



Estes Valley Childcare Needs Assessment and Strategic Plan

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Town of Estes Park

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Table of Contents

| | |
|---|-----------|
| Introduction | 3 |
| Context | 4 |
| Definitions..... | 6 |
| Summary of Key Findings from the Estes Valley Childcare Needs Assessment | 7 |
| Childcare Strategic Plan | 12 |
| Strategic Plan Framework..... | 12 |
| Priority Goals and Strategies..... | 13 |
| Priority Actions and Metrics of Success | 14 |
| Childcare Needs Assessment..... | 27 |
| Community Profile..... | 27 |
| Existing Licensed Childcare Supply | 37 |
| Family Needs and Preferences..... | 45 |
| Estimated Unmet Need for Childcare: Now and Moving Forward | 61 |
| Family Focus Group Findings | 66 |
| Employer Experiences | 69 |
| Provider Experiences, Barriers, and Challenges | 70 |
| Conclusion | 72 |
| The Impact of Inadequate Childcare for the Estes Valley..... | 72 |
| Looking Forward and Measuring Success | 74 |
| References | 75 |

Introduction

In Fall 2023, the consulting firms Groundswell for Good and Melton Strategic Solutions (“the consulting team”) were selected by the Town of Estes Park through a competitive Request for Proposal (RFP) process to conduct a needs assessment and create a strategic plan for the use of 6E lodging tax funds to support increased access to childcare for the local workforce. The request noted that the last childcare needs assessment was published in 2018. Since that time, the Estes Valley has seen demographic shifts and the passage of ballot measure 6E (which increased the lodging tax to provide financial support for workforce housing and childcare). An updated housing needs assessment and strategic plan was completed in January 2023 in part to help guide the use of 6E funds for housing. This report is designed to support strategic decision-making to increase access to childcare supports for the workforce.

Overall, through the needs assessment process, the consulting team confirmed that childcare capacity in the Estes Valley is insufficient to meet the needs of the local workforce, and families and their employers are struggling to make it work. In particular, there is an acute shortage of care for infants and toddlers, school-age children (including after-school, summer, and school days off), and off-hours care (evenings and weekends). To increase the supply of childcare in the Estes Valley, it is recommended that 6E funding be used to:

- improve the quality of childcare jobs to recruit and retain additional staff;
- maintain and expand facility capacity;
- increase funding to providers through both private-pay tuition and subsidy payments;
- support affordability for families with tuition assistance; and
- target funding to the identified areas of highest need.

Process

The consulting team began work in October 2023. The Town of Estes Park identified a group of community partners who were invited to participate in collaborative leadership meetings throughout the process. This group provided feedback on materials, helped recruit participants for data collection, and shaped and prioritized the strategies for inclusion in the strategic plan. The following organizations were represented in the community partner group through meeting participation, interviews, or both:

- Boys & Girls Club of Larimer County
- Country Kids Daycare
- Crossroads Ministry
- Estes Park Chamber of Commerce
- Early Childhood Council for Larimer County (ECCLC)
- Estes Park Housing Authority
- Estes Park School District/Park Place Preschool
- Estes Valley Recreation and Park District
- EVICS Family Resource Center
- Family Advisory Coalition
- Larimer County
- Mountaintop Childcare
- The Rainbow Kids
- Town of Estes Park
- Visit Estes Park
- YMCA of the Rockies
- Individual childcare providers and potential providers

The needs assessment and strategic plan was developed with this group’s support. A full draft of this report was distributed to the community partner group and all survey and focus group participants for feedback, and this feedback was incorporated prior to finalizing the plan.

Introduction

Context

6E Funding

In 2022, voters in the Visit Estes Park Local Marketing District approved an increase to the lodging tax. This increased tax does not have a sunset date, and 90% is dedicated to addressing childcare and housing challenges for the local workforce. In 2023, the funding for these programs was approximately \$5 million, and the 2024 Funding Plan dedicates 12% or approximately \$625,000 to childcare purposes, with an additional \$300,000 rolled over from 2023. These funds were prioritized for tuition assistance, addressing workforce challenges, out-of-school programming, and capital and facilities. The Town of Estes Park manages the funds and employs a Housing and Childcare Manager who is responsible for administration.



