503	25.3	74.7
Race/Ethnicity	Hispanic	136	32.5	67.5
	NH white	1033	23.4	76.6
	NH Black	69	34.8	65.2
	NH API	162	21.7	78.3
	NH Other	84	28.7	71.3
Household Income*	Less than \$20,000	162	24.5	75.5
	\$20,000 - \$39,999	234	29.3	70.7
	\$40,000 - \$59,999	240	23.4	76.6
	\$60,000 - \$79,999	208	22.8	77.2
	\$80,000 - \$99,999	181	20.6	79.4
	\$100,000 - \$149,999	253	21.6	78.4
	\$150,000 - \$199,999	105	35.9	64.1
	\$200,000 or more	85	43.2	56.8
Urban/Rural	Rural Area	502	22.6	77.4
	Urbanized Area	953	26.5	73.5
Educational attainment*	High School or less	356	22.8	77.2
	Some College	494	22.9	77.1
	College Grad	335	24.9	75.1
	Grad School	314	34.2	65.8
Household Employment Status*	All parents working (FT/PT)*	897	30.2	69.8
	At least one parent not working**	593	17.8	82.2
	1 Parent, unemployed	217	29.1	70.9
	1 Parent, employed (FT/PT)	264	28.4	71.6
	2 Parents, 0 employed	92	13.0	87.0
	2 Parents, 1 employed	284	14.6	85.4
	2 Parents, 2 employed	633	30.7	69.3
Child Age Group	0-4 only	384	27.5	72.5
	0-4 and 5-12 (both age groups)	354	22.7	77.3
	5-12 only	720	25.0	75.0
Region*	CCA of Central Washington	61	39.2	60.8
	CCA of Eastern Washington	196	20.7	79.3
	CCA of King and Pierce Co	656	28.7	71.3
	CCA of Northwest Washington	231	24.0	76.0
	CCA of Olympic Peninsula	164	21.4	78.6
	CCA of Southwest Washington	154	16.7	83.3

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.53. Non-traditional Child Care Schedule Needs

Q29 When do you have a need for child care outside of regular/traditional hours?		N	Evenings (6:00-9:00pm)	Nights (9:00pm-6:00am)	Weekend days	Weekend evenings or nights	Other
Total	Total	391	50.9	28.3	48.6	26.1	6.6
Parent Race/Ethnicity	Hispanic	42	50.0	24.4	40.0	19.7	11.9
	NH white	256	51.3	30.1	51.4	29.0	4.7
	NH Black	27	35.9	27.7	60.1	11.2	2.3
	NH API	39	52.2	23.6	50.2	28.4	9.8
	NH Other	24	59.7	37.2	40.0	30.4	1.5
Household Income	Less than \$20,000	39	35.9	27.5	51.7	24.9	12.6
	\$20,000 - \$39,999	69	59.4	33.3	50.4	34.6	7.3
	\$40,000 - \$59,999	62	45.6	47.6	48.6	26.8	8.6
	\$60,000 - \$79,999	49	50.9	29.0	57.2	37.8	4.9
	\$80,000 - \$99,999	40	57.5	28.0	29.0	25.4	16.0
	\$100,000 - \$149,999	58	59.5	26.6	39.6	21.5	0.0
	\$150,000 - \$199,999	33	45.4	8.8	61.4	13.0	0.0
	\$200,000 or more	38	43.3	11.3	54.6	15.0	3.5
Urban/Rural	Rural Area	110	45.5	29.7	53.0	25.6	7.7
	Urbanized Area	271	53.3	27.3	48.7	26.9	5.5
Parent Highest Education	High School or less	81	45.1	39.8	47.7	26.5	8.7
	Some College	118	51.8	35.8	45.8	35.6	9.4
	College Grad	84	57.2	15.2	43.7	21.7	6.2
	Grad School	107	50.7	19.1	57.8	19.3	1.7
Parent Work Status	All parents working (FT/PT)*	279	50.3	26.5	48.5	21.9	7.7
	At least one parent not working**	110	54.7	30.5	51.3	37.9	3.1
	1 Parent, unemployed	63	55.4	37.1	45.1	40.4	7.9
	1 Parent, employed (FT/PT)	82	49.8	30.7	33.0	27.0	18.0
	2 Parents, 0 employed	12	56.4	38.6	73.0	25.7	0.0
	2 Parents, 1 employed	35	53.6	22.6	49.8	39.6	0.0
Child Age Group	0-4 only	104	50.4	27.2	56.0	27.2	4.6
	0-4 and 5-12 (both age groups)	91	52.7	35.2	40.8	30.0	9.8
	5-12 only	185	50.9	26.7	45.0	24.0	6.5
Region	CCA of Central Washington	21	44.1	27.9	30.4	32.3	13.6
	CCA of Eastern Washington	42	50.0	29.8	44.8	30.5	0.0
	CCA of King and Pierce Co	194	51.6	25.2	51.3	25.3	5.2
	CCA of Northwest Washington	53	55.9	25.1	51.4	21.9	9.4
	CCA of Olympic Peninsula	37	49.5	41.7	70.5	35.0	8.9
	CCA of Southwest Washington	36	49.4	31.4	28.2	20.7	7.9

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.54. Non-traditional Child Care Schedule Needs, Text Responses for Other

Q29OE: When do you have a need for child care outside of regular/traditional hours?
Various hours
Early mornings
I don't need night child care
Need it for when I got to work and no one is here
Every other Saturday morning to mid afternoon
I am a mechanic and you never know
During the work day.
Date night
8am-3pm
Depending on husband work schedule errands that need to be done.
6am-5pm
4am
When we are not in home
If I could find affordable and trust worthy child care during the day, that would be great
When we want time out together.
When I have some unexpected objectives to do at work or with friends.
I did not mean to select other.
Day off
I don't need childcare outside those regular hours
Weekday morning
During the Daytime
5am to 6pm
Childcare able to cover on a whim so overtime hours can be done.

Table B.55. Average Time to Transport Children to and From Child Care Each Day

Q30 Approximately how many minutes does it take to transport your child(ren) to and from (round trip) child care each day?		N	less than 5 minutes	5-60 minutes	5-15 minutes	16-30 minutes	31-60 minutes	More than 60 minutes
All	Total	1388	35.5	1.9	21.0	23.6	13.7	4.3
Race/Ethnicity*	Hispanic	126	36.1	1.5	24.4	28.6	7.3	2.2
	NH white	968	37.9	1.6	18.2	22.6	15.1	4.5
	NH Black	66	23.7	6.6	28.4	19.6	15.5	6.2
	NH API	134	30.4	1.9	29.5	20.2	13.6	4.5
	NH Other	78	27.0	3.7	13.4	31.7	17.7	6.5
Household Income*	Less than \$20,000	140	37.1	4.7	15.9	22.0	13.3	7.0
	\$20,000 - \$39,999	219	39.8	0.5	20.3	28.5	9.3	1.5
	\$40,000 - \$59,999	226	39.6	2.7	17.0	26.2	10.5	4.1
	\$60,000 - \$79,999	189	36.1	1.9	21.3	22.4	15.7	2.7
	\$80,000 - \$99,999	172	43.0	1.1	21.1	19.4	10.0	5.5
	\$100,000 - \$149,999	230	30.3	2.6	20.6	21.4	18.7	6.4
	\$150,000 - \$199,999	103	27.0	1.0	26.6	25.3	16.0	4.1
	\$200,000 or more	83	14.3	0.8	36.4	22.6	20.1	5.8
Urban/Rural	Rural Area	449	42.4	1.6	19.4	20.3	12.5	3.8
	Urbanized Area	900	32.7	2.0	21.8	25.0	13.9	4.5
Educational attainment*	High School or less	312	39.6	2.5	18.4	22.9	12.8	3.8
	Some College	457	40.5	0.6	18.5	22.6	12.9	4.9
	College Grad	311	35.9	1.7	23.6	25.9	10.5	2.4
	Grad School	306	20.1	3.5	25.9	23.4	20.4	6.8
Household Employment Status*	All parents working (FT/PT)*	867	28.6	1.9	23.7	24.7	16.2	4.9
	At least one parent not working**	514	46.3	2.0	16.9	21.9	9.6	3.4
	1 Parent, unemployed	193	37.8	2.5	18.0	27.2	9.2	5.3
	1 Parent, employed (FT/PT)	259	28.7	3.0	21.1	27.3	15.2	4.8
	2 Parents, 0 employed	86	49.1	2.6	13.7	17.9	13.6	3.1
	2 Parents, 1 employed	235	49.1	1.5	17.6	21.0	8.2	2.6
Child Age Group	2 Parents, 2 employed	608	28.6	1.6	24.3	24.1	16.5	5.0
	0-4 only	348	35.6	1.5	20.7	22.4	14.5	5.2
	0-4 and 5-12 (both age groups)	327	33.6	1.7	21.3	23.9	15.9	3.5
Region*	5-12 only	677	36.1	1.8	21.4	24.9	12.2	3.7
	CCA of Central Washington	59	30.6	1.2	17.7	43.6	5.0	1.8
	CCA of Eastern Washington	180	44.5	2.1	25.8	18.3	7.4	1.9
	CCA of King and Pierce Co	629	28.8	2.2	22.0	25.6	16.0	5.4
	CCA of Northwest Washington	211	42.7	1.6	18.4	18.0	14.7	4.6
	CCA of Olympic Peninsula	137	41.6	1.6	15.8	22.6	14.0	4.4
	CCA of Southwest Washington	140	41.0	1.2	21.6	21.1	11.7	3.5

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.56. Transportation Options Used To Transport Children to and From Child Care

Q31 Please select all the transportation options your family uses to transport your child(ren) to and from child care.											
	N	Parent or other adult drives child(ren)	Friend family member or neighbor drives child(ren)	Carpool Vanpool	Public Transportation (bus, train, ferry, etc.)	Bicycle	Walk	A caregiver comes to our home	Other		
Total	Total	1536	74.8	18.5	5.1	6.9	3.4	11.1	7.6	6.5	
Parent Race / Ethnicity	Hispanic	139	75.4	18.8	3.5	2.4	1.6	7.8	5.1	8.3	
	NH white	1047	74.5	20.0	4.5	7.8	4.0	12.8	9.1	7.3	
	NH Black	73	60.0	11.4	15.4	10.2	4.7	4.2	5.7	4.6	
	NH API	165	81.3	12.4	5.3	4.7	1.6	7.9	6.1	3.1	
	NH Other	85	72.4	26.7	7.0	18.1	4.6	18.0	5.6	4.0	
Household Income	Less than \$20,000	173	52.9	19.0	3.8	11.6	3.6	19.7	3.4	11.3	
	\$20,000 - \$39,999	238	79.2	19.4	2.7	5.4	2.3	11.3	8.1	5.6	
	\$40,000 - \$59,999	242	77.5	20.9	5.8	4.9	3.7	6.9	7.2	4.4	
	\$60,000 - \$79,999	209	70.9	14.1	5.4	7.2	2.9	10.6	7.9	9.5	
	\$80,000 - \$99,999	184	77.4	18.3	3.3	4.7	2.3	12.9	6.4	6.4	
	\$100,000 - \$149,999	255	77.3	19.3	6.8	5.7	3.6	12.2	6.6	7.6	
	\$150,000 - \$199,999	107	83.1	23.1	8.4	8.5	5.2	9.0	11.4	0.9	
	\$200,000 or more	86	81.5	18.7	7.7	15.5	6.0	7.4	16.7	1.1	
Urban / Rural	Rural Area	506	76.5	18.6	2.9	4.6	2.3	10.0	5.5	7.9	
	Urbanized Area	977	75.2	18.3	6.2	8.2	3.8	11.8	8.5	5.5	
Parent Highest Education	High School or less	370	68.2	17.6	4.2	6.0	2.8	11.1	7.2	8.1	
	Some College	500	76.6	21.1	4.9	4.7	2.3	11.6	6.4	6.6	
	College Grad	339	81.0	15.4	4.2	3.6	3.7	10.7	6.6	5.2	
	Grad School	317	77.2	20.9	8.2	16.7	5.9	10.8	11.6	4.9	
Parent Work Status	All parents working (FT/PT)*	909	79.7	22.3	5.7	7.5	3.2	9.1	8.0	4.2	
	At least one parent not working**	604	70.1	13.1	4.4	6.3	3.7	14.5	7.3	9.6	
	1 Parent, unemployed	225	72.4	24.5	4.2	10.9	2.6	12.4	10.4	10.4	
	1 Parent, employed (FT/PT)	269	76.1	29.8	4.8	7.3	1.0	11.5	7.6	4.3	
	2 Parents, 0 employed	94	65.8	9.8	6.2	4.9	6.1	20.3	7.8	5.0	
	2 Parents, 1 employed	285	70.5	9.4	3.8	4.8	3.4	13.3	5.8	10.9	
2 Parents, 2 employed	640	80.6	20.5	5.9	7.6	3.8	8.5	8.0	4.2		
Child Age Group	0-4 only	392	70.6	15.0	3.8	5.9	1.7	9.9	7.0	7.7	
	0-4 and 5-12 (both age groups)	356	77.2	18.1	6.2	8.5	2.1	10.2	9.6	7.8	
	5-12 only	733	77.9	21.1	5.0	7.2	5.1	12.3	7.5	5.0	
Region	CCA of Central Washington	63	82.5	24.4	0.0	4.4	2.7	9.2	6.3	1.4	

Q31 Please select all the transportation options your family uses to transport your child(ren) to and from child care.											
	N	Parent or other adult drives child(ren)	Friend family member or neighbor drives child(ren)	Carpool Vanpool	Public Transportation (bus, train, ferry, etc.)	Bicycle	Walk	A caregiver comes to our home	Other		
CCA of Eastern Washington	199	73.0	18.2	3.7	7.1	4.2	13.4	8.6	4.9		
CCA of King and Pierce Co	674	75.6	18.4	7.1	8.4	4.5	13.0	9.3	4.7		
CCA of Northwest Washington	233	75.9	18.7	4.8	4.6	0.9	6.2	4.3	8.3		
CCA of Olympic Peninsula	164	74.5	17.1	1.9	6.7	0.5	12.3	6.6	7.9		
CCA of Southwest Washington	157	75.7	18.4	4.0	6.0	4.8	7.6	4.9	11.3		

* All parents working (FT/PT) is subtotal of 1 Parent, employed (FT/PT) and 2 Parents, 2 employed

** At least one parent not working is subtotal of 1 Parent, unemployed, 2 Parents, 0 employed, and 2 Parents, 1 employed

Table B.57. Transportation Options Used to Transport Children to and From Child Care Text Responses for Other

Q31: Please select all the transportation options your family uses to transport your child(ren) to and from child care. [OTHER]
Either my husband, myself, or my older children watch my children, so there is no transportation needed.
Driving our car
Child stays home with me
Status
Wife stays home to care for child
I drive them
Stay at home
No transport
Child stays home.
My children stay home with me
Mom watches child at home
Home
I watch my son in our home, so no transportation is needed
We do not use transportation for child care
No transportation, stays home
Not applicable, child care is at my home
Child stays home with parent
I take him there daily and either my spouse or I pick him up
They don't go to child care so we don't transport
No need for transportation.
Don't transport
My children don't have a child care
At home - drive SUV from home to school, and school to home
All childcare takes place in my home so there is no need for transport.
Plane when going to grandparents.
Bus
Caregiver already present
We stay at home, so there is no transportation.
The after school program provides a bus
I drive them or the child walks
Stays home
No transport to any child care besides schooling and the bus took one and I drove the other and now I drive both
The child stays with one of us the majority of the time so there is no transportation needed.
None we stay home
Own Vehicle
School bus
Grandma
Not in child care
Children stay with parents

Q31: Please select all the transportation options your family uses to transport your child(ren) to and from child care. [OTHER]
None needed
We don't use
Children stay home
We don't have child care - my husband stays at home
We don't take our kids to child care
Children
I'm a stay at home mom.
My own car
Does not go to childcare
Boat.
My child stays home for childcare
Children stay at home for care
Stays home with mom
No after care
I don't use any of them
Myself
Child stay home. No transportation needed.
I stay home
We don't have to transport she is gone with me
We don't go anywhere
We don't use childcare. I personally care for all of my children myself in my home.
The boys stay at home with dad until they walk to school. There is no transportation to childcare
We don't transport our children to childcare, because I am the only one who cares for them as a stay (sic) at home mom.
My children stay home with me
Drive
Don't need transportation
We do not use child care.
Uncle and Auntie and Grand-Parent's
None - stay at home parent
Not Applicable as child stays home alone or friends come to our house.
We care for our children at home
Bus
There is no transport. It is at home

Appendix C. Parent Engagement Question Guide

Washington State Child Care Assessment Discussion Guide for Families

Hello/good morning/good evening. My name is <insert name> and I'll be leading our discussion today. I'll be taking notes during our conversation, but information shared in our conversation will be captured anonymously. Before we get started, we would like to thank you for taking time out of your day to talk with us. We know how busy you are, so we'll do our best to make your time worthwhile. We'll try to keep the meeting to about one hour, no longer.