Licensed Childcare Shortages

Across the country, childcare is in short supply, with the number of children who need care far exceeding the amount of licensed care available.¹ A community is considered a licensed childcare desert when there are three or more children who need care for every licensed slot.² More than half of the U.S. population lives in a community classified as a licensed childcare desert, and the Estes Valley meets this definition for infant and toddler care.³

In recent years, the cost of childcare has increased at a significantly faster rate than inflation, the number of licensed centers has remained relatively stable, and the number of licensed home-based providers has declined significantly.⁴

The shortage of licensed childcare options has been identified as one cause of the current labor shortages being experienced in many industries across the country.⁵ Childcare shortages typically present a greater barrier for women to reenter or remain in the workforce after they have children.⁶

In general, childcare presents a very difficult business model. The majority of the costs to provide care are personnel-related due to health and safety regulations that require adult-to-child ratios that are appropriate for the ages of the children. Due to the lower ratios for very young children, the tuition paid by parents cannot cover the full cost of care, and providers typically rely on the tuition paid for older children and/or outside sources of funding to cover costs.⁷

Policy Context

The recommendations in this report were developed based on an evaluation of the current needs and circumstances in the Estes Valley as of spring 2024. However, it is important to note that several pending policy changes at the state and federal levels could impact the needs and recommendations identified.

Colorado Child Care Assistance Program (CCCAP) and Child Care and Development Fund (CCDF)

The Colorado Child Care Assistance Program (CCCAP) is the state childcare subsidy program funded by the federal Child Care and Development Fund (CCDF) of the Child Care and Development Block Grant (CCDBG), along with state and local matching funds. In early 2024, there were some rule changes made to CCDF, and in May 2024, Colorado passed legislation that adopts some changes for CCCAP.^{8,9} These changes mean that in the next few years, CCCAP will:

- limit an eligible family’s copay to no more than 7% of their income;
- pay providers weekly and in advance based on the number of children enrolled rather than their attendance; and
- utilize grants and contracts for underserved populations, including children in underserved geographic areas, infants and toddlers, children with disabilities, and families needing care during nontraditional hours.

Additionally, the state of Colorado has had an “alternative rate methodology” approved by the federal government. This means that the state will shift away from paying a market rate to using a cost of care model to determine CCCAP reimbursement rates for providers. This shift will increase the amount providers receive per child enrolled in CCCAP starting in October 2024.

CCCAP is typically only able to serve fewer than 10% of eligible children, and in early 2024, Larimer County implemented a freeze on CCCAP due to a lack of funds.^{10,11} Changes in federal rules and the alternative rate methodology will both improve CCCAP for families and providers. However, unless additional state and/or federal funding is allocated for these changes, the number of families served by CCCAP will decrease. This will increase the need for local funding to support families with affording childcare.

FAMLI¹²

Colorado’s Family and Medical Leave Insurance Program (FAMLI) benefits became available in January 2024. The FAMLI Act was passed in 2020 and provides up to 12 weeks of leave per year for the birth or adoption of a child (among other eligible events). Most employers who have employees or are based in Colorado are required to participate in FAMLI (with some exceptions for public entities). As this program is fully implemented and utilized by employees, the Estes Valley may see slight decreases in the need for infant care.

Other Efforts

As outlined previously, childcare shortages are impacting communities across the country and across Colorado. As a result, there are many different state and national efforts underway that attempt to address many of the same challenges identified through this needs assessment. These efforts have the potential to impact (positively or negatively) the childcare needs in the Estes Valley and could create a need for updates to this plan.

Introduction

Definitions

The definitions below are used in this document. Some terms may be used differently in other contexts. When this document uses a term differently (because of childcare licensing definitions, for example), this difference is noted in the text.

Childcare: Someone other than a parent cares for a child under 13, and this care allows the parent(s) to work, seek work, or attend school.

Childcare workforce: The people who take care of children who are not their own in a licensed or unlicensed setting.

Staff: A person who works for a business that provides childcare.

Provider: A business that provides childcare services.

Family childcare: Licensed childcare that is provided in a home environment.

Center-based childcare: Licensed childcare that is in a non-home environment.

School-age care: Care for school-age children that is consistent, regular, ongoing, and aligned with working parents' schedules; may be licensed or not. This report discusses three types of care for school-age children:

- after-school care: Care provided after school during the school year;
- summer care: Care provided during the summer months when school is not in session; and
- care on school days off: Care provided during the school year on weekdays when school is not in session (e.g., holiday breaks, professional development days, etc.).

Family, Friend, and Neighbor (FFN) or informal care: Childcare that is exempt from licensing because the provider is caring for four or fewer children.

Infant: Under 12 months.

Toddler: 12 months to 2.5 years old.

Preschool: 2.5 to 5 years old and has not yet entered kindergarten.

School-age: 5 years old in kindergarten to 13 years old.

Introduction

Summary of Key Findings from the Estes Valley Childcare Needs Assessment

Background and Overview of Methods

The consulting team conducted a comprehensive needs assessment to understand the existing childcare landscape in the Estes Valley and the needs of families and providers. The needs assessment included:

- a review and analysis of demographic and economic data on the Estes Valley;
- data collection on existing licensed childcare options in the Estes Valley;
- a survey of Estes Valley families designed to assess their childcare needs, experiences, and preferences;
- a series of in-person focus groups with families living or working in the Estes Valley;
- interviews with licensed and informal childcare providers;
- one-on-one meetings with community partners;
- an informal questionnaire and interviews with employers; and
- a questionnaire for childcare and preschool program staff.

The findings from each of these methods are outlined in detail in the full needs assessment included in this report, beginning on page 27. Below is a high-level overview of key findings from the methods outlined above, as well as estimates of current and future demand for childcare. Additional details on these estimates can also be found in the full needs assessment.

Demographic and Economic Context

- As of the 2020 Census, the Estes Valley was home to 1,679 children under 18. An estimated 427 children were under age 5; 725 were between the ages of 5 and 12; and 527 were between the ages of 13 and 17.
- In 2020, children under 18 made up 14% of the total population of the Estes Valley.
- Several data sources point to a declining child population in the Estes Valley and within the Town of Estes Park.
- Births to Estes Valley residents have fallen by nearly 30% since the last childcare needs assessment was published in 2018. Enrollment in the Estes Park School District has also fallen, dropping by 10% compared to pre-pandemic levels.
- Approximately 62% of children under 6 and 81% of children ages 6 to 17 live in families in which all available parents are in the labor force.

Existing Licensed Childcare Options

- At the time of this writing, there are six licensed childcare providers in the Estes Valley: two childcare centers, two family childcare homes, one school-based preschool program, and one neighborhood youth organization.
- The number of licensed childcare providers has declined since the previous childcare needs assessment was published in 2018.
- Existing licensed childcare options for children under 6 have capacity to serve 140 children, down from 170 in the 2018 needs assessment. There is an acute shortage of care for infants and toddlers (children under age 2.5).

Introduction

- Capacity for school-age children is more difficult to quantify due to the range of options families with school-age children may employ to meet their childcare needs (e.g., an after-school program like the Boys & Girls Club, after-school clubs, sports, Recreation District programming, etc.). For the purposes of this report, school-age childcare capacity includes providers that operate in a similar manner to childcare for other ages and whose schedule accommodates working parents. Many parents use other options such as lessons or clubs to meet their childcare needs outside of school hours. These types of options have not been quantified for the purposes of this report. The Boys & Girls Club is the only licensed provider serving school-age children during the school year, and they have the capacity to serve 40 children at a time. The Estes Valley Recreation and Park District provides after-school programming for 12 children in kindergarten and first grade. During the summer, the Boys & Girls Club can serve 70 children. YMCA of the Rockies also offers summer programming for school-age children. They are licensed to serve up to 300 school-age children, and the daily average number of children served who are local to Estes Park is 93.

Family Survey Results

- The Estes Valley Childcare Family Survey collected data from Estes Valley parents and families with children under the age of 13 to assess their childcare needs, experiences and preferences. The survey was conducted via SurveyMonkey and was available in English and in Spanish. It received 204 valid responses, including 26 responses in Spanish.
- Approximately 67% of respondents with children under age 6 who were not yet in kindergarten reported that their child was in some form of non-parental care during a typical week.
- Among this group, the most commonly reported setting used was a licensed childcare center or preschool. An adult family member who was not the child's parent was the second-most commonly reported setting. However, settings varied by age group. Respondents with infants and toddlers were much more likely than those with preschool-age children to report relying on informal care (e.g., care provided by a family member) or to report that their child was cared for by their parent or guardian in combination with some other form of care.
- Among respondents with children under 6 whose child was not in any form of non-parental childcare, the most commonly cited reason was cost, with 57% reporting it as a barrier to care. The inability to find a spot, difficulty finding someone they trust, and choosing to stay home with their children were also common reasons reported by families.
- When asked whether they would use childcare if it were available to them at a cost they could afford, 93% of those whose children were not in any form of care said "yes" or "maybe." Licensed childcare centers or preschool programs were the most preferred option among this group, followed by licensed home-based providers.
- Approximately 57% of respondents with a school-age child reported that their child was in some form of non-parental childcare (excluding school) during the week. Among this group, an after-school program was the most commonly used form of care, followed by an adult family member who is not the child's parent.
- Among respondents whose school-age child was not in any form of non-parental childcare, the most commonly cited reason was that the adults in the household adjusted their work schedules to care for their children. Cost and the inability to find care for the hours they needed it were other commonly reported barriers among this group of respondents.