Today's talk is part of a series of discussions that are taking place across the state of Washington to learn more about how the state can better support families' child care needs. Your input is very important for the state to understand what the greatest needs are for child care and how they can help.

As stated in the consent form, speaking with us is voluntary, and you may decide to stop at any time. This work is being done in partnership between MomsRising and an independent evaluation company, not a state program or agency. There are no wrong answers—this is just an opportunity to share and learn. Your comments will not be shared with your children or teachers and there will not be any consequences for you or your children from the feedback you share.

We will be taking notes so we don't miss anything. We will not record any names in our notes, and we will not link your name with your responses in our report.

If you agree, we would like to record today's session so we can catch all the details of our discussion. It's not required, and you can still participate even if you don't want to be recorded.

Do you have any questions?

Do you consent to being recorded today? (Interview can continue with note-taking even if they do not consent to recording.)

First, I would like to learn more about you and your family.

1. Tell us about your household. Who lives with you in your home? Who are the children and how old are they?
2. What is your race or ethnicity? (primary participating parent/guardian) (*Record for primary participant in interview. If more than one participating, capture this info for both. This does not necessarily define primary caregiver of child/children in household*)
 - a. American Indian or Alaska Native
 - b. Asian or Pacific Islander
 - c. Black or African American
 - d. Hispanic or Latino/a
 - e. White or Caucasian
 - f. Two or more races
 - g. Other: _____
 - h. Prefer not to answer

3. What is the primary language spoken in your home?
4.

Who cares for the children in your household in the daytime?
5. Who cares for the children in your household in the evenings and weekends?

I'd like to learn more about how you make decisions about child care for your family.

1. Do you work?
 - a. If yes:
 - i. What is the nature of your work?
 - ii. Approximately how many hours do you work per week? (Probe: Is this a regular weekly schedule? Time of day/night or shift work? Also ask about commute time/challenges)
 - iii. Who cares for your child while you're working?
 - iv. How did you choose these child care arrangements? What mattered to you most in your decision making?
 - b. If no:
 - i. Are you the primary caregiver for your child during the daytime? If so, what kind of community supports do you find helpful? Why? Are there other kinds of supports that you think would be helpful to you?
2. How did you begin your search for child care? Where did you get information?
3. Did you feel that you were able to find the information you needed? If not, what kinds of information did you wish was available to you?

Prompt for those who decided to use FFN or other informal care: What factors led you to choose your child care arrangement versus a child care center, preschool or child care in a licensed home?

Prompt for those who speak a language other than English: Were you able to find the translated materials and information you felt you needed to make an informed choice about child care?
4. What does great child care look like to you and your family? How do you measure that as a parent?

Alternative wording:
How do you as a parent think about a quality program or service for your child? What aspects of the program/service tell you it's a quality program or the right program for your family?

Next, I'd like to ask about some challenges that families sometimes have in getting care.

1. What do you like most about your child care situation?
2. What, if anything, would you change about your child care situation if you could?
3. What barriers or challenges do you face in finding child care for your family's needs?
4. Are there any particular types of care that your family is having challenges in finding, (e.g., dual language, special needs, non-traditional hours, afterschool, infant care, full-day, accessing pre-K, language- or culture-specific, etc.)?
 - a. ***Prompt if applicable,*** Are there any special services you are aware of but prefer not to participate in? Why did you decide not to participate in this service?

Now, I'd like to ask about the cost of child care.

5. How do you feel about the cost of the care you are using?
6. How does the cost of care affect your choices about child care?
7. Does your family receive child care assistance to help with the cost of care? What are some of the challenges in using this voucher?
Prompt if they say they don't want to bother, or used to receive but no longer: Why did you decide to stop receiving child care assistance? What would make it easier for you to take advantage of the child care assistance program?

Next, I'd like to ask about how child care affects your work.

8. How has your child care situation affected your work situation (whether or how much to work, missing work, etc.) *probe for details such as cost, location, type of program, transportation, stability/reliability, etc. Can also include choices about completing education or training.*

Last, I have a wrap-up question.

9. What do you think is the biggest challenge for a family like yours in finding child care that meets your needs?

We have come to the end of our discussion. Is there anything else you would like to add?

Thank you for taking the time to talk with us today and sharing your thoughts on this important issue!

Appendix D. State Employee Child Care Survey

We appreciate you taking the time to share your experiences with us. This survey will help us learn more about child care access and affordability. Your responses will help us make decisions and dedicate resources so children and families in Washington can access safe, enriching child care.

This survey is voluntary and will take about 15 minutes. It is for parents of children 12 years or younger. **If you do not have children 12 years or younger, you do not need to take this survey.** Questions that are required for progression are marked with an asterisk.

This survey is conducted by the Office of Financial Management State Human Resources. Summary results will be included in a report released by the Department of Commerce in July 2020 [link to RCW]. We will release only summary data. [link to data security protocol]

For questions, please contact Hayley Hohman at Hayley.hohman@ofm.wa.gov or call 360-790-3007.

* 1. Are you currently an employee of a Washington state executive branch agency?

- Yes
 No

* 2. Do you have children aged 12 years or younger?

- Yes
 No

Basic Information

3. Are you employed:

- Full time (35 or more hours/week)
 Part time (under 35 hours/week)

4. How many children aged 12 and under do you have?

Under 1 year

1 year–17 months

18–29 months

30 months–5 years, not attending kindergarten or school

5–12 years, attending kindergarten or school

Type of Care

5. Please indicate the number of children in each type of care (multiple types allowed).

Licensed or certified child care centers	<input type="text"/>
Licensed family home	<input type="text"/>
ECEAP or Head Start	<input type="text"/>
License-exempt providers (4 hours or less per day)	<input type="text"/>
Paid family, friend, or neighbor caregiver	<input type="text"/>
Unpaid relative, stay-at-home partner, friend or neighbor	<input type="text"/>
Paid relative	<input type="text"/>
Nannies and au pairs	<input type="text"/>
Religious organizations providing care	<input type="text"/>
Entities providing before- and after-school care	<input type="text"/>
Employer-supported child care	<input type="text"/>
Infants at work	<input type="text"/>
Summer camps or care	<input type="text"/>
None, I do not use child care	<input type="text"/>
Other	<input type="text"/>

6. If you use another type of child care, please specify.

7. When do you use formal or informal child care?

- | | |
|--|---|
| <input type="radio"/> Year-round | <input type="radio"/> Sick and ad hoc care |
| <input type="radio"/> Summer only | <input type="radio"/> Intermittent |
| <input type="radio"/> School year only | <input type="radio"/> I do not use child care |
| <input type="radio"/> Other (please specify) | |

Child Care Costs

8. About how much do you pay in a typical month for child care (for all children)?

9. How do you pay for child care? Please enter number of children for each applicable payment type.

100% out of pocket
(private pay)

State subsidy (Working
Connections Child Care,
Seasonal Child Care, etc.)

Other subsidy or
scholarship

Financial assistance from
friends or family

Financial assistance from
employer

Child Care Access

10. What do you look for in a child care program? Check all that apply.

- Educational activities
- Positive child and youth development
- Learn and play
- Activities to keep child busy
- Physical activity
- Arts and crafts
- Homework help
- I have not looked for child care
- Other (please specify)

11. Please describe the challenges you face in accessing or paying for child care. Include any challenges accessing care that meets your child or families' specific needs or preferences.

12. Overall, how has it been to find and keep child care?

- | | |
|--|---|
| <input type="radio"/> Very easy | <input type="radio"/> Very difficult |
| <input type="radio"/> Easy | <input type="radio"/> I have not looked for child care, N/A |
| <input type="radio"/> Neither easy nor difficult | <input type="radio"/> Decline to answer |
| <input type="radio"/> Difficult | |

13. Over the past six months, how many total days have you missed work due to issues concerning child care?

- 0
- 1-2
- 3-5
- 5+

14. Over the past six months, how many total days have you arrived late to or left early from work due to issues concerning child care?

- 0
- 1-2
- 3-5
- 5+

15. Has this happened to you due to issues accessing child care? Check all that apply.

- | | |
|--|--|
| <input type="checkbox"/> Left a job | <input type="checkbox"/> Teleworked |
| <input type="checkbox"/> Reduced from full time to part time | <input type="checkbox"/> Used a flexible work schedule (compressed work week, nonstandard hours, etc.) |
| <input type="checkbox"/> Turned down a job or promotion | |

Appendix E. Supply and Demand Methodology

The distance-based approach to measuring child care supply and adjusting for nearby demand was introduced in an article published by the academic journal *Early Childhood Research Quarterly* (Family-Centered Measures of Access to Early Care and Education” by Elizabeth E. Davis, Won Fy Lee, and Aaron J. Sojourner). The authors, economists at the University of Minnesota, developed the methodology by adapting techniques from the field of geography in order to study the distribution of access to child care in Minnesota. The advantage of this approach is that it eliminates most of the limitations of the area-based measure that has commonly been used in child care research literature. Despite the popularity of area-based measures in the child care literature, the key limitation of these measures stems from the fact that the unit of analysis is based on administrative or political boundaries that are arbitrarily defined from the perspective of families deciding on child care for their children. Area-based measures of access to ECE supply typically measure access by area using the area’s ratio of the total number of slots divided by the total number of children or ratio of children to child care workers. The potential for information loss and statistical bias when using area-based measures is known as a modifiable areal unit problem (MAUP) and has been a longstanding concern in geography.

This newer approach is referred to in the original journal article as an *enhanced two-stage floating catchment area method*. In this report it is simply referred to as the *distance-based approach* to measuring child care supply. The distance-based approach differs from an area-based analysis in that it is family-centered and assumes families are interested in nearby providers whether or not they are located in the same area. The E2SFCA method measures the supply of slots within a family-specific catchment area and adjusts each nearby provider’s capacity based on the number of young children nearby that provider who might compete for the provider’s slots. The two stages refer to the two catchment areas: first one for the provider and then another for the family.

To construct distance-based measures of families’ access to child care, the ideal dataset would have exact residential locations of all families with young children as well as information on their socio-economic characteristics. Of course, exact locations, income, and race of actual families with children under age 5 are not publicly available. This approach approximates the spatial distribution of families’ residential locations and their demographic characteristics by combining information from the Census American Community Survey (ACS) 2014-2018 five-year estimates (2018 ACS) and the 2010 decennial Census. The 2018 ACS provides recent estimates of the number of families with any child under age 5 by census block group. To get more exact geographic information about where families with young children live, the model incorporates block-level data from the 2010 decennial census. Census blocks cover much smaller areas than Census block groups or tracts (see Table 2). The likelihood of a synthetic family location being in a particular Census block is proportional to the estimated likelihood that a real family with children under age 5 lives in that block. The exact location of any synthetic family within a block is random assuming a uniform distribution of families within the block boundaries.

Impossible residential locations are restricted for synthetic families to exclude lakes, rivers and state parks. These locations are generated in ArcGIS using the Geospatial Modelling

Environment add-on tool, ultimately producing a geocoded dataset of synthetic family points that have race and income status assigned to them probabilistically.

The ACS estimates that 336,880 families with children under age 5 lived in Washington in 2018. With about 6,000 ECE providers, the number of provider-family location pairs is extremely large, approximately 2 billion pairs. For computational ease, this approach draws a set of synthetic family locations numbering one quarter of the total number of Washington families (N=84,220 synthetic family locations), so each location represents four families. The 84,220 family locations are randomly drawn based on the estimated number of families with young children living in each Census block. For each family, the number of children under 5 is imputed to equal the block group's average number of young children per family with any young children. Ultimately, each synthetic family location has an associated number of young children equal to four times the block-level average and a joint probability distribution over race and income level.

Travel time between each synthetic-family location and any ECE provider is estimated using **osrmtime**, a Stata command that calculates driving time between two geocoded points. When computing travel time, the algorithm locates the nearest point on the road network and travel times are computed from that point. This functionally excludes locations off the road network and ensures the assignment of synthetic families to random habitable locations within a block. For each synthetic family location, the travel time to each provider within 20 minutes driving time is calculated.

In stage one of the two-stage calculation, a weighted capacity-to-population ratio is generated for every licensed child care provider. For each provider, the model finds all families within the 20-minute drive-time catchment area around the provider's location. The sum of children in these nearby families serves as a proxy for the strength of potential demand for the provider's capacity. However, since children closer to a provider are more relevant to provider demand, children that are farther away are discounted using a Gaussian distance decay function. Finally, the capacity of each provider is divided by the sum of the distance discounted child population to obtain a capacity-to-nearby child population ratio for every provider. Ultimately, two providers with the same capacity will have different capacity-to-population ratios if one has more young children close by. This measure captures the notion that a provider's slots will be less accessible to any nearby family if more children are closer to the provider competing for a spot.

Stage two of the methodology determines the quantity of local child care supply for each synthetic family location, based on the total capacity of nearby providers adjusting for their nearby young-child population. This is accomplished by identifying all providers within the 20-minute catchment area and computing each one's slots-to-population ratio, discounting for travel time using the same distance-decay function as was used for the capacity-to-population ratio. Summing these across the providers near each synthetic family yields the family's measure of access to child care supply. This may be referred to as *nearby supply adjusted for nearby population* or simply *adjusted supply*. It increases if the family has more slots nearer by and decreases if more young children are nearer by those slots. It is similar in spirit to the area-based measure; however, it is family-centered and distance-based.

While this study provides new distance-based measures of access to Washington's licensed supply of child care, there are a number of limitations and directions for future research. An important limitation is that this research does not use data on actual residential locations of

families who are seeking or using child care; therefore, there is the measurement error in the locations and travel times. In addition, this analysis assumes travel from home to child care by car and is not able to incorporate travel between work location and child care or by other modes of transportation. The provider data do not have direct observational measures of quality, rather it uses Washington State's quality rating system as an indicator of quality. The access measures contained in this report and the accompanying Tableau workbook are a substantial improvement over current measures, but they cannot account for the availability of openings at the nearest provider, nor account for family preferences with regards to care provided by relatives, or specific language or cultural preferences. Despite these limitations, the access measures provide new insights into the supply and demand of early care and learning opportunities for families of different income levels and sociodemographic groups.