Introduction

- When asked whether they would use childcare if it were available to them at a cost they could afford, 87% of respondents not currently using care for their school-age child said “yes” or “maybe.” The most preferred option among this group was an after-school program, followed by care provided by a family member other than the child’s parent and a drop-in option that could be used flexibly.

Focus Group Themes

- In partnership with the Town of Estes Park and EVICS Family Resource Center, the consulting team held three focus groups with families living or working in the Estes Valley. Two focus groups were conducted in English, and one was conducted in Spanish.
- Focus group conversations highlighted how childcare challenges are straining families both financially and emotionally. Estes Valley families – especially those with infants and toddlers for whom childcare options are scarce – are making immense sacrifices and piecing together care to make things work in the absence of sufficient childcare options.
- Participants also discussed the acute need for care for infants and toddlers under 2.5 years old. Families spoke about facing years-long waitlists for care for their babies or toddlers.
- Many parents struggle to find care for their children during the summer or on days off from school, since some providers who care for young children follow the school district calendar.
- Families – especially those whose children are not currently in any form of childcare – cite affordability as a barrier to care. Many parents who stayed home with their children expressed a desire for at least a few days per week of childcare but felt the cost of care would be equivalent to or more than any income they could earn.
- Parents employed in the hospitality and tourism industries struggle to find care in the evenings and on weekends. No licensed providers in the Estes Valley are open past 5:30 p.m., and only one family childcare home provider is open on Saturdays – leaving parents who work in hotels, restaurants, or other tourism-related industries in a bind. This challenge emerged among Spanish-speaking families, in particular.

Provider and Staff Perspectives

- The consulting team interviewed each licensed provider operating in the Estes Valley, as well as one informal care provider and one former provider. Conversations focused on challenges providers face related to operating a childcare program in the Estes Valley, barriers to operating or expanding, and support providers would find helpful. Staff at center- or school-based programs were also invited to complete a questionnaire designed to understand their experiences working for childcare providers in the community.
- Providers noted strong demand for infant care and insufficient options in the community.
- Among center- or school-based providers, hiring and staffing is a top concern and a barrier to being able to serve more children. Providers noted that low wages, inability to find housing, and the inability to find childcare for staff’s own children are significant barriers to recruiting and retaining staff.
- Half of the childcare staff who responded to the staff questionnaire said housing challenges have affected their ability to work in the Estes Valley.
- Approximately 58% of childcare staff respondents said they had considered working in another community.

Introduction

Current and Future Demand for Childcare: Gap Analysis

Using secondary demographic data on the population of children and families in the Estes Valley, data on existing licensed childcare options, and data on childcare needs and preferences from the family survey, the consulting team developed estimates of current and future demand for childcare in the community. Demand for childcare is influenced by several factors, some of which (e.g., trends in the birthrate or economic conditions) are difficult to predict. These estimates are the best available based on existing data, but it is important to note that broader economic and demographic trends, as well as state- and federal-level policy changes, will influence the level of demand for childcare in future years.

Current Demand for Childcare

The table below summarizes the number of additional slots required in licensed settings to meet current demand for childcare among families with children under 6 living or working in the Estes Valley.

See the full needs assessment later in this report for important information regarding assumptions and caveats related to these estimates.

| Age Group | Existing Licensed Capacity | Estimated Additional Full-Time Spots to Meet Demand |
|---|----------------------------|---|
| Infants and toddlers (children under 2.5) | 22 | 64 |
| Preschoolers (ages 2.5 to 4)* | 118 | 18 |

* These estimates are based on a definition of preschoolers that includes children ages 2.5 to 4 years old. Some 5-year-olds who are not yet in kindergarten may also be enrolled in preschool. If 5-year-olds were included in the model, it would increase the number of estimated additional full-time slots needed.

The current need for additional school-age care is more difficult to estimate due to challenges with determining the capacity provided by existing options in the community. These challenges are discussed in the full needs assessment. Estimates for unmet need for care for school-age children should be used as a guidepost, rather than a specific target number of spots.

The below table includes estimates of current unmet need for childcare among families with school-age children, segmented by time of year and amount of care needed.

| Time of Year | Existing Licensed Capacity for School-age Children | Estimated Additional Spots to Meet Demand | |
|---------------|--|---|--|
| | | Scenario One (Families who Need Care Three Days Per Week) | Scenario Two (Families who Need Care Five Days Per Week) |
| School year | 52 | 164 | 46 |
| Summer months | 163 | 191 | 106 |

Introduction

Future Demand for Childcare

The estimates of current need detailed on the previous page were used to forecast how the demand for childcare could change in future years based on population changes under two scenarios. The first scenario assumes that recent population trends (those observed between the 2010 and 2020 Decennial Censuses) continue into the future. The second scenario takes into account investments in workforce housing and goals for the number of additional housing units identified in the most recent Housing Needs Assessment and Strategic Plan.