Appendix F. Supply and Demand Detail Tables

Figure F.1. Percent of Demand Met by Nearby Supply

County	Percent of Demand Met by Nearby Supply
Adams	37%
Asotin	64%
Benton	28%
Chelan	41%
Clallam	40%
Clark	34%
Columbia	27%
Cowlitz	39%
Douglas	48%
Ferry	24%
Franklin	34%
Garfield	18%
Grant	47%
Grays Harbor	41%
Island	27%
Jefferson	22%
King	51%
Kitsap	29%
Kittitas	38%
Klickitat	39%
Lewis	38%
Lincoln	25%
Mason	40%
Okanogan	55%
Pacific	46%
Pend Oreille	46%
Pierce	31%
San Juan	86%
Skagit	35%
Skamania	64%
Snohomish	35%
Spokane	42%
Stevens	34%
Thurston	38%
Wahkiakum	54%
Walla Walla	46%
Whatcom	31%
Whitman	65%
Yakima	49%

Table F.2. Drive Time to Different Child Care Options within 10 Minutes

County	Number of Families	High Quality Provider*	Accepts Subsidy	Offers Head Start	Offers ECEAP	Cares for Infants
Adams	1,364	71%	78%	71%	86%	79%
Asotin	688	95%	97%	97%	97%	97%
Benton	10,232	59%	97%	93%	88%	98%
Chelan	2,992	63%	91%	71%	82%	91%
Clallam	2,636	46%	90%	70%	55%	88%
Clark	21,236	86%	97%	92%	93%	97%
Columbia	96	0%	79%	0%	79%	79%
Cowlitz	4,608	70%	88%	83%	79%	84%
Douglas	2,084	73%	95%	83%	85%	96%
Ferry	232	0%	40%	17%	64%	36%
Franklin	5,096	92%	88%	87%	94%	93%
Garfield	100	0%	76%	0%	0%	0%
Grant	5,360	67%	77%	77%	73%	86%
Grays Harbor	2,512	53%	84%	49%	89%	83%
Island	3,628	67%	76%	62%	72%	69%
Jefferson	716	0%	77%	28%	0%	78%
King	100,344	83%	99%	87%	88%	99%
Kitsap	11,884	58%	93%	86%	79%	97%
Kittitas	1,828	0%	71%	73%	15%	85%
Klickitat	696	46%	24%	46%	54%	27%
Lewis	3,228	0%	72%	58%	68%	77%
Lincoln	348	0%	0%	0%	45%	55%
Mason	2,228	38%	62%	37%	54%	69%
Okanogan	1,964	48%	52%	79%	62%	86%
Pacific	632	61%	72%	20%	71%	84%
Pend Oreille	440	10%	11%	35%	10%	44%
Pierce	41,536	60%	97%	76%	95%	98%
San Juan	468	30%	30%	44%	31%	21%
Skagit	5,800	68%	91%	88%	81%	92%
Skamania	352	2%	47%	44%	45%	55%
Snohomish	36,360	50%	95%	74%	89%	97%
Spokane	23,028	86%	96%	77%	91%	96%
Stevens	1,528	2%	45%	31%	31%	44%
Thurston	13,144	80%	92%	85%	57%	95%
Wahkiakum	156	46%	46%	0%	46%	0%
Walla Walla	2,380	85%	88%	84%	91%	88%
Whatcom	8,460	59%	87%	80%	64%	90%
Whitman	1,248	69%	73%	62%	81%	80%
Yakima	14,944	86%	94%	90%	91%	96%

Table F.3. Drive Time to Different Child Care Options within 20 Minutes

County	Number of Families	High Quality Provider*	Accepts Subsidy	Offers Head Start	Offers ECEAP	Cares for Infants
Adams	1,364	85%	85%	84%	99%	87%
Asotin	688	100%	100%	100%	100%	100%
Benton	10,232	97%	100%	99%	99%	100%
Chelan	2,992	78%	99%	91%	96%	99%
Clallam	2,636	62%	99%	87%	71%	99%
Clark	21,236	98%	100%	100%	99%	100%
Columbia	96	0%	96%	0%	96%	100%
Cowlitz	4,608	89%	98%	97%	95%	99%
Douglas	2,084	84%	100%	87%	99%	100%
Ferry	232	0%	76%	34%	100%	71%
Franklin	5,096	98%	98%	93%	99%	99%
Garfield	100	0%	100%	0%	0%	0%
Grant	5,360	91%	99%	96%	93%	100%
Grays Harbor	2,512	65%	95%	60%	98%	97%
Island	3,628	82%	100%	73%	95%	95%
Jefferson	716	0%	93%	97%	0%	97%
King	100,344	100%	100%	98%	100%	100%
Kitsap	11,884	94%	99%	99%	98%	100%
Kittitas	1,828	0%	81%	93%	18%	99%
Klickitat	696	71%	36%	80%	91%	46%
Lewis	3,228	46%	92%	86%	89%	97%
Lincoln	348	8%	10%	0%	63%	86%
Mason	2,228	60%	100%	73%	78%	100%
Okanogan	1,964	64%	98%	96%	82%	100%
Pacific	632	87%	84%	35%	90%	99%
Pend Oreille	440	20%	34%	46%	23%	71%
Pierce	41,536	97%	99%	96%	100%	99%
San Juan	468	36%	36%	64%	42%	39%
Skagit	5,800	83%	99%	99%	96%	100%
Skamania	352	16%	95%	81%	95%	99%
Snohomish	36,360	93%	100%	99%	99%	100%
Spokane	23,028	97%	100%	93%	99%	100%
Stevens	1,528	19%	83%	59%	66%	90%
Thurston	13,144	96%	100%	97%	98%	100%
Wahkiakum	156	67%	67%	0%	67%	0%
Walla Walla	2,380	90%	94%	90%	97%	96%
Whatcom	8,460	85%	98%	96%	93%	100%
Whitman	1,248	79%	88%	70%	95%	94%
Yakima	14,944	97%	100%	99%	99%	100%

Table F.4. Median Child Care Prices and Median Family Incomes for Two-Parent Families

County	Infant: Center	Toddler: Center	Preschool: Center	Infant: Family Child Care	Toddler: Family Child Care	Preschool: Family Child Care	Two- Parent Income
Adams	\$792.00	\$742.50	\$685.00	\$770.00	\$660.00	\$616.00	\$64,257
Asotin	\$792.00	\$742.50	\$685.00	\$770.00	\$660.00	\$616.00	\$66,667
Benton	\$885.00	\$715.00	\$700.00	\$770.00	\$704.00	\$660.00	\$77,580
Chelan	\$792.00	\$742.50	\$685.00	\$770.00	\$660.00	\$616.00	\$71,722
Clallam	\$1,075.00	\$920.00	\$812.00	\$800.00	\$735.00	\$675.00	\$62,893
Clark	\$1,075.00	\$920.00	\$812.00	\$800.00	\$735.00	\$675.00	\$82,269
Columbia	\$885.00	\$715.00	\$700.00	\$770.00	\$704.00	\$660.00	\$68,182
Cowlitz	\$1,075.00	\$920.00	\$812.00	\$800.00	\$735.00	\$675.00	\$81,184
Douglas	\$792.00	\$742.50	\$685.00	\$770.00	\$660.00	\$616.00	\$60,754
Ferry	\$792.00	\$742.50	\$685.00	\$770.00	\$660.00	\$616.00	\$77,821
Franklin	\$885.00	\$715.00	\$700.00	\$770.00	\$704.00	\$660.00	\$78,794
Garfield	\$792.00	\$742.50	\$685.00	\$770.00	\$660.00	\$616.00	\$76,079
Grant	\$792.00	\$742.50	\$685.00	\$770.00	\$660.00	\$616.00	\$76,591
Grays Harbor	\$1,075.00	\$920.00	\$812.00	\$800.00	\$735.00	\$675.00	\$64,832
Island	\$1,363.00	\$1,138.50	\$967.50	\$990.00	\$900.00	\$880.00	\$90,617
Jefferson	\$1,075.00	\$920.00	\$812.00	\$800.00	\$735.00	\$675.00	\$63,646
King	\$1,580.16	\$1,388.90	\$1,262.00	\$1,210.00	\$1,109.24	\$1,000.00	\$73,572
Kitsap	\$1,109.40	\$993.30	\$834.20	\$900.00	\$800.00	\$750.00	\$84,798
Kittitas	\$885.00	\$715.00	\$700.00	\$770.00	\$704.00	\$660.00	\$77,112
Klickitat	\$1,075.00	\$920.00	\$812.00	\$800.00	\$735.00	\$675.00	\$80,833
Lewis	\$1,075.00	\$920.00	\$812.00	\$800.00	\$735.00	\$675.00	\$83,306
Lincoln	\$792.00	\$742.50	\$685.00	\$770.00	\$660.00	\$616.00	\$112,307
Mason	\$1,075.00	\$920.00	\$812.00	\$800.00	\$735.00	\$675.00	\$93,497
Okanogan	\$792.00	\$742.50	\$685.00	\$770.00	\$660.00	\$616.00	\$139,936
Pacific	\$1,075.00	\$920.00	\$812.00	\$800.00	\$735.00	\$675.00	\$97,343
Pend Oreille	\$792.00	\$742.50	\$685.00	\$770.00	\$660.00	\$616.00	\$92,290
Pierce	\$1,109.40	\$993.30	\$834.20	\$900.00	\$800.00	\$750.00	\$83,908
San Juan	\$1,363.00	\$1,138.50	\$967.50	\$990.00	\$900.00	\$880.00	\$96,777
Skagit	\$1,363.00	\$1,138.50	\$967.50	\$990.00	\$900.00	\$880.00	\$87,747
Skamania	\$1,075.00	\$920.00	\$812.00	\$800.00	\$735.00	\$675.00	\$67,726
Snohomish	\$1,363.00	\$1,138.50	\$967.50	\$990.00	\$900.00	\$880.00	\$73,507
Spokane	\$1,052.00	\$885.00	\$815.00	\$770.00	\$660.00	\$660.00	\$85,269
Stevens	\$792.00	\$742.50	\$685.00	\$770.00	\$660.00	\$616.00	\$71,837
Thurston	\$1,075.00	\$920.00	\$812.00	\$800.00	\$735.00	\$675.00	\$72,099
Wahkiakum	\$1,075.00	\$920.00	\$812.00	\$800.00	\$735.00	\$675.00	\$75,417
Walla Walla	\$792.00	\$742.50	\$685.00	\$770.00	\$660.00	\$616.00	\$87,344
Whatcom	\$1,363.00	\$1,138.50	\$967.50	\$990.00	\$900.00	\$880.00	\$92,351
Whitman	\$792.00	\$742.50	\$685.00	\$770.00	\$660.00	\$616.00	\$78,438
Yakima	\$792.00	\$742.50	\$685.00	\$770.00	\$660.00	\$616.00	\$86,739

Table F.5. Median Child Care Prices and Median Family Incomes for Single Mother

County	Infant: Center	Toddler: Center	Preschool: Center	Infant: Family Child Care	Toddler: Family Child Care	Preschool: Family Child Care	Single Mother Income
Adams	\$792.00	\$742.50	\$685.00	\$770.00	\$660.00	\$616.00	\$16,523
Asotin	\$792.00	\$742.50	\$685.00	\$770.00	\$660.00	\$616.00	\$32,583
Benton	\$885.00	\$715.00	\$700.00	\$770.00	\$704.00	\$660.00	\$32,875
Chelan	\$792.00	\$742.50	\$685.00	\$770.00	\$660.00	\$616.00	\$25,750
Clallam	\$1,075.00	\$920.00	\$812.00	\$800.00	\$735.00	\$675.00	\$24,531
Clark	\$1,075.00	\$920.00	\$812.00	\$800.00	\$735.00	\$675.00	\$23,333
Columbia	\$885.00	\$715.00	\$700.00	\$770.00	\$704.00	\$660.00	\$22,500
Cowlitz	\$1,075.00	\$920.00	\$812.00	\$800.00	\$735.00	\$675.00	\$23,750
Douglas	\$792.00	\$742.50	\$685.00	\$770.00	\$660.00	\$616.00	\$21,380
Ferry	\$792.00	\$742.50	\$685.00	\$770.00	\$660.00	\$616.00	\$30,606
Franklin	\$885.00	\$715.00	\$700.00	\$770.00	\$704.00	\$660.00	\$19,830
Garfield	\$792.00	\$742.50	\$685.00	\$770.00	\$660.00	\$616.00	\$26,379
Grant	\$792.00	\$742.50	\$685.00	\$770.00	\$660.00	\$616.00	\$28,038
Grays Harbor	\$1,075.00	\$920.00	\$812.00	\$800.00	\$735.00	\$675.00	\$21,879
Island	\$1,363.00	\$1,138.50	\$967.50	\$990.00	\$900.00	\$880.00	\$28,157
Jefferson	\$1,075.00	\$920.00	\$812.00	\$800.00	\$735.00	\$675.00	\$62,738
King	\$1,580.16	\$1,388.90	\$1,262.00	\$1,210.00	\$1,109.24	\$1,000.00	\$25,221
Kitsap	\$1,109.40	\$993.30	\$834.20	\$900.00	\$800.00	\$750.00	\$37,946
Kittitas	\$885.00	\$715.00	\$700.00	\$770.00	\$704.00	\$660.00	\$18,400
Klickitat	\$1,075.00	\$920.00	\$812.00	\$800.00	\$735.00	\$675.00	\$25,260
Lewis	\$1,075.00	\$920.00	\$812.00	\$800.00	\$735.00	\$675.00	\$28,514
Lincoln	\$792.00	\$742.50	\$685.00	\$770.00	\$660.00	\$616.00	\$36,281
Mason	\$1,075.00	\$920.00	\$812.00	\$800.00	\$735.00	\$675.00	\$29,023
Okanogan	\$792.00	\$742.50	\$685.00	\$770.00	\$660.00	\$616.00	\$40,200
Pacific	\$1,075.00	\$920.00	\$812.00	\$800.00	\$735.00	\$675.00	\$29,804
Pend Oreille	\$792.00	\$742.50	\$685.00	\$770.00	\$660.00	\$616.00	\$31,792
Pierce	\$1,109.40	\$993.30	\$834.20	\$900.00	\$800.00	\$750.00	\$21,971
San Juan	\$1,363.00	\$1,138.50	\$967.50	\$990.00	\$900.00	\$880.00	\$33,866
Skagit	\$1,363.00	\$1,138.50	\$967.50	\$990.00	\$900.00	\$880.00	\$20,094
Skamania	\$1,075.00	\$920.00	\$812.00	\$800.00	\$735.00	\$675.00	\$21,187
Snohomish	\$1,363.00	\$1,138.50	\$967.50	\$990.00	\$900.00	\$880.00	\$26,327
Spokane	\$1,052.00	\$885.00	\$815.00	\$770.00	\$660.00	\$660.00	\$20,250
Stevens	\$792.00	\$742.50	\$685.00	\$770.00	\$660.00	\$616.00	\$23,209
Thurston	\$1,075.00	\$920.00	\$812.00	\$800.00	\$735.00	\$675.00	\$20,593
Wahkiakum	\$1,075.00	\$920.00	\$812.00	\$800.00	\$735.00	\$675.00	\$20,515
Walla Walla	\$792.00	\$742.50	\$685.00	\$770.00	\$660.00	\$616.00	\$18,889
Whatcom	\$1,363.00	\$1,138.50	\$967.50	\$990.00	\$900.00	\$880.00	\$32,143
Whitman	\$792.00	\$742.50	\$685.00	\$770.00	\$660.00	\$616.00	\$26,250
Yakima	\$792.00	\$742.50	\$685.00	\$770.00	\$660.00	\$616.00	\$29,222

Table F.6. Percent of Children in Elementary School Compared to School-Age Capacity

District Name	Providers	School-Based Licensed Capacity	Elementary School Enrollment	Capacity as Percent of Enrollment
ANACORTES SCHOOL DISTRICT	1	45	1,240	3.6%
AUBURN SCHOOL DISTRICT	6	270	7,900	3.4%
BAINBRIDGE ISLAND SCHOOL DISTRICT	1	99	1,456	6.8%
BELLEVUE SCHOOL DISTRICT	3	109	8,972	1.2%
BELLINGHAM SCHOOL DISTRICT	20	781	5,247	14.9%
BETHEL SCHOOL DISTRICT	17	1,118	9,422	11.9%
BREMERTON SCHOOL DISTRICT	3	217	2,341	9.3%
BURLINGTON-EDISON SCHOOL DISTRICT	3	90	1,553	5.8%
CAMAS SCHOOL DISTRICT	1	50	3,113	1.6%
CENTRAL KITSAP SCHOOL DISTRICT	13	830	5,224	15.9%
CENTRAL VALLEY SCHOOL DISTRICT	2	90	6,646	1.4%
CHEHALIS SCHOOL DISTRICT	1	29	1,343	2.2%
CLARKSTON SCHOOL DISTRICT	1	60	1,109	5.4%
CLOVER PARK SCHOOL DISTRICT	6	484	6,981	6.9%
COLLEGE PLACE SCHOOL DISTRICT	1	45	701	6.4%
DIERINGER SCHOOL DISTRICT	2	135	979	13.8%
EAST VALLEY SCHOOL DISTRICT (SPOKANE)	3	255	1,837	13.9%
EAST VALLEY SCHOOL DISTRICT (YAKIMA)	1	45	1,522	3.0%
EASTMONT SCHOOL DISTRICT	2	235	2,700	8.7%
EDMONDS SCHOOL DISTRICT	25	1,432	9,496	15.1%
ELLENSBURG SCHOOL DISTRICT	2	81	1,545	5.2%
ENUMCLAW SCHOOL DISTRICT	3	112	1,930	5.8%
EVERETT SCHOOL DISTRICT	10	500	9,862	5.1%
EVERGREEN SCHOOL DISTRICT (CLARK)	18	735	10,779	6.8%
FEDERAL WAY SCHOOL DISTRICT	21	826	9,978	8.3%
FERNDALE SCHOOL DISTRICT	3	80	2,116	3.8%
FIFE SCHOOL DISTRICT	3	126	1,754	7.2%
FRANKLIN PIERCE SCHOOL DISTRICT	5	370	3,616	10.2%
GOLDENDALE SCHOOL DISTRICT	1	12	403	3.0%
GRIFFIN SCHOOL DISTRICT	1	40	408	9.8%
HIGHLINE SCHOOL DISTRICT	8	531	8,574	6.2%
ISSAQUAH SCHOOL DISTRICT	4	118	9,520	1.2%
KENNEWICK SCHOOL DISTRICT	14	880	8,695	10.1%
KENT SCHOOL DISTRICT	10	487	12,258	4.0%
LAKE STEVENS SCHOOL DISTRICT	2	90	4,399	2.0%
LAKE WASHINGTON SCHOOL DISTRICT	14	481	15,359	3.1%
LAKESWOOD SCHOOL DISTRICT	2	53	1,095	4.8%
MARYSVILLE SCHOOL DISTRICT	4	238	4,842	4.9%
MEAD SCHOOL DISTRICT	7	265	4,419	6.0%
MEDICAL LAKE SCHOOL DISTRICT	1	160	902	17.7%

District Name	Providers	School-Based Licensed Capacity	Elementary School Enrollment	Capacity as Percent of Enrollment
MERCER ISLAND SCHOOL DISTRICT	5	244	1,741	14.0%
MERIDIAN SCHOOL DISTRICT	1	30	891	3.4%
MONROE SCHOOL DISTRICT	4	257	2,807	9.2%
MOUNT VERNON SCHOOL DISTRICT	3	68	3,024	2.2%
MUKILTEO SCHOOL DISTRICT	6	355	7,104	5.0%
NOOKSACK VALLEY SCHOOL DISTRICT	2	38	1,005	3.8%
NORTH KITSAP SCHOOL DISTRICT	8	380	2,715	14.0%
NORTH THURSTON PUBLIC SCHOOLS	11	532	7,213	7.4%
NORTHSHORE SCHOOL DISTRICT	22	1,245	10,849	11.5%
OAK HARBOR SCHOOL DISTRICT	4	364	2,927	12.4%
OLYMPIA SCHOOL DISTRICT	13	696	4,381	15.9%
ORTING SCHOOL DISTRICT	1	30	1,222	2.5%
PASCO SCHOOL DISTRICT	7	495	8,724	5.7%
PENINSULA SCHOOL DISTRICT	7	380	4,031	9.4%
PORT ANGELES SCHOOL DISTRICT	2	105	1,672	6.3%
PORT TOWNSEND SCHOOL DISTRICT	1	75	503	14.9%
PROSSER SCHOOL DISTRICT	1	22	1,124	2.0%
PUYALLUP SCHOOL DISTRICT	22	1,572	10,669	14.7%
RENTON SCHOOL DISTRICT	16	1,168	7,462	15.7%
RICHLAND SCHOOL DISTRICT	11	675	6,175	10.9%
RIDGEFIELD SCHOOL DISTRICT	1	60	1,640	3.7%
RIVERSIDE SCHOOL DISTRICT	1	30	628	4.8%
SEATTLE PUBLIC SCHOOLS	70	5,529	27,210	20.3%
SEDRO-WOOLLEY SCHOOL DISTRICT	2	60	2,107	2.8%
SHELTON SCHOOL DISTRICT	1	20	1,854	1.1%
SHORELINE SCHOOL DISTRICT	1	18	4,383	0.4%
SNOHOMISH SCHOOL DISTRICT	3	192	4,037	4.8%
SNOQUALMIE VALLEY SCHOOL DISTRICT	1	60	3,431	1.7%
SOUTH KITSAP SCHOOL DISTRICT	6	245	4,558	5.4%
SOUTH WHIDBEY SCHOOL DISTRICT	1	19	536	3.5%
SPOKANE SCHOOL DISTRICT	19	1,217	14,870	8.2%
STANWOOD-CAMANO SCHOOL DISTRICT	2	81	2,199	3.7%
STEILACOOM HIST. SCHOOL DISTRICT	2	100	1,496	6.7%
SULTAN SCHOOL DISTRICT	1	40	884	4.5%
TACOMA SCHOOL DISTRICT	17	950	13,477	7.0%
TUMWATER SCHOOL DISTRICT	6	330	2,788	11.8%
UNIVERSITY PLACE SCHOOL DISTRICT	6	434	2,512	17.3%
VANCOUVER SCHOOL DISTRICT	5	220	10,557	2.1%
VASHON ISLAND SCHOOL DISTRICT	1	45	553	8.1%
WAHLUKE SCHOOL DISTRICT	1	40	1,131	3.5%
WALLA WALLA PUBLIC SCHOOLS	6	195	2,470	7.9%
WASHOUGAL SCHOOL DISTRICT	1	30	1,345	2.2%

District Name	Providers	School-Based Licensed Capacity	Elementary School Enrollment	Capacity as Percent of Enrollment
WENATCHEE SCHOOL DISTRICT	3	160	3,362	4.8%
WEST VALLEY SCHOOL DISTRICT (SPOKANE)	2	65	1,346	4.8%
WEST VALLEY SCHOOL DISTRICT (YAKIMA)	6	257	2,387	10.8%
WHITE RIVER SCHOOL DISTRICT	1	30	1,894	1.6%
WOODLAND SCHOOL DISTRICT	2	163	1,126	14.5%
YAKIMA SCHOOL DISTRICT	4	235	7,248	3.2%
YELM SCHOOL DISTRICT	1	35	2,603	1.3%

Table F.7. Median School-Age Prices and Median Family Incomes for Two-Parent Families

County	Weekly Full-Time Price: Center	Weekly Full-Time Price: Family Child Care	Percent of Income Spent for 16 Weeks: Center	Percent of Income Spent for 16 Weeks: Family Child Care	Two-Parent Income
Adams	\$663.30	\$550.00	4%	3%	\$64,257
Asotin	\$663.30	\$550.00	4%	3%	\$66,667
Benton	\$663.30	\$550.00	3%	3%	\$77,580
Chelan	\$663.30	\$550.00	3%	3%	\$71,722
Clallam	\$663.30	\$550.00	4%	3%	\$62,893
Clark	\$663.30	\$550.00	3%	2%	\$82,269
Columbia	\$663.30	\$550.00	4%	3%	\$68,182
Cowlitz	\$663.30	\$550.00	3%	2%	\$81,184
Douglas	\$663.30	\$550.00	4%	3%	\$60,754
Ferry	\$663.30	\$550.00	3%	3%	\$77,821
Franklin	\$663.30	\$550.00	3%	3%	\$78,794
Garfield	\$663.30	\$550.00	3%	3%	\$76,079
Grant	\$663.30	\$550.00	3%	3%	\$76,591
Grays Harbor	\$663.30	\$550.00	4%	3%	\$64,832
Island	\$451.00	\$616.00	2%	2%	\$90,617
Jefferson	\$451.00	\$616.00	3%	3%	\$63,646
King	\$451.00	\$616.00	2%	3%	\$73,572
Kitsap	\$451.00	\$616.00	2%	3%	\$84,798
Kittitas	\$705.00	\$688.00	3%	3%	\$77,112
Klickitat	\$705.00	\$688.00	3%	3%	\$80,833
Lewis	\$705.00	\$688.00	3%	3%	\$83,306
Lincoln	\$705.00	\$688.00	2%	2%	\$112,307
Mason	\$705.00	\$688.00	3%	3%	\$93,497
Okanogan	\$645.00	\$710.82	2%	2%	\$139,936
Pacific	\$500.00	\$660.00	2%	2%	\$97,343
Pend Oreille	\$500.00	\$660.00	2%	3%	\$92,290
Pierce	\$561.00	\$605.00	2%	3%	\$83,908
San Juan	\$561.00	\$605.00	2%	2%	\$96,777
Skagit	\$561.00	\$605.00	2%	2%	\$87,747
Skamania	\$561.00	\$605.00	3%	3%	\$67,726
Snohomish	\$561.00	\$605.00	3%	3%	\$73,507
Spokane	\$561.00	\$605.00	2%	3%	\$85,269
Stevens	\$561.00	\$605.00	3%	3%	\$71,837
Thurston	\$561.00	\$605.00	3%	3%	\$72,099
Wahkiakum	\$561.00	\$605.00	3%	3%	\$75,417
Walla Walla	\$561.00	\$605.00	2%	2%	\$87,344
Whatcom	\$561.00	\$605.00	2%	2%	\$92,351
Whitman	\$561.00	\$605.00	3%	3%	\$78,438
Yakima	\$550.00	\$660.00	2%	3%	\$86,739

Table F.8. Median School-Age Prices and Median Family Incomes for Single Mother

County	Weekly Full-Time Price: Center	Weekly Full-Time Price: Family Child Care	Percent of Income Spent for 16 Weeks: Center	Percent of Income Spent for 16 Weeks: Family Child Care	Single Mother Income
Adams	\$663.30	\$550.00	14%	12%	\$16,523
Asotin	\$663.30	\$550.00	7%	6%	\$32,583
Benton	\$663.30	\$550.00	7%	6%	\$32,875
Chelan	\$663.30	\$550.00	9%	8%	\$25,750
Clallam	\$663.30	\$550.00	10%	8%	\$24,531
Clark	\$663.30	\$550.00	10%	8%	\$23,333
Columbia	\$663.30	\$550.00	11%	9%	\$22,500
Cowlitz	\$663.30	\$550.00	10%	8%	\$23,750
Douglas	\$663.30	\$550.00	11%	9%	\$21,380
Ferry	\$663.30	\$550.00	8%	6%	\$30,606
Franklin	\$663.30	\$550.00	12%	10%	\$19,830
Garfield	\$663.30	\$550.00	9%	8%	\$26,379
Grant	\$663.30	\$550.00	9%	7%	\$28,038
Grays Harbor	\$663.30	\$550.00	11%	9%	\$21,879
Island	\$451.00	\$616.00	6%	8%	\$28,157
Jefferson	\$451.00	\$616.00	3%	4%	\$62,738
King	\$451.00	\$616.00	6%	9%	\$25,221
Kitsap	\$451.00	\$616.00	4%	6%	\$37,946
Kittitas	\$705.00	\$688.00	14%	13%	\$18,400
Klickitat	\$705.00	\$688.00	10%	10%	\$25,260
Lewis	\$705.00	\$688.00	9%	9%	\$28,514
Lincoln	\$705.00	\$688.00	7%	7%	\$36,281
Mason	\$705.00	\$688.00	9%	9%	\$29,023
Okanogan	\$645.00	\$710.82	6%	6%	\$40,200
Pacific	\$500.00	\$660.00	6%	8%	\$29,804
Pend Oreille	\$500.00	\$660.00	6%	7%	\$31,792
Pierce	\$561.00	\$605.00	9%	10%	\$21,971
San Juan	\$561.00	\$605.00	6%	6%	\$33,866
Skagit	\$561.00	\$605.00	10%	11%	\$20,094
Skamania	\$561.00	\$605.00	10%	10%	\$21,187
Snohomish	\$561.00	\$605.00	8%	8%	\$26,327
Spokane	\$561.00	\$605.00	10%	11%	\$20,250
Stevens	\$561.00	\$605.00	9%	9%	\$23,209
Thurston	\$561.00	\$605.00	10%	11%	\$20,593
Wahkiakum	\$561.00	\$605.00	10%	11%	\$20,515
Walla Walla	\$561.00	\$605.00	11%	12%	\$18,889
Whatcom	\$561.00	\$605.00	6%	7%	\$32,143
Whitman	\$561.00	\$605.00	8%	8%	\$26,250
Yakima	\$550.00	\$660.00	7%	8%	\$29,222

Table F.9. Decline in Child Care Capacity since COVID-19 Emergency Declaration, by County

Percent Decline in Child Care Capacity by County

County	Total Capacity of Programs Open in February	Total Capacity of Programs Open in June	Total Capacity Closed	Percent Decline in Capacity
Adams	505	493	12	2.38%
Asotin	534	430	104	19.48%
Benton	4,494	2,693	1,801	40.08%
Chelan	1,819	1,462	357	19.63%
Clallam	1,072	796	276	25.75%
Clark	9,368	6,765	2,603	27.79%
Columbia	30	12	18	60.00%
Cowlitz	2,317	1,410	907	39.15%
Douglas	1,019	1,019	0	0.00%
Ferry	38	38	0	0.00%
Franklin	2,804	1,709	1,095	39.05%
Garfield	24	24	0	0.00%
Grant	2,672	2,358	314	11.75%
Grays Harbor	1,305	1,026	279	21.38%
Island	1,413	1,089	324	22.93%
Jefferson	237	117	120	50.63%
King	71,659	52,538	19,121	26.68%
Kitsap	5,126	3,881	1,245	24.29%
Kittitas	713	477	236	33.10%
Klickitat	167	39	128	76.65%
Lewis	1,206	921	285	23.63%
Lincoln	50	50	0	0.00%
Mason	888	672	216	24.32%
Okanogan	704	590	114	16.19%
Pacific	251	147	104	41.43%
Pend Oreille	127	107	20	15.75%
Pierce	21,742	14,954	6,788	31.22%

Percent Decline in Child Care Capacity by County

County	Total Capacity of Programs Open in February	Total Capacity of Programs Open in June	Total Capacity Closed	Percent Decline in Capacity
San Juan	221	117	104	47.06%
Skagit	2,430	1,897	533	21.93%
Skamania	209	131	78	37.32%
Snohomish	18,384	14,325	4,059	22.08%
Spokane	12,147	9,824	2,323	19.12%
Stevens	357	317	40	11.20%
Thurston	7,264	5,338	1,926	26.51%
Wahkiakum	56	56	0	0.00%
Walla Walla	1,286	828	458	35.61%
Whatcom	3,229	1,704	1,525	47.23%
Whitman	1,058	748	310	29.30%
Yakima	7,864	4,539	3,325	42.28%

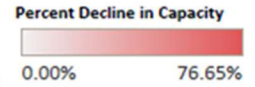


Table F.10. Decline in Child Care Capacity since COVID-19 Emergency Declaration, by ZIP Code

Percent Decline in Child Care Capacity by Zip

Zipcode	Total Capacity of Programs Open in February	Total Capacity of Programs Open in June	Total Capacity Closed	Percent Decline in Capacity	Percent Decline in Capacity
98001	815	559	256	31.41%	
98002	1,117	864	253	22.65%	
98003	1,874	1,464	410	21.88%	
98004	2,789	2,140	649	23.27%	
98005	1,422	1,000	422	29.68%	
98006	1,129	909	220	19.49%	
98007	1,962	1,490	472	24.06%	
98008	1,154	360	794	68.80%	
98010	42	30	12	28.57%	
98011	1,960	1,448	512	26.12%	
98012	1,913	1,654	259	13.54%	
98014	38	18	20	52.63%	
98019	153	153	0	0.00%	
98020	671	399	272	40.54%	
98021	1,202	954	248	20.63%	
98022	325	325	0	0.00%	
98023	1,023	727	296	28.93%	
98024	40	40	0	0.00%	
98026	920	614	306	33.26%	
98027	1,024	875	149	14.55%	
98028	759	588	171	22.53%	
98029	1,340	920	420	31.34%	
98030	1,115	874	241	21.61%	
98031	1,221	1,159	62	5.08%	
98032	978	600	378	38.65%	
98033	1,652	1,238	414	25.06%	
98034	1,482	1,292	190	12.82%	
98036	1,994	1,169	825	41.37%	