The below tables summarize the projected additional need for care (above licensed capacity in spring 2024), based on each of these scenarios. Additional detail on the methodology is included in the full needs assessment.

Scenario One: Forecasted Additional Need for Childcare

| Age Group | Additional Slots Needed in 2027 (Above Existing 2024 Capacity) | Additional Slots Needed in 2030 (Above Existing 2024 Capacity) |
|--|---|---|
| Infants and toddlers | 61 | 60 |
| Preschoolers | 16 | 15 |
| School-age: | | |
| <i>School year, at least 3 days per week</i> | 164 | 163 |
| <i>School year, at least 5 days per week</i> | 46 | 46 |
| <i>Summer, at least 3 days per week</i> | 190 | 190 |
| <i>Summer, at least 5 days per week</i> | 105 | 105 |

Scenario Two: Forecasted Additional Need for Childcare, with Workforce Housing Investments

| Age Group | Additional Slots Needed by 2030 (above existing 2024 licensed capacity, assuming 550 new dwelling units) | Additional Slots Needed by 2030 (above existing 2024 licensed capacity, assuming 700 new dwelling units) |
|--|---|---|
| Infants and toddlers | 69 | 71 |
| Preschoolers | 22 | 23 |
| School-age: | | |
| <i>School year, at least 3 days per week</i> | 179 | 183 |
| <i>School year, at least 5 days per week</i> | 50 | 51 |
| <i>Summer, at least 3 days per week</i> | 211 | 217 |
| <i>Summer, at least 5 days per week</i> | 117 | 120 |

Childcare Strategic Plan

With input from the community partner group, the following framework was developed for the 2024 strategic plan.

Strategic Plan Framework

VISION

Working families have consistent access to childcare that allows them to live, work, and thrive in the Estes Valley.

VALUES

Childcare should be:

affordable · high quality · reliable · financially sustainable for providers and staff · culturally responsive

AND

meet families' needs · give families choice



Childcare Strategic Plan

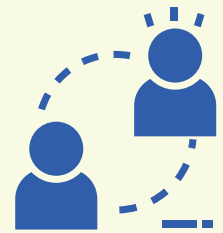
Priority Goals and Strategies

The following goals and strategies were identified as the highest priority for increasing access to childcare in the Estes Valley.

GOAL 1

Retain existing staff and recruit new staff and providers.

- A. Make the Estes Valley a great place to work in childcare.
- B. Increase the number of new childcare staff.
- C. Facilitate housing stability for providers and staff.
- D. Strengthen infrastructure and support for FFN providers.



GOAL 2

Increase and maintain facility capacity.

- A. Provide funding for facility costs.
- B. Utilize existing spaces as childcare facilities.
- C. Support the development of family childcare homes.



GOAL 3

Support the retention of new and existing providers through financial sustainability while maintaining affordability for families.

- A. Develop a layered funding model for providers that will cover the full cost of providing care.
- B. Help childcare businesses to increase revenue and/or decrease costs.



GOAL 4

Increase childcare capacity in areas of highest need.

- A. Create a system of incentive payments that incentivizes an increase in areas of highest need.
- B. Pursue employer-based childcare options.



Childcare Strategic Plan

Priority Actions and Metrics of Success

Below, metrics of success are identified for each goal and then priority actions are articulated for each strategy.

Goal 1: Retain existing staff and recruit new staff and providers.

Across the United States, there is a growing shortage of people in the childcare workforce, and the Estes Valley is no exception. To increase the supply of licensed childcare available in the Estes Valley, it will be critical to implement strategies that support the retention of the existing staff and the development of new staff in home settings, center- and school-based childcare, and school-age programs. In addition, it is important to note that nationally the shortage of childcare workforce seems to be correlated with an increase in cases of abuse and neglect in childcare settings. It will be critical to ensure that efforts to increase staffing do not decrease the quality of care provided by maintaining high standards for training, qualifications, and support of staff.

Metrics of Success

| | |
|-------------|---------------------------------------|
| Baseline | 27 childcare staff (for children 0-5) |
| 2027 Target | 35 |
| 2030 Target | 42 |

An increase in the number of school-age staff is also a critical success measurement. For several reasons, a count of the number of school-age staff is less representative. Therefore, it is recommended to partner with school-age programs to track changes in staffing on a per-program basis as a measure of success.