Percent Decline in Child Care Capacity by Zip

Zipcode	Total Capacity of Programs Open in February	Total Capacity of Programs Open in June	Total Capacity Closed	Percent Decline in Capacity	Percent Decline in Capacity
98037	676	427	249	36.83%	
98038	627	541	86	13.72%	
98039	90	0	90	100.00%	
98040	948	676	272	28.69%	
98042	1,181	972	209	17.70%	
98043	703	223	480	68.28%	
98045	335	199	136	40.60%	
98047	207	162	45	21.74%	
98052	2,913	2,117	796	27.33%	
98053	1,007	731	276	27.41%	
98055	722	632	90	12.47%	
98056	772	385	387	50.13%	
98057	462	412	50	10.82%	
98058	1,220	777	443	36.31%	
98059	898	626	272	30.29%	
98065	500	356	144	28.80%	
98070	69	69	0	0.00%	
98072	862	484	378	43.85%	
98074	1,105	1,015	90	8.14%	
98075	202	172	30	14.85%	
98077	201	113	88	43.78%	
98087	561	561	0	0.00%	
98092	485	395	90	18.56%	
98101	613	306	307	50.08%	
98102	311	87	224	72.03%	
98103	1,163	828	335	28.80%	
98104	798	758	40	5.01%	
98105	1,391	1,123	268	19.27%	

Percent Decline in Child Care Capacity by Zip

Zipcode	Total Capacity of Programs Open in February	Total Capacity of Programs Open in June	Total Capacity Closed	Percent Decline in Capacity	Percent Decline in Capacity
98106	1,468	976	492	33.51%	 0.00% 100.00%
98107	785	467	318	40.51%	
98108	1,794	1,183	611	34.06%	
98109	1,239	866	373	30.10%	
98110	400	370	30	7.50%	
98111	76	0	76	100.00%	
98112	779	377	402	51.60%	
98115	2,391	1,995	396	16.56%	
98116	665	273	392	58.95%	
98117	888	747	141	15.88%	
98118	2,154	1,689	465	21.59%	
98119	504	432	72	14.29%	
98121	283	0	283	100.00%	
98122	1,439	968	471	32.73%	
98125	1,483	1,087	396	26.70%	
98126	1,352	972	380	28.11%	
98133	1,376	769	607	44.11%	
98134	266	52	214	80.45%	
98136	377	167	210	55.70%	
98144	1,125	726	399	35.47%	
98146	958	715	243	25.37%	
98148	520	520	0	0.00%	
98155	701	683	18	2.57%	
98166	913	522	391	42.83%	
98168	1,065	981	84	7.89%	
98177	170	124	46	27.06%	
98178	569	519	50	8.79%	
98188	693	653	40	5.77%	

Percent Decline in Child Care Capacity by Zip

Zipcode	Total Capacity of Programs Open in February	Total Capacity of Programs Open in June	Total Capacity Closed	Percent Decline in Capacity	Percent Decline in Capacity
98198	824	758	66	8.01%	0.00% 100.00%
98199	504	326	178	35.32%	
98201	631	433	198	31.38%	
98203	762	762	0	0.00%	
98204	916	916	0	0.00%	
98208	1,444	1,218	226	15.65%	
98221	285	146	139	48.77%	
98223	648	567	81	12.50%	
98225	1,701	786	915	53.79%	
98226	591	257	334	56.51%	
98229	148	118	30	20.27%	
98230	158	140	18	11.39%	
98233	427	328	99	23.19%	
98235	30	0	30	100.00%	
98236	40	0	40	100.00%	
98237	14	14	0	0.00%	
98239	96	62	34	35.42%	
98240	12	12	0	0.00%	
98241	91	50	41	45.05%	
98244	9	9	0	0.00%	
98245	133	81	52	39.10%	
98247	66	0	66	100.00%	
98248	197	107	90	45.69%	
98250	52	0	52	100.00%	
98251	10	0	10	100.00%	
98252	110	110	0	0.00%	
98257	40	40	0	0.00%	
98258	783	610	173	22.09%	

Percent Decline in Child Care Capacity by Zip

Zipcode	Total Capacity of Programs Open in February	Total Capacity of Programs Open in June	Total Capacity Closed	Percent Decline in Capacity	Percent Decline in Capacity
98260	128	49	79	61.72%	
98261	30	30	0	0.00%	
98264	254	218	36	14.17%	
98266	36	0	36	100.00%	
98267			0		
98270	745	721	24	3.22%	
98271	931	737	194	20.84%	
98272	663	596	67	10.11%	
98273	1,133	987	146	12.89%	
98274	216	173	43	19.91%	
98275	785	635	150	19.11%	
98276	42	42	0	0.00%	
98277	806	714	92	11.41%	
98278	264	264	0	0.00%	
98282	36	6	30	83.33%	
98284	247	171	76	30.77%	
98290	381	288	93	24.41%	
98292	402	294	108	26.87%	
98294	126	86	40	31.75%	
98295	9	9	0	0.00%	
98296	397	333	64	16.12%	
98310	541	322	219	40.48%	
98311	494	370	124	25.10%	
98312	628	349	279	44.43%	
98315	120	120	0	0.00%	
98321	264	244	20	7.58%	
98325	10	10	0	0.00%	
98327	387	375	12	3.10%	

Percent Decline in Child Care Capacity by Zip

Zipcode	Total Capacity of Programs Open in February	Total Capacity of Programs Open in June	Total Capacity Closed	Percent Decline in Capacity	Percent Decline in Capacity
98328	115	115	0	0.00%	0.00% 100.00%
98329	50	20	30	60.00%	
98331	62	24	38	61.29%	
98332	246	181	65	26.42%	
98333	12	12	0	0.00%	
98335	949	703	246	25.92%	
98337	255	0	255	100.00%	
98338	490	190	300	61.22%	
98339	97	77	20	20.62%	
98346	251	233	18	7.17%	
98350	48	0	48	100.00%	
98354	384	378	6	1.56%	
98356	23	23	0	0.00%	
98357	50	0	50	100.00%	
98360	200	200	0	0.00%	
98362	411	359	52	12.65%	
98363	240	223	17	7.08%	
98366	745	699	46	6.17%	
98367	380	245	135	35.53%	
98368	124	24	100	80.65%	
98370	616	616	0	0.00%	
98371	545	380	165	30.28%	
98372	638	283	355	55.64%	
98373	541	145	396	73.20%	
98374	1,395	996	399	28.60%	
98375	832	370	462	55.53%	
98380	10	10	0	0.00%	
98382	261	190	71	27.20%	


Percent Decline in Child Care Capacity by Zip

Zipcode	Total Capacity of Programs Open in February	Total Capacity of Programs Open in June	Total Capacity Closed	Percent Decline in Capacity	Percent Decline in Capacity
98383	652	513	139	21.32%	
98387	1,078	743	335	31.08%	
98388	34	34	0	0.00%	
98390	248	190	58	23.39%	
98391	693	564	129	18.61%	
98392	22	22	0	0.00%	
98394	40	10	30	75.00%	
98396	10	10	0	0.00%	
98402	144	74	70	48.61%	
98403	192	72	120	62.50%	
98404	574	506	68	11.85%	
98405	1,001	923	78	7.79%	
98406	376	69	307	81.65%	
98407	666	498	168	25.23%	
98408	331	286	45	13.60%	
98409	445	305	140	31.46%	
98418	105	93	12	11.43%	
98422	401	217	184	45.89%	
98424	74	74	0	0.00%	
98433	1,773	1,291	482	27.19%	
98438	336	0	336	100.00%	
98443	136	36	100	73.53%	
98444	1,206	1,091	115	9.54%	
98445	656	572	84	12.80%	
98446	319	247	72	22.57%	
98465	635	514	121	19.06%	
98466	1,405	605	800	56.94%	
98467	179	64	115	64.25%	

Percent Decline in Child Care Capacity by Zip

Zipcode	Total Capacity of Programs Open in February	Total Capacity of Programs Open in June	Total Capacity Closed	Percent Decline in Capacity	Percent Decline in Capacity
98498	560	484	76	13.57%	
98499	756	649	107	14.15%	
98501	1,386	1,071	315	22.73%	
98502	1,026	676	350	34.11%	
98503	1,387	927	460	33.17%	
98505	76	0	76	100.00%	
98506	217	167	50	23.04%	
98507	42	12	30	71.43%	
98508	9	9	0	0.00%	
98511	243	243	0	0.00%	
98512	564	373	191	33.87%	
98513	525	326	199	37.90%	
98516	1,045	924	121	11.58%	
98520	437	339	98	22.43%	
98522	18	18	0	0.00%	
98528	216	198	18	8.33%	
98531	715	526	189	26.43%	
98532	316	266	50	15.82%	
98537	21	21	0	0.00%	
98538	6	0	6	100.00%	
98540	42	0	42	100.00%	
98541	200	182	18	9.00%	
98547	47	47	0	0.00%	
98550	204	188	16	7.84%	
98557	30	12	18	60.00%	
98563	54	54	0	0.00%	
98568	145	125	20	13.79%	
98569	48	36	12	25.00%	

Percent Decline in Child Care Capacity by Zip

Zipcode	Total Capacity of Programs Open in February	Total Capacity of Programs Open in June	Total Capacity Closed	Percent Decline in Capacity	Percent Decline in Capacity
98571	40	0	40	100.00%	 0.00% 100.00%
98576	153	113	40	26.14%	
98577	52	34	18	34.62%	
98579	89	49	40	44.94%	
98580	153	153	0	0.00%	
98582	20	0	20	100.00%	
98584	663	465	198	29.86%	
98586	86	0	86	100.00%	
98587	57	0	57	100.00%	
98589	51	51	0	0.00%	
98591	96	76	20	20.83%	
98592	9	9	0	0.00%	
98595	22	22	0	0.00%	
98596	12	12	0	0.00%	
98597	421	409	12	2.85%	
98604	232	166	66	28.45%	
98605	13	13	0	0.00%	
98606	103	91	12	11.65%	
98607	259	115	144	55.60%	
98610	147	77	70	47.62%	
98611	117	79	38	32.48%	
98612	56	56	0	0.00%	
98620	92	0	92	100.00%	
98625	36	0	36	100.00%	
98626	509	398	111	21.81%	
98629	112	112	0	0.00%	
98631	40	40	0	0.00%	
98632	1,344	801	543	40.40%	

Percent Decline in Child Care Capacity by Zip

Zipcode	Total Capacity of Programs Open in February	Total Capacity of Programs Open in June	Total Capacity Closed	Percent Decline in Capacity	Percent Decline in Capacity
98640	6	6	0	0.00%	0.00% 100.00%
98642	268	16	252	94.03%	
98644	67	67	0	0.00%	
98648	54	54	0	0.00%	
98650	6	6	0	0.00%	
98651	8	0	8	100.00%	
98660	327	252	75	22.94%	
98661	957	648	309	32.29%	
98662	1,364	1,048	316	23.17%	
98663	401	204	197	49.13%	
98664	488	418	70	14.34%	
98665	530	437	93	17.55%	
98668	32	10	22	68.75%	
98671	213	143	70	32.86%	
98672	56	20	36	64.29%	
98674	311	132	179	57.56%	
98675	10	10	0	0.00%	
98682	849	581	268	31.57%	
98683	1,190	933	257	21.60%	
98684	640	365	275	42.97%	
98685	528	516	12	2.27%	
98686	853	688	165	19.34%	
98801	1,422	1,155	267	18.78%	
98802	813	813	0	0.00%	
98812	182	174	8	4.40%	
98813	167	167	0	0.00%	
98815	84	60	24	28.57%	
98816	75	75	0	0.00%	

Percent Decline in Child Care Capacity by Zip

Zipcode	Total Capacity of Programs Open in February	Total Capacity of Programs Open in June	Total Capacity Closed	Percent Decline in Capacity	Percent Decline in Capacity
98817			0		0.00% 100.00%
98822	36	36	0	0.00%	
98823	225	193	32	14.22%	
98826	36	0	36	100.00%	
98829	8	8	0	0.00%	
98831	106	106	0	0.00%	
98837	1,062	866	196	18.46%	
98840	30	30	0	0.00%	
98841	120	84	36	30.00%	
98843	21	21	0	0.00%	
98844	43	23	20	46.51%	
98846	12	12	0	0.00%	
98847	60	30	30	50.00%	
98848	457	379	78	17.07%	
98850	8	8	0	0.00%	
98851	12	12	0	0.00%	
98855	40	10	30	75.00%	
98856	18	18	0	0.00%	
98857	70	70	0	0.00%	
98858	22	22	0	0.00%	
98862	114	94	20	17.54%	
98901	1,091	684	407	37.31%	
98902	1,555	1,190	365	23.47%	
98903	152	152	0	0.00%	
98908	1,250	458	792	63.36%	
98920	25	25	0	0.00%	
98922	8	0	8	100.00%	
98926	630	402	228	36.19%	

Percent Decline in Child Care Capacity by Zip

Zipcode	Total Capacity of Programs Open in February	Total Capacity of Programs Open in June	Total Capacity Closed	Percent Decline in Capacity	Percent Decline in Capacity
98930	608	358	250	41.12%	
98932	212	117	95	44.81%	
98933	147	6	141	95.92%	
98935	221	129	92	41.63%	
98936	50	30	20	40.00%	
98937	6	6	0	0.00%	
98941	75	75	0	0.00%	
98942	414	363	51	12.32%	
98944	1,104	684	420	38.04%	
98947	24	12	12	50.00%	
98948	541	224	317	58.60%	
98951	428	65	363	84.81%	
98953	36	36	0	0.00%	
99001	106	66	40	37.74%	
99003	67	30	37	55.22%	
99004	354	354	0	0.00%	
99005	131	78	53	40.46%	
99006	120	93	27	22.50%	
99011	210	210	0	0.00%	
99013	6	6	0	0.00%	
99016	36	36	0	0.00%	
99019	268	268	0	0.00%	
99021	132	87	45	34.09%	
99022	161	141	20	12.42%	
99026	62	62	0	0.00%	
99027	53	53	0	0.00%	
99033	12	12	0	0.00%	
99037	558	469	89	15.95%	

Percent Decline in Child Care Capacity by Zip

Zipcode	Total Capacity of Programs Open in February	Total Capacity of Programs Open in June	Total Capacity Closed	Percent Decline in Capacity
99040	62	62	0	0.00%
99109	10	10	0	0.00%
99111	62	62	0	0.00%
99114	118	78	40	33.90%
99115	6	6	0	0.00%
99116	42	42	0	0.00%
99119	95	95	0	0.00%
99122	26	26	0	0.00%
99130	35	0	35	100.00%
99140	30	30	0	0.00%
99141	62	62	0	0.00%
99155	83	83	0	0.00%
99156	32	12	20	62.50%
99158	18	0	18	100.00%
99163	733	647	86	11.73%
99164	171	0	171	100.00%
99166	8	8	0	0.00%
99170	27	27	0	0.00%
99181	45	45	0	0.00%
99185	24	24	0	0.00%
99201	782	708	74	9.46%
99202	627	583	44	7.02%
99203	532	352	180	33.83%
99204	184	72	112	60.87%
99205	1,410	1,236	174	12.34%
99206	1,024	967	57	5.57%
99207	890	757	133	14.94%
99208	1,121	835	286	25.51%



Appendix G. REMI Economic Model

The following description provides technical documentation of the REMI PI+ economic model used in the analysis of economic and fiscal impact of child care inaccessibility.