Strategy 1A: Make the Estes Valley a great place to work in childcare.

Throughout the needs assessment process, the need to improve the quality of childcare jobs was consistently identified as a priority. Many different frameworks identify the factors that contribute to job quality and are worthy of consideration. For example, [Results for America](#)¹³ identifies eight interconnected principles that define a good job: earnings, schedules, safety and security, purpose and meaning, environment and culture, benefits, learning and development, and voice and representation. Improving the quality of childcare jobs is the best way to recruit and retain childcare staff.

Implement a \$25 per hour minimum wage for childcare staff.

In 2024, MIT identified the living wage for a single adult with no children in Larimer County as \$24.52 per hour.¹⁴ Childcare staff need to be able to meet their basic needs, which means earning at least the minimum living wage of \$25 per hour. To encourage this wage for all staff, the Town should make a \$25 per hour minimum wage a requirement for participation in 6E funding programs, and funding from 6E should be made available to support an increase or wage supplements, in combination with other funding sources (see strategy 3A below). While family childcare providers do not typically earn an hourly wage, it will be important to ensure that family childcare providers are compensated adequately through layered funding to earn an equivalent salary.

It is important to consider that the implementation of a minimum wage for staff will be primarily implemented by childcare providers. This can pose a challenge for many reasons including concerns about sustainability. Many public programs have opted to address these challenges by providing ongoing wage supplements or stipends directly to staff rather than encouraging or requiring providers to increase wages. This could be an initial transitional step in implementing this plan. However, neither model (increased wages nor wage supplements and stipends) is without challenges. A wage supplement program is not typically delivered as a monthly payment,

Childcare Strategic Plan

it is not usually provided in the same manner as a paycheck, it requires additional administration, and any subsidies that do not include an increase in private-pay tuition risk inequitable subsidies for higher income families. In summary, a program to increase wages is preferred, but a supplement or stipend program would achieve similar goals and could be considered as a first step.

Investigate opportunities to provide access to health care for childcare staff.

If childcare work is going to be seen as a viable profession within the community, then staff need the ability to meet their basic needs, including health care. There are several promising models for providing access to health care that are worth investigating. For example, Early Childhood Options in Summit County contracts with their Federally Qualified Health Center, and all early childhood staff in the community have access to basic health care, dental care, and mental health visits for a flat annual fee.¹⁵ A similar arrangement with Salud Family Health should be investigated.

Create staff retention bonuses.

Celebrating commitment to and longevity in the profession of childcare will help to increase recruitment and retention. 6E funds should be used to support incentive payments based on years of service in childcare. This will also serve as a wage supplement for providers. One example to draw from is San Miguel County's LIFT-EC program,¹⁶ which offers a wage supplement directly to childcare staff for every six months of consecutive employment.

Create opportunities for time off and work-life balance.

One of the significant challenges of providing childcare – both in a center and in an in-home setting – is that it is very difficult to take time off. The creation and management of a pool of qualified substitutes would encourage both family childcare home and center providers to take time off when they need it. In Colorado, there is a specific license for a substitute placement agency which could be obtained by whoever takes on management. If the substitute pool is subsidized, then providers can provide paid time off (PTO) for their staff or themselves without significant additional costs.

When staff members are absent, providers can struggle to maintain mandatory adult-to-child ratios. An alternative to providing substitutes would be providing financial support to help providers staff to lower ratios so that when they are missing some staff, they still have the personnel available to maintain legally required ratios without substitutes. For example, a provider could be supported to hire an additional staff member so that there are three teachers for 10 infants and then when one is unavailable, the legally required 1:5 ratio could easily be maintained.

Create programs that value and celebrate childcare workers.

Programs that are designed to celebrate childcare workers as professionals and help them connect with one another will support a sense of belonging and connection to encourage childcare providers to remain in the field and stay in the Estes Valley. This could include appreciation/recognition activities, regular networking events, or other ideas generated by providers and staff. Some of these activities have been completed by EVICS in the past and could be supported and/or expanded to increase impact. Engaging a leadership group of providers and staff in the community could create additional connections and ensure that strategies are co-created to be meaningful and relevant for providers.

Childcare Strategic Plan

Strategy 1B: Increase the number of new childcare staff.