The PI+ is a structural economic forecasting and policy analysis model. The following core framework applies to all REMI model builds. The model integrates input-output, computable general equilibrium, econometric, and economic geography methodologies. It is also dynamic, with forecasts and simulations generated on an annual basis and behavioral responses to compensation, price, and other economic factors included.

The model consists of thousands of simultaneous equations with a structure that is relatively straightforward. The exact number of equations used varies depending on the extent of industry, demographic, demand, and other detail in the specific model being leveraged. The overall structure of the model can be summarized in five major blocks: (1) Output and Demand, (2) Labor and Capital Demand, (3) Population and Labor Supply, (4) Compensation, Prices, and Costs, and (5) Market Shares. The blocks and their key interactions are shown in Figures G.1 and G.2.

Figure G.1: REMI Model Linkages

REMI Model Linkages (Excluding Economic Geography Linkages)

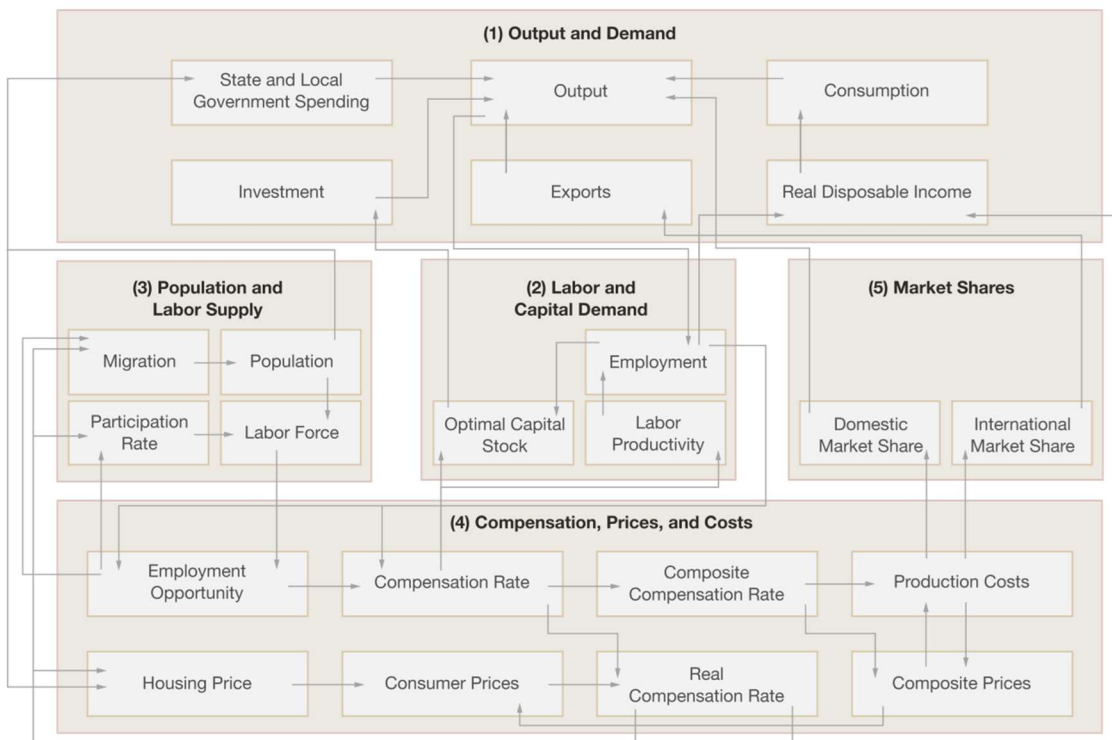
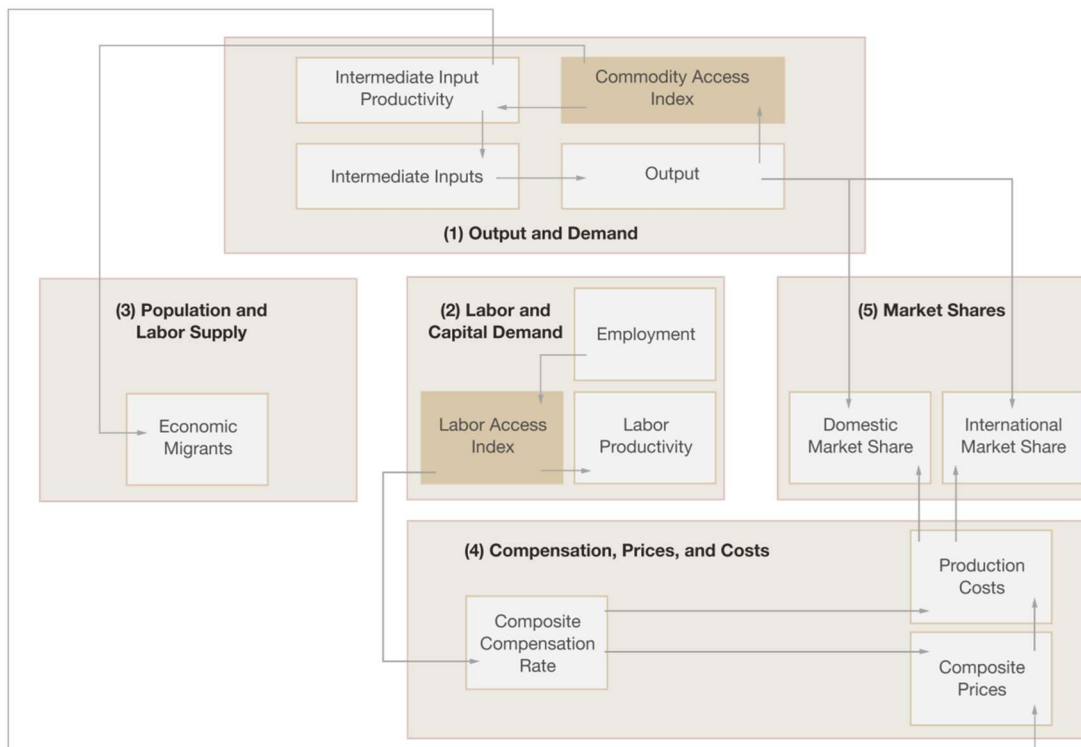


Figure G.2: Economic Geography Linkages

Economic Geography Linkages



The Output and Demand block consists of output, demand, consumption, investment, government spending, exports, and imports, as well as feedback from output change due to the change in the productivity of intermediate inputs. The Labor and Capital Demand block includes labor intensity and productivity as well as demand for labor and capital. Labor force participation rate and migration equations are in the Population and Labor Supply block and the Compensation, Prices, and Costs block includes composite prices, determinants of production costs, the consumption price deflator, housing prices, and the compensation equations. Lastly, the proportion of local, inter-regional, and export markets captured by each region is included in the Market Shares block.

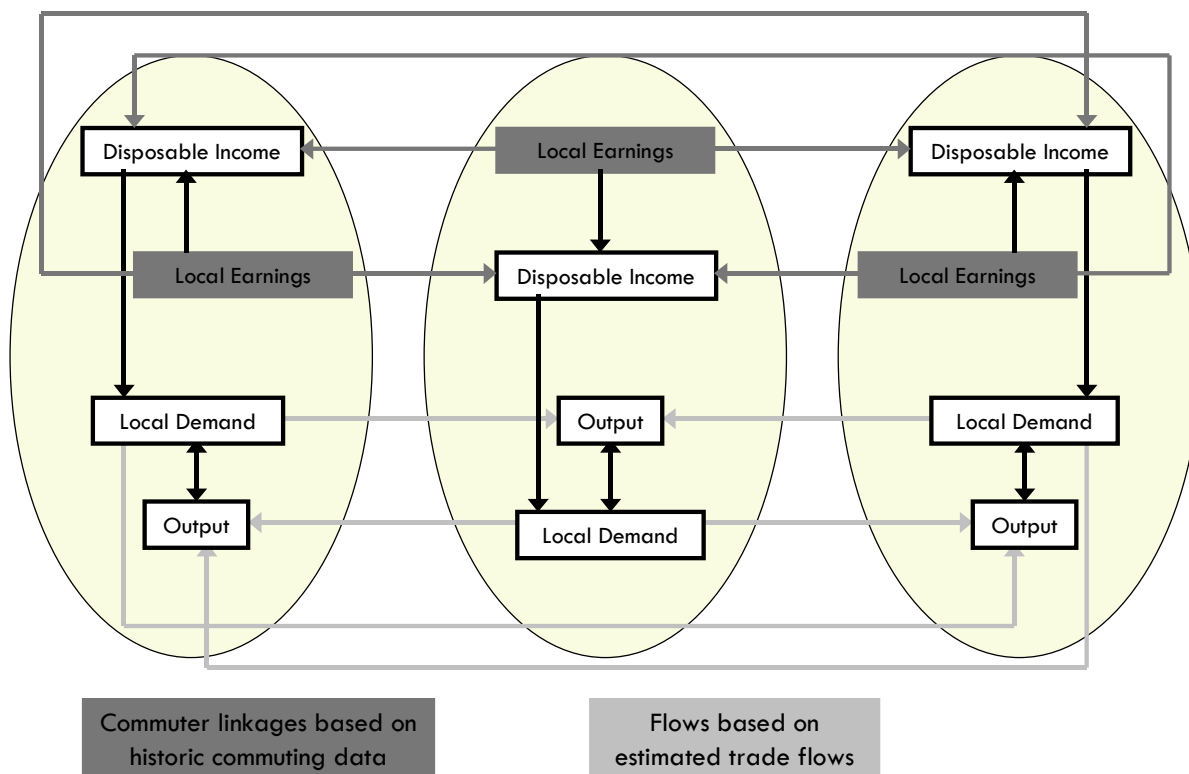
REMI models can be built as single region, multi-region, or multi-region national models. A region is defined broadly as a sub-national area, and could consist of a state, province, county, city, or any combination of sub-national areas.

Single-region models consist of an individual region, called the home region. The rest of the nation is also represented in the model. However, since the home region is only a small part of the total nation, the changes in the region do not have an endogenous effect on the variables in the rest of the nation. In the case of this economic and fiscal impact analysis, the home region is Washington State.

Multi-regional models have interactions among regions, such as trade and commuting flows. These interactions include trade flows from each region to each of the other regions and are illustrated for a three-region model in Figure G.3. However, this does not occur the model leveraged for this Washington state analysis since the focus is on one home region.

Figure G.3: Trade and Commuter Flow Linkages

Trade and Commuter Flow Linkages



Multi-regional national models, in contrast to single region and multi-region models, include a central bank monetary response that constrains labor markets. Of note, models that only encompass a relatively small portion of a nation are not endogenously constrained by changes in exchange rates or monetary responses.

Block 1. Output and Demand

As mentioned previously, this block includes output, demand, consumption, investment, government spending, import, commodity access, and export concepts. Output for each industry in the home region is determined by industry demand in all regions in the nation, the home region's share of each market, and international exports from the region.

For each industry, demand is determined by the amount of output, consumption, investment, and capital demand on that industry. Consumption depends on the real disposable income per capita, relative prices, differential income elasticities, and population. Input productivity depends

on access to inputs because a larger choice set of inputs means it is more likely that the input with the specific characteristics required for the job will be found. In the capital stock adjustment process, investment occurs to fill the difference between optimal and actual capital stock for residential, non-residential, and equipment investment. Lastly, government spending changes are determined by changes in the population.

Block 2. Labor and Capital Demand

To reiterate, the Labor and Capital Demand block includes the determination of labor productivity, labor intensity, and the optimal capital stocks. Industry-specific labor productivity depends on the availability of workers with differentiated skills for the occupations used in each industry while the occupational labor supply and commuting costs determine firms' access to a specialized labor force.

Labor intensity is determined by the cost of labor relative to the other factor inputs, capital and fuel. Demand for capital is driven by the optimal capital stock equation for both non-residential capital and equipment. Optimal capital stock for each industry depends on the relative cost of labor and capital, and the employment weighted by capital use for each industry. Employment in private industries is determined by the value added and employment per unit of value added in each industry.

Block 3. Population and Labor Supply

The Population and Labor Supply block includes detailed demographic information about the region. Population data is given for age, gender, and race, with birth and survival rates for each group. The size and labor force participation rate of each group determines the labor supply. These participation rates respond to changes in employment relative to the potential labor force and to changes in the real after-tax compensation rate. Migration includes retirement, military, international, and economic migration. Economic migration is determined by the relative real after-tax compensation rate, relative employment opportunity, and consumer access to variety.

Block 4. Compensation, Prices and Costs

This block includes delivered prices, production costs, equipment cost, the consumption deflator, consumer prices, the price of housing, and the compensation equation. Economic geography concepts account for the productivity and price effects of access to specialized labor, goods, and services.

These prices measure the price of the industry output, taking into account the access to production locations. This access is important due to the specialization of production that takes place within each industry, and because transportation and transaction costs of distance are significant. Composite prices for each industry are then calculated based on the production costs of supplying regions, the effective distance to these regions, and the index of access to the variety of outputs in the industry relative to the access by other uses of the product.

The cost of production for each industry is determined by the cost of labor, capital, fuel, and intermediate inputs. Labor costs reflect a productivity adjustment to account for access to specialized labor, as well as underlying compensation rates, capital costs include costs of non-

residential structures and equipment, and fuel costs incorporate electricity, natural gas, and residual fuels.

The consumption deflator converts industry prices to prices for consumption commodities. For potential migrants, the consumer price is additionally calculated to include housing prices. Also, housing prices change from their initial level depending on changes in income and population density.

Compensation changes are due to changes in labor demand, supply conditions, and in the national compensation rate. Changes in employment opportunities relative to the labor force and occupational demand change determine compensation rates by industry.

Block 5. Market Shares

The market shares equations measure the proportion of local and export markets that are captured by each industry. These depend on relative production costs, the estimated price elasticity of demand, and the effective distance between the home region and each of the other regions. The change in share of a specific area in any region depends on changes in its delivered price and the quantity it produces compared with the same factors for competitors in that market. The share of local and external markets then drives the exports from and imports to the home region's economy.

Appendix H. Economic Impact Tables

Table H.1. Inaccessibility to Child Care in Washington State - Summary Economic Impact

Category	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	Annual Average 2019-2028	Percent of State Total 2019
Total Employment (Thousands)	-161.3	-152.0	-150.4	-145.2	-136.9	-128.9	-121.8	-116.1	-112.0	-109.1	-133.4	3.5
Private Non-Farm Employment (Thousands)	-148.9	-133.8	-130.0	-124.4	-115.9	-108.2	-101.8	-96.6	-93.1	-90.6	-114.3	3.9
Residence Adjusted Employment (Thousands)	-159.0	-149.2	-147.8	-143.0	-134.9	-127.2	-120.5	-114.9	-111.0	-108.2	-131.6	3.5
Population (Thousands)	-51.8	-84.5	-109.1	-127.1	-139.9	-148.9	-155.4	-160.1	-163.8	-166.9	-130.7	0.7
Labor Force (Thousands)	-50.7	-74.1	-89.5	-98.2	-102.2	-103.3	-102.7	-101.2	-99.4	-97.8	-91.9	1.3
Gross Domestic Product (Billions of Fixed 2019 \$'s)	-39.2	-36.9	-36.8	-36.7	-35.5	-34.3	-33.3	-32.3	-31.6	-31.0	-34.8	7.4
Output (Billions of Fixed 2019 \$'s)	-64.2	-60.5	-60.3	-60.1	-58.1	-56.1	-54.3	-52.8	-51.5	-50.5	-56.8	7.2
Value-Added (Billions of Fixed 2019 \$'s)	-39.2	-36.9	-36.8	-36.7	-35.5	-34.3	-33.3	-32.3	-31.6	-31.0	-34.8	7.4
Personal Income (Billions of Fixed 2019 \$'s)	-16.7	-14.2	-14.8	-15.2	-14.9	-14.6	-14.3	-14.1	-14.0	-14.0	-14.7	3.8
Disposable Personal Income (Billions of Fixed 2019 \$'s)	-14.5	-12.4	-12.9	-13.2	-13.0	-12.8	-12.5	-12.2	-12.1	-12.1	-12.8	3.8

Source: ICF utilizing the REMI PI+ economic model.

Table H.2 Inaccessibility of Child Care in Washington State – Employment Impact by Industry (thousands)

Industry	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	Annual Average 2019-2028
Forestry, fishing, and hunting	-5.4	-5.4	-5.1	-4.9	-4.7	-4.6	-4.5	-4.4	-4.2	-4.1	-4.7
Forestry and Logging; Fishing, hunting and trapping	-0.2	-0.2	-0.2	-0.2	-0.2	-0.2	-0.2	-0.2	-0.2	-0.2	-0.2
Support activities for agriculture and forestry	-5.2	-5.2	-4.9	-4.7	-4.6	-4.4	-4.3	-4.2	-4.1	-4.0	-4.6
Mining	12.9	12.1	11.3	11.0	10.4	9.9	9.3	8.8	8.3	7.8	10.2
Oil and gas extraction	13.1	12.3	11.5	11.1	10.5	10.0	9.5	9.0	8.4	7.9	10.3
Mining (except oil and gas)	-0.3	-0.3	-0.2	-0.2	-0.2	-0.2	-0.2	-0.1	-0.1	-0.1	-0.2
Support activities for mining	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Utilities	-0.4	-0.4	-0.4	-0.4	-0.3	-0.3	-0.3	-0.3	-0.3	-0.3	-0.3
Construction	-13.4	-14.0	-12.9	-10.6	-8.0	-5.7	-3.8	-2.4	-1.6	-1.3	-7.4
Manufacturing	-7.9	-7.3	-6.6	-6.1	-5.6	-5.1	-4.8	-4.5	-4.3	-4.1	-5.6
Wood product manufacturing	-0.8	-0.8	-0.7	-0.6	-0.6	-0.5	-0.5	-0.4	-0.4	-0.4	-0.6
Nonmetallic mineral product manufacturing	-0.5	-0.5	-0.5	-0.4	-0.4	-0.3	-0.3	-0.3	-0.2	-0.2	-0.4
Primary metal manufacturing	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1
Fabricated metal product manufacturing	-0.9	-0.8	-0.7	-0.7	-0.6	-0.5	-0.5	-0.5	-0.4	-0.4	-0.6
Machinery manufacturing	-0.2	-0.1	-0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.1
Computer and electronic product manufacturing	-0.3	-0.2	-0.1	0.0	0.0	0.0	0.1	0.1	0.1	0.1	0.0
Electrical equipment, appliance, and component manufacturing	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Motor vehicles, bodies and trailers, and parts manufacturing	-0.1	-0.1	-0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other transportation equipment manufacturing	-0.2	-0.1	-0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Furniture and related product manufacturing	-0.3	-0.3	-0.2	-0.2	-0.2	-0.2	-0.2	-0.2	-0.1	-0.1	-0.2

Industry	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	Annual Average 2019-2028
Miscellaneous manufacturing	-0.4	-0.3	-0.3	-0.3	-0.2	-0.2	-0.2	-0.2	-0.2	-0.2	-0.3
Food manufacturing	-2.2	-2.1	-2.0	-2.0	-1.9	-1.8	-1.7	-1.7	-1.6	-1.6	-1.9
Beverage and tobacco product manufacturing	-0.3	-0.3	-0.3	-0.3	-0.3	-0.3	-0.3	-0.3	-0.3	-0.3	-0.3
Textile mills; Textile product mills	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1
Apparel manufacturing; Leather and allied product manufacturing	-0.2	-0.2	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1
Paper manufacturing	-0.3	-0.3	-0.2	-0.2	-0.2	-0.2	-0.2	-0.2	-0.2	-0.2	-0.2
Printing and related support activities	-0.3	-0.3	-0.3	-0.3	-0.2	-0.2	-0.2	-0.2	-0.2	-0.2	-0.2
Petroleum and coal products manufacturing	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1
Chemical manufacturing	-0.3	-0.2	-0.2	-0.2	-0.2	-0.2	-0.2	-0.2	-0.2	-0.1	-0.2
Plastics and rubber products manufacturing	-0.5	-0.4	-0.4	-0.4	-0.3	-0.3	-0.3	-0.3	-0.3	-0.3	-0.3
Wholesale trade	-7.0	-6.3	-6.0	-5.7	-5.4	-5.0	-4.8	-4.5	-4.3	-4.1	-5.3
Retail trade	-14.0	-12.1	-11.5	-11.1	-10.4	-9.8	-9.2	-8.8	-8.6	-8.4	-10.4
Transportation and warehousing	-8.8	-8.0	-7.7	-7.5	-7.1	-6.8	-6.5	-6.2	-6.0	-5.8	-7.0
Air transportation	-0.5	-0.5	-0.4	-0.4	-0.4	-0.4	-0.3	-0.3	-0.3	-0.3	-0.4
Rail transportation	-0.1	-0.1	-0.1	-0.1	-0.1	0.0	0.0	0.0	0.0	0.0	-0.1
Water transportation	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	0.0	-0.1
Truck transportation	-2.0	-1.8	-1.7	-1.7	-1.6	-1.5	-1.4	-1.3	-1.3	-1.2	-1.5
Couriers and messengers	-1.3	-1.2	-1.1	-1.1	-1.1	-1.0	-1.0	-0.9	-0.9	-0.9	-1.0
Transit and ground passenger transportation	-2.4	-2.2	-2.2	-2.2	-2.1	-2.0	-2.0	-1.9	-1.9	-1.8	-2.1
Pipeline transportation	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Scenic and sightseeing transportation; Support activities for transportation	-1.4	-1.2	-1.2	-1.1	-1.1	-1.0	-1.0	-0.9	-0.9	-0.9	-1.1

Industry	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	Annual Average 2019-2028
Warehousing and storage	-1.0	-0.9	-0.9	-0.8	-0.8	-0.8	-0.7	-0.7	-0.7	-0.7	-0.8
Information	-2.6	-2.2	-2.0	-1.9	-1.7	-1.5	-1.4	-1.3	-1.2	-1.1	-1.7
Publishing industries, except Internet	-0.2	-0.1	-0.1	0.0	0.0	0.1	0.1	0.1	0.1	0.2	0.0
Motion picture and sound recording industries	-0.3	-0.2	-0.2	-0.2	-0.2	-0.1	-0.1	-0.1	-0.1	-0.1	-0.2
Data processing, hosting, and related services; Other information services	-0.9	-0.9	-0.8	-0.8	-0.8	-0.7	-0.7	-0.7	-0.6	-0.6	-0.8
Broadcasting, except Internet	-0.2	-0.2	-0.2	-0.2	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1
Telecommunications	-0.9	-0.8	-0.7	-0.7	-0.7	-0.6	-0.6	-0.5	-0.5	-0.4	-0.6
Finance and insurance	-8.6	-7.5	-7.3	-7.0	-6.5	-6.1	-5.8	-5.5	-5.3	-5.1	-6.4
Monetary authorities - central bank; Credit intermediation and related activities	-1.7	-1.4	-1.4	-1.3	-1.2	-1.1	-1.0	-1.0	-0.9	-0.9	-1.2
Securities, commodity contracts, other investments; Funds, trusts, other financial vehicles	-4.1	-3.5	-3.4	-3.3	-3.1	-2.9	-2.7	-2.6	-2.5	-2.5	-3.1
Insurance carriers and related activities	-2.8	-2.6	-2.5	-2.4	-2.2	-2.1	-2.0	-1.9	-1.8	-1.8	-2.2
Real estate and rental and leasing	-11.1	-9.8	-10.0	-9.9	-9.4	-9.0	-8.6	-8.2	-8.0	-7.8	-9.2
Real estate	-10.3	-9.0	-9.2	-9.1	-8.7	-8.3	-8.0	-7.7	-7.5	-7.3	-8.5
Rental and leasing services; Lessors of nonfinancial intangible assets	-0.9	-0.8	-0.8	-0.7	-0.7	-0.6	-0.6	-0.6	-0.5	-0.5	-0.7
Professional, scientific, and technical services	-15.8	-14.4	-13.5	-12.6	-11.6	-10.6	-9.8	-9.0	-8.5	-8.1	-11.4
Management of companies and enterprises	-0.8	-0.7	-0.7	-0.6	-0.6	-0.5	-0.5	-0.5	-0.5	-0.4	-0.6
Administrative, support, waste management, and remediation services	-15.1	-13.8	-13.5	-13.2	-12.6	-12.0	-11.5	-11.0	-10.7	-10.4	-12.4

Industry	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	Annual Average 2019-2028
Administrative and support services	-14.6	-13.3	-13.0	-12.7	-12.1	-11.5	-11.0	-10.6	-10.2	-9.9	-11.9
Waste management and remediation services	-0.6	-0.5	-0.5	-0.5	-0.5	-0.5	-0.5	-0.5	-0.4	-0.4	-0.5
Educational services; private	-3.2	-2.9	-3.0	-3.0	-2.9	-2.9	-2.8	-2.7	-2.7	-2.7	-2.9
Health care and social assistance	-16.1	-13.9	-14.0	-13.9	-13.5	-13.1	-12.7	-12.4	-12.3	-12.2	-13.4
Ambulatory health care services	-8.2	-6.9	-6.9	-6.8	-6.5	-6.2	-6.0	-5.8	-5.8	-5.7	-6.5
Hospitals; private	-1.9	-1.8	-1.8	-1.9	-1.8	-1.8	-1.7	-1.7	-1.7	-1.7	-1.8
Nursing and residential care facilities	-1.5	-1.4	-1.4	-1.4	-1.4	-1.4	-1.3	-1.3	-1.3	-1.3	-1.4
Social assistance	-4.4	-3.8	-3.9	-3.9	-3.8	-3.7	-3.6	-3.6	-3.5	-3.5	-3.8
Arts, entertainment, and recreation	-6.3	-5.3	-5.3	-5.1	-4.9	-4.6	-4.4	-4.3	-4.1	-4.0	-4.8
Performing arts, spectator sports, and related industries	-3.8	-3.2	-3.2	-3.1	-2.9	-2.8	-2.7	-2.6	-2.5	-2.4	-2.9
Museums, historical sites, and similar institutions	-0.1	-0.1	-0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Amusement, gambling, and recreation industries	-2.4	-2.0	-2.0	-2.0	-1.9	-1.8	-1.7	-1.7	-1.6	-1.6	-1.9
Accommodation and food services	-12.4	-11.3	-11.6	-11.8	-11.6	-11.4	-11.1	-10.9	-10.7	-10.5	-11.3
Accommodation	-1.8	-1.6	-1.6	-1.6	-1.5	-1.4	-1.4	-1.4	-1.3	-1.3	-1.5
Food services and drinking places	-10.6	-9.7	-10.1	-10.2	-10.1	-9.9	-9.7	-9.5	-9.4	-9.2	-9.8
Other services (except public administration)	-12.7	-10.5	-10.4	-10.1	-9.5	-9.1	-8.7	-8.4	-8.1	-7.9	-9.5
Repair and maintenance	-2.9	-2.4	-2.4	-2.3	-2.2	-2.0	-1.9	-1.8	-1.8	-1.7	-2.1
Personal and laundry services	-4.8	-3.9	-3.9	-3.9	-3.7	-3.6	-3.5	-3.4	-3.3	-3.2	-3.7
Religious, grant making, civic, professional, and similar organizations	-3.9	-3.2	-3.0	-2.9	-2.7	-2.5	-2.4	-2.3	-2.2	-2.2	-2.7
Private households	-1.2	-1.0	-1.0	-1.0	-1.0	-0.9	-0.9	-0.9	-0.8	-0.8	-1.0
State and Local Government	-12.4	-18.2	-20.3	-20.9	-20.9	-20.6	-20.0	-19.5	-18.9	-18.4	-19.0

Industry	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	Annual Average 2019-2028
State Government	-3.2	-4.8	-5.4	-5.6	-5.6	-5.6	-5.4	-5.3	-5.2	-5.1	-5.1
Local Government	-9.2	-13.4	-15.0	-15.3	-15.3	-15.0	-14.6	-14.2	-13.7	-13.3	-13.9
Federal Civilian	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Federal Military	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Farm	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Source: ICF utilizing the REMI PI+ economic model.

Table H.3 Inaccessibility of Child Care in Washington State – Gross State Impact by Component (Billions of Fixed 2019 \$'s)

Gross State Product Component	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Personal Consumption Expenditures	-1.23	-1.22	-1.37	-1.48	-1.55	-1.61	-1.67	-1.73	-1.79	-1.86
Gross Private Domestic Fixed Investment	-0.33	-0.47	-0.53	-0.53	-0.50	-0.46	-0.41	-0.36	-0.33	-0.30
Change in Private Inventories	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Net Trade of Goods and Services	0.58	0.55	0.58	0.60	0.60	0.59	0.58	0.58	0.58	0.58
Government Consumption Expenditures and Gross Investment	-0.15	-0.22	-0.25	-0.27	-0.29	-0.30	-0.30	-0.31	-0.31	-0.32
Exogenous Final Demand	-1.44	-1.34	-1.34	-1.35	-1.33	-1.30	-1.28	-1.25	-1.23	-1.21

Source: ICF utilizing the REMI PI+ economic model.

Table H. 4 Inaccessibility of Child Care in Washington State – Output Impact by Industry (Billions of Fixed 2019 \$'s)

Industries	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	Annual Average 2019-2028
Forestry and Logging; Fishing, hunting and trapping	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01
Support activities for agriculture and forestry	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01
Oil and gas extraction	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Mining (except oil and gas)	0.00	-0.01	-0.01	-0.01	-0.01	0.00	0.00	0.00	0.00	0.00	0.00
Support activities for mining	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Utilities	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03	-0.04	-0.04	-0.03
Construction	-0.41	-0.51	-0.54	-0.55	-0.52	-0.48	-0.44	-0.41	-0.38	-0.35	-0.46
Wood product manufacturing	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03
Nonmetallic mineral product manufacturing	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02
Primary metal manufacturing	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01
Fabricated metal product manufacturing	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03
Machinery manufacturing	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02
Computer and electronic product manufacturing	-0.03	-0.03	-0.03	-0.04	-0.04	-0.04	-0.04	-0.04	-0.04	-0.05	-0.04
Electrical equipment, appliance, and component manufacturing	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Motor vehicles, bodies and trailers, and parts manufacturing	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01
Other transportation equipment manufacturing	-0.08	-0.08	-0.09	-0.09	-0.10	-0.10	-0.10	-0.10	-0.10	-0.10	-0.09
Furniture and related product manufacturing	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01
Miscellaneous manufacturing	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02
Food manufacturing	-0.08	-0.09	-0.10	-0.10	-0.10	-0.11	-0.11	-0.11	-0.12	-0.12	-0.10
Beverage and tobacco product manufacturing	-0.01	-0.01	-0.01	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02
Textile mills; Textile product mills	0.00	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01
Apparel manufacturing; Leather and allied product manufacturing	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.02	-0.02	-0.02	-0.02	-0.01
Paper manufacturing	-0.01	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02
Printing and related support activities	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01
Petroleum and coal products manufacturing	-0.03	-0.04	-0.04	-0.04	-0.04	-0.04	-0.04	-0.04	-0.04	-0.04	-0.04
Chemical manufacturing	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02