Recruiting local residents to become early childhood educators is an important strategy for increasing the early childhood workforce. People with a connection to and roots in the community will be more likely to stay long-term than those recruited from outside the community. The creation of a workforce pipeline or “grow your own” programs can help to encourage interested high school and college students to join the early childhood workforce. It will be important to combine these strategies with those listed above to increase job quality so that early childhood is seen as a desirable profession for local graduates.

There are some important differences to note between the requirements for different types of childcare staff. Anyone working with children ages 0-5 must complete the training activities required by Colorado childcare licensing standards. Those who work in the public-school setting will have requirements from the Colorado Department of Education and/or the school district. Those who work with school-age children have fewer mandatory training requirements from the state, and this work is typically less than full-time, occurring on afternoons/evenings, on school days off, and/or during the summer. These differences mean that there may be different groups of people from which to hire. A school-age position or early childhood position may be a good fit for a high school or college student, while someone who wants full-time work may be a better fit for an early childhood position, for example. The actions below are recommended to support all settings, and where one is more aligned with a specific setting, that is noted.

Expand the P-TEACH program to include early childhood.

The Estes Park School District’s P-TEACH (Pathways to Teaching) program is a Career and Technical Education dual enrollment program that offers high school credit, career education, and certification to help high school students become K-12 teachers. Expanding this program (or developing a similar program) to support high school students to receive the credentials necessary to become early childhood staff would create a new pipeline of opportunities to train and retain new childcare staff in the Estes Valley. Combining this with paid internships (below) would encourage students to enroll in the program.

Create a paid internship program for childcare.

Provide paid internship opportunities for high school and college students either through the P-TEACH program (above) or separately to encourage students and recent graduates to receive the required credentials and remain in the childcare field. Paying stipends for experienced mentors who support interns is another possibility that would improve compensation and professional advancement opportunities for childcare staff.

Recruit community members for supplemental work in school-age care or as substitute teachers.

There are several segments of the community who may be good candidates to support staffing needs for school-age care and/or occasional care as substitute teachers. High school or college students often have schedules that align with the needs of school-age care, some retirees may be interested in serving as substitute or seasonal teachers, and some parents may be looking for part-time work. The creation of a recruitment and training program for each of these groups would help to bring them into the workforce. Including an incentive payment for completing training and/or after working a certain number of hours would likely increase interest as well.

Investigate options for utilizing J-1 and H-2B visas.

The Estes Valley has many workers who come to the community on temporary visas to work seasonally. A local program could help sponsor J-1 or H-2B visas for childcare and identify quality applicants. J-1 and H-2B visas have different requirements. They would not be used for staffing a childcare center, but both can be used by families to hire nannies or au pairs. J-1 visas can also be used to hire seasonal camp counselors.

Childcare Strategic Plan

Strategy 1C: Facilitate housing stability for providers and staff.

Childcare staffing shortages are inherently connected with housing access, and focused efforts to support housing for childcare staff will be critical to increasing childcare supply. If childcare staff do not have access to housing in the Estes Valley, childcare workforce shortages will continue to exacerbate the childcare shortage. In the needs assessment, it was clear that housing is a challenge for childcare staff.

Create a program for rental and/or down payment assistance for childcare staff.

A rental or down payment assistance program will help childcare providers have access to stable housing and support their financial well-being. This program would build on existing workforce mortgage and rent assistance programs by specifically targeting resources to childcare staff.

Identify opportunities to create housing that is dedicated to childcare staff.

As new development occurs in the Estes Valley, there will be places where creating housing for childcare staff may be an option. These should be explored and funded as opportunities arise. This may include building housing that is specifically designed for or dedicated to childcare staff. Dormitory style workforce housing could support seasonal staff or be a stepping stone for longer-term employees. Housing for staff that is co-located with new childcare centers may be another option. Strategy 2C (below) also outlines a strategy for supporting family childcare providers with housing.

Connect providers with housing opportunities.

Support for childcare staff to navigate housing options should be developed. Navigation services could help to support access to affordable housing waitlists, opportunities for short- or long-term housing options, and rental and down payment assistance. There could also be opportunities to seek out mission-aligned landlords and property owners to provide housing for childcare providers that is not otherwise on the market.

Strategy 1D: Strengthen infrastructure and support for FFN providers.

Across the country, Family, Friend, and Neighbor (FFN) care is the most prevalent form of non-parental care.¹⁷ In Colorado, a person can care for up to four children without a childcare license (with no more than two being under the age of 2). This type of care is license-exempt, it is legal, and it can be a good fit and high-quality setting for many families. While it is not recommended to support illegal care, this type of unlicensed, legally exempt care is an important part of the childcare ecosystem in the Estes Valley and supports the local workforce just as much as licensed care. Therefore, it is recommended that resources be committed to supporting access to this type of care.