Industries	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	Annual Average 2019-2028
Plastics and rubber products manufacturing	-0.01	-0.01	-0.01	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02
Wholesale trade	-0.17	-0.18	-0.19	-0.20	-0.21	-0.21	-0.21	-0.21	-0.22	-0.22	-0.20
Retail trade	-0.31	-0.32	-0.34	-0.37	-0.38	-0.38	-0.39	-0.40	-0.41	-0.42	-0.37
Air transportation	-0.02	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03
Rail transportation	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01
Water transportation	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01
Truck transportation	-0.05	-0.05	-0.05	-0.05	-0.05	-0.05	-0.05	-0.05	-0.05	-0.05	-0.05
Couriers and messengers	-0.02	-0.01	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02
Transit and ground passenger transportation	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03
Pipeline transportation	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Scenic and sightseeing transportation; Support activities for transportation	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03
Warehousing and storage	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01
Publishing industries, except Internet	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03	-0.04	-0.04	-0.04	-0.03
Motion picture and sound recording industries	0.00	0.00	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01
Data processing, hosting, and related services; Other information services	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03	-0.03
Broadcasting, except Internet	0.00	0.00	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01
Telecommunications	-0.05	-0.05	-0.06	-0.06	-0.06	-0.06	-0.06	-0.06	-0.06	-0.06	-0.06
Monetary authorities - central bank; Credit intermediation and related activities	-0.05	-0.05	-0.05	-0.05	-0.05	-0.05	-0.05	-0.05	-0.05	-0.05	-0.05
Securities, commodity contracts, other investments; Funds, trusts, other financial vehicles	-0.07	-0.07	-0.07	-0.08	-0.08	-0.08	-0.08	-0.08	-0.08	-0.08	-0.08
Insurance carriers and related activities	-0.07	-0.07	-0.07	-0.07	-0.07	-0.07	-0.07	-0.07	-0.07	-0.07	-0.07
Real estate	-0.39	-0.40	-0.44	-0.47	-0.48	-0.48	-0.48	-0.48	-0.49	-0.49	-0.46
Rental and leasing services; Lessors of nonfinancial intangible assets	-0.03	-0.04	-0.04	-0.04	-0.04	-0.04	-0.04	-0.04	-0.04	-0.04	-0.04
Professional, scientific, and technical services	-0.36	-0.36	-0.38	-0.39	-0.39	-0.39	-0.39	-0.38	-0.38	-0.38	-0.38
Management of companies and enterprises	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02
Administrative and support services	-0.16	-0.16	-0.17	-0.17	-0.18	-0.18	-0.18	-0.18	-0.18	-0.18	-0.17
Waste management and remediation services	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02

Industries	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	Annual Average 2019-2028
Educational services; private	-0.20	-0.18	-0.19	-0.20	-0.20	-0.20	-0.20	-0.20	-0.20	-0.19	-0.19
Ambulatory health care services	-0.20	-0.19	-0.20	-0.21	-0.21	-0.22	-0.22	-0.22	-0.23	-0.23	-0.21
Hospitals; private	-0.06	-0.07	-0.07	-0.08	-0.09	-0.09	-0.09	-0.10	-0.10	-0.10	-0.09
Nursing and residential care facilities	-0.04	-0.04	-0.05	-0.05	-0.05	-0.05	-0.05	-0.05	-0.05	-0.05	-0.05
Social assistance	-0.08	-0.07	-0.08	-0.08	-0.08	-0.08	-0.08	-0.08	-0.09	-0.09	-0.08
Performing arts, spectator sports, and related industries	-0.04	-0.04	-0.04	-0.05	-0.05	-0.05	-0.05	-0.05	-0.05	-0.05	-0.05
Museums, historical sites, and similar institutions	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Amusement, gambling, and recreation industries	-0.04	-0.04	-0.04	-0.04	-0.04	-0.04	-0.04	-0.04	-0.04	-0.04	-0.04
Accommodation	-0.04	-0.04	-0.05	-0.05	-0.05	-0.05	-0.05	-0.05	-0.05	-0.06	-0.05
Food services and drinking places	-0.15	-0.15	-0.16	-0.17	-0.17	-0.18	-0.18	-0.18	-0.18	-0.18	-0.17
Repair and maintenance	-0.04	-0.04	-0.04	-0.04	-0.04	-0.04	-0.04	-0.04	-0.04	-0.04	-0.04
Personal and laundry services	-0.06	-0.05	-0.06	-0.06	-0.06	-0.06	-0.06	-0.06	-0.06	-0.06	-0.06
Religious, grant making, civic, professional, and similar organizations	-0.06	-0.06	-0.06	-0.06	-0.06	-0.06	-0.06	-0.06	-0.06	-0.06	-0.06
Private households	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01	-0.01
State and Local Government	-0.28	-0.36	-0.41	-0.44	-0.46	-0.47	-0.48	-0.49	-0.49	-0.50	-0.44
Federal Civilian	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02	-0.02
Federal Military	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Farm	-0.06	-0.06	-0.06	-0.06	-0.06	-0.05	-0.05	-0.05	-0.05	-0.05	-0.06

Source: ICF utilizing the REMI PI+ economic model.

Appendix I. Workforce Demographic Characteristics

Workforce Analysis Methodology

This analysis of the early childhood workforce in the state is based on a dataset provided by the Washington State Department of Children, Youth and Families (DCYF) from MERIT, the state's early childhood educator workforce registry, in June 2020. The data included demographic and employment information for all active childhood educators. Education data was included only if it had been verified by MERIT staff.

ICF created a new data set including the recoded job titles listed in Table 1. Duplicate records were deleted from the data set. If education data were available, the record with the highest level of education was retained. If education data were not available, the most recently modified record was retained.

The new dataset includes 35,782 early childhood educators. Education data was available for 12,125 (34%) of educators. As displayed in Table 1, for most job titles, the proportion of the full sample and the sample with verified education data is similar. The exceptions are noted where there are higher or lower proportions of job titles in the subset with verified education data compared to the overall sample.

Because of the relatively small number of Early/Head Start, ECEAP and school-age educators, these job titles were combined with the center job titles during the data analysis. Family home lead teacher and family home owners were also combined into one job category. Recoding relied on protocols established in the Washington State Department of Early Learning (2017) Washington State Workforce and Training Report.

Workforce Demographics Tables

Table I.1. Job Titles and Job Categories

Recoded Job Titles Included in Dataset	Full Sample	Verified Education Data	Combined Job Categories for Analysis
Center Assistant/Aide*	32%	14%	Assistant/Aide
Early/Head Start Assistant Teacher	1%	2%	Assistant/Aide
ECEAP Assistant Teacher	2%	5%	Assistant/Aide
School-age Child Care Assistant	4%	1%	Assistant/Aide
Center Teacher	25%	23%	Teacher
Early/Head Start Lead Teacher	1%	3%	Teacher
ECEAP Lead Teacher**	2%	6%	Teacher
School-age Teacher	4%	2%	Teacher
Center Director/Manager**	8%	15%	Director/Manager
Early /Head Start Contact/Manager	<1%	1%	Director/Manager
ECEAP Contact/Manager	<1%	1%	Director/Manager
School Age Director/Manager	2%	4%	Director/Manager
Family Home Assistant/Aide*	8%	3%	Family Home Assistant/ Aide
Family Home Lead Teacher	2%	1%	Family Home Teacher/ Owner
Family Home Owner**	9%	19%	Family Home Teacher/ Owner
Total	100%	100%	
N=	35,782	12,125	

Source: MERIT, Washington Workforce Registry, June 2020.

*Proportion is higher in full dataset vs. subset having verified education data

**Proportion is lower in full dataset vs. subset having verified education data

Table I.2: Race/Ethnicity of the Washington Early Childhood Workforce

Race/Ethnicity	Percent
White	50%
Hispanic/Latino	19%
Black/African American	9%
Asian	8%
American Indian/Alaskan Native	1%
Pacific Islander	1%
Other	3%
Unknown	8%
N=35,782	100%

Source: MERIT, Washington Workforce Registry June 2020.

Table I.3. Languages Spoken by the Washington Early Childhood Workforce

Languages Spoken	Percent
English only	67%
English/Spanish	14%
English/Other	12%
English/Somali	3%
Spanish	2%
Other/Unknown	1%
N=35,776	100%

Source: MERIT, Washington Workforce Registry June 2020.

Table I.4: Age of the Washington Early Childhood Workforce

Age	Percent
29 or younger	39%
30-39 years	22%
40-49 years	17%
50-59 years	14%
60+ years	9%
Unknown	<1%
Total	100%
N=	35,782

Source: MERIT, Washington Workforce Registry June 2020.

Table I.5: Verified Highest Educational Attainment of the Washington Early Childhood Workforce

Verified Highest Educational Attainment	Percent
Pre-Associate's degree	45%
Associate's degree	17%
Working on Bachelor's degree	2%
Bachelor's degree	27%
Post-Bachelor's degree (Working on or attained)	9%
Total	100%
N=	12,125

Source: MERIT, Washington Workforce Registry June 2020.

Table I.6: Verified Highest Educational Attainment by Job Title

Verified Highest Educational Attainment	Assistant/ Aide	Teacher	Director/ Manager	Family Home Assistant/ Aide	Family Home Teacher/ Owner
Pre-Associate's degree	51%	34%	23%	63%	77%
Associate's degree	17%	23%	19%	12%	9%
Working on Bachelor's degree	3%	2%	3%	1%	1%
Bachelor's degree	24%	33%	39%	17%	10%
Post-Bachelor's degree (working on or attained)	5%	9%	17%	7%	3%
Total	100%	100%	100%	100%	100%
N=	2638	4121	2501	391	2474

Source: MERIT, Washington Workforce Registry June 2020.

Table I.7. Certificate Attainment by the Washington Early Childhood Workforce

Certificate type	Percent
Initial Certificate or equivalent	74%
Short Certificate or equivalent	7%
ECE State Certificate or equivalent	14%
Other certificate	5%
Total	100%
N=	950

Source: MERIT, Washington Workforce Registry June 2020.

Table I.8: Job Title by Certificate Attainment

Job Category	Initial Certificate or equivalent	ECE Short Certificate or equivalent	ECE State Certificate or equivalent
Assistant/Aide	24%	25%	18%
Teacher	29%	34%	60%
Director/Manager	18%	17%	15%
Family home assistant/aide	3%	8%	1%
Family home teacher/owner	26%	17%	7%
Total	100%	100%	100%
N=	703	65	135

Source: MERIT, Washington Workforce Registry June 2020.

Table I.9. Job Title by Race/Ethnicity Race

Job Category	White	Hispanic/Latino	Black/African American	Asian
Assistant/Aide	39%	41%	29%	47%
Teacher	34%	30%	21%	30%
Director/Manager	13%	7%	7%	6%
Family Home Assistant/Aide	6%	9%	19%	7%
Family Home Lead Teacher/Owner	8%	13%	23%	10%
Total	100%	100%	100%	100%
N=	17,849	6,759	3,115	2,960

Source: MERIT, Washington Workforce Registry June 2020.

Table I.10. Educational Attainment by Ethnicity/Race

Educational Attainment	White	Hispanic/ Latino	Black/African American	Asian
Pre-Associate's degree	38%	64%	63%	29%
Associate's degree	19%	14%	13%	13%
Working on Bachelor's degree	2%	2%	3%	2%
Bachelor's degree	30%	17%	15%	39%
Post-Bachelor's degree (Working on or attained)	10%	3%	6%	16%
Total	100%	100%	100%	100%
N=	6,505	2,341	913	843

Source: MERIT, Washington Workforce Registry June 2020.

Table I.11: Job Titles by Languages Spoken

Job Category	English Only	English/ Spanish	English/ Other	English/ Somali	Spanish Only
Assistant/Aide	39%	42%	43%	7%	28%
Teacher	35%	31%	28%	2%	12%
Director/Manager	13%	7%	6%	0%	1%
Family Home Assistant/Aide	6%	9%	10%	41%	19%
Family Home Lead Teacher/Owner	8%	11%	13%	50%	41%
Total	100%	100%	100%	100%	100%
N=	24,097	4,965	4,466	924	828

Source: MERIT, Washington Workforce Registry June 2020.

Table I.12: Educational Attainment by Languages Spoken

Languages Spoken	English Only	English/Spanish	English/Other	English/Somali	Spanish Only
Pre-Associate's degree	39%	61%	37%	91%	95%
Associate's degree	20%	15%	15%	3%	2%
Working on Bachelor's degree	2%	2%	2%	0%	1%
Bachelor's degree	30%	18%	32%	4%	2%
Post-Bachelor's degree (Working on or attained)	9%	4%	14%	1%	0%
Total	100%	100%	100%	100%	100%
N=	8,332	1,725	1,308	318	360

Source: MERIT, Washington Workforce Registry June 2020.

Table I.13: Educational Attainment by Age Group

Educational Attainment	29 years and younger	30-39 years	49-49 years	50-59 years	60 years and older
Pre-Associate's degree	44%	39%	45%	52%	49%
Associate's degree	15%	18%	19%	17%	19%
Working on Bachelor's degree	5%	2%	1%	1%	0%
Bachelor's degree	32%	31%	25%	22%	21%
Post-Bachelor's degree (Working on or attained)	3%	10%	11%	9%	11%
Total	100%	100%	100%	100%	100%
N=	2,523	2,980	2,768	2,447	1,407

Source: MERIT, Washington Workforce Registry June 2020.

Table I.14: Job Category by Age Group

Job category	29 years and younger	30-39 years	40-49 years	50-59 years	60 years and older
Assistant/Aide	55%	34%	28%	24%	25%
Teacher	31%	36%	32%	30%	26%
Director/Manager	4%	13%	16%	14%	14%
Family Home Assistant/Aide	7%	8%	8%	8%	14%
Family Home Teacher/Owner	2%	9%	17%	24%	23%
Total	100%	100%	100%	100%	100%
N=	14,114	7,792	5,913	4,898	3,123

Source: MERIT, Washington Workforce Registry June 2020.

Table I.15: Racial/Ethnic Groups by Region - Workforce

Race/Ethnicity	Statewide	Central	Eastern	King / Pierce	North-west	Olympic Peninsula	South-west
White	50%	29%	61%	42%	59%	67%	72%
Hispanic/Latino	19%	60%	23%	14%	15%	10%	12%
Black/African American	9%	1%	2%	15%	3%	3%	2%
Asian	8%	1%	2%	13%	7%	4%	2%
Other	5%	2%	5%	7%	7%	8%	4%
Unknown	8%	7%	8%	9%	9%	8%	7%
Total	100%	100%	100%	100%	100%	100%	100%
N=	35,782	2,999	4,293	17,673	5,005	3,123	2,580

Source: MERIT, Washington Workforce Registry June 2020.

Table I.16: Racial/Ethnic Groups by Region – Families with Children

Race/Ethnicity	Statewide	Central	Eastern	King / Pierce	North- west	Olympic Peninsula	South- west
White	62%	37%	72%	55%	66%	73%	77%
Hispanic/Latino	15%	42%	15%	11%	12%	11%	10%
Black/African American	4%	0%	1%	7%	3%	2%	1%
Asian	9%	0%	2%	15%	9%	3%	2%
Other	11%	19%	10%	11%	10%	10%	9%
Total	100%	100%	100%	100%	100%	100%	100%

Source: American Community Survey, 2019.

Table I.17: Educational Attainment by Region

Educational Attainment	Central	Eastern	King / Pierce	North- west	Olympic Peninsula	South- west
Pre-Associate's degree	68%	46%	40%	44%	45%	42%
Associate's degree	13%	17%	16%	20%	22%	24%
Working on Bachelor's degree	2%	3%	2%	2%	2%	2%
Bachelor's degree	12%	26%	32%	26%	24%	25%
Post-Bachelor's degree (Working on or attained)	4%	8%	11%	8%	7%	7%
Total	100%	100%	100%	100%	100%	100%
N=	1,343	1,697	5,332	1,735	910	1,071

Source: MERIT, Washington Workforce Registry June 2020.

Table I.18: Languages Spoken by Region

Languages Spoken	Central	Eastern	King and Pierce	North- west	Olympic Peninsula	South- west
English	40%	76%	61%	74%	89%	85%
English/Spanish	43%	16%	11%	12%	5%	9%
English/Other	2%	3%	19%	12%	5%	6%
English/Somali	0%	0%	5%	<1%	0%	0%
Spanish	15%	4%	1%	1%	<1%	<1%
Other/Unknown	1%	1%	2%	1%	1%	<1%
Total	100%	100%	100%	100%	100%	100%
N=	2,998	4,293	17,670	5,003	3,123	2,580

Source: MERIT, Washington Workforce Registry June 2020.