Childcare Strategic Plan

Create a network for FFN providers.

Because FFN care is not subject to regulation by the state and because many people providing this type of care would not identify as childcare providers, it is difficult to know who they are or connect them with resources. The creation of a hub or network for providers would help to support this important segment of childcare providers. For example, such a network could:

- provide access to training to support health, safety, and quality of care. This might include CPR, child development, etc.;
- connect providers with state programs that can provide them with funding such as CCCAP (tuition assistance) and CACFP (food reimbursement);
- provide parents with the opportunity to access local tuition assistance if their license-exempt provider is participating in the network;
- consider how a substitute system could support FFN providers; and
- host formal training programs such as PASO¹⁸ (a training program for FFN providers that is offered in Spanish).

Goal 2: Increase and maintain facility capacity.

In the needs assessment and strategic planning process, facilities were identified as a challenge for both new and existing providers. Some existing providers lose space when landlords decide not to renew a lease, struggle to keep up with rent or mortgage payments, or don't have the capital required for necessary upgrades, repairs, or expansions. New providers struggle to find adequate space in an appropriately zoned area and have difficulty accessing capital for an update or remodel of an existing space. The strategies below for increasing facility capacity are recommended as actions to work in partnership with and in support of specific providers. Building facilities alone will not increase childcare capacity, and any facility-focused strategies should be completed in conjunction with the other actions recommended in this plan.

| | Family Childcare Homes total capacity | Center-based infant (Under 12 months) capacity | Center-based toddler (Between 12 months and 2.5 years) capacity | Center-based preschool (2.5 years to 5 years old) capacity | School-Age capacity of childcare/ youth development programs (Kindergarten through age 12) |
|--------------------|---|---|--|--|--|
| Baseline | 14 | 0 | 18 | 108 | School year: 52 Summer: 163 |
| 2027 Target | 26 <i>Add 2 family childcare providers</i> | 10 <i>Add 1 infant room</i> | 32 <i>Add 1 toddler room</i> | 128 <i>Add 1 preschool room</i> | School year: 104 Summer: 228 |
| 2030 Target | 38 <i>Add 2 family childcare providers</i> | 20 <i>Add 1 infant room</i> | 46 <i>Add 1 toddler room</i> | 128 <i>Maintain existing preschool capacity</i> | School year: 125 Summer: 353 |

Childcare Strategic Plan

Strategy 2A: Provide funding for facility costs.

The cost to create or expand a childcare facility is often prohibitive for providers. Access to traditional capital through small business loans, for example, is very limited. In addition, expansion by existing providers represents a significant opportunity to increase capacity, but many lack the resources to do so. Capital funds are needed to enable new and existing providers to make the necessary investments in facilities to support new licensed childcare capacity.

Maintain a capital grants program to support the development, redevelopment, remodel, or expansion of childcare facilities.

The Town's capital grants program should be continued with additional structure and guidelines. A grant fund for capital projects should include criteria for the creation of new facilities, the redevelopment or remodeling of existing facilities, and the expansion of facilities to serve additional children. These funds should be available to individual providers as well as employers who wish to build facilities to support childcare for their employees (see strategy 4B, on page 26).

Create a mortgage and rental assistance program for providers.

After personnel, expenses related to real estate are typically the greatest expense for providers. A program that provides support for any providers who pay rent or a mortgage for their childcare facility can help to offset these expenses and support their financial sustainability. In Eagle County, lodging tax money is used for this purpose, with a monthly cap of \$7,000 for rental or mortgage assistance per provider. Eagle County's program only provides support for center-based providers. It is recommended that the Town of Estes Park also consider including home-based providers. Because home-based providers' mortgage and rent costs are for their residence as well as their business, policies for eligibility for home-based providers may differ from center-based providers (for example, covering only a percentage of rental or mortgage costs, setting the cap on payments lower, etc.)

Strategy 2B: Utilize existing spaces as childcare facilities.

Maintain a list of suitable sites for childcare facilities.

Many spaces in the Estes Valley have been identified as suitable locations for childcare. It is recommended that a list of these spaces be formalized. This list can then be used to share with potential providers. It can also be used to design creative reuse projects, encourage employers to engage in childcare solutions (see Strategy 4B on page 26), and write capital grant requests to outside funders.

Create an incentive fund for the conversion of existing spaces.

An incentive fund could help to bring together public and private partners to collaborate on the conversion of existing spaces into childcare. This fund would be structured as a matching grant to encourage partners to come to the table with ideas for promising projects. This program could be standalone or could exist under the capital grants described above.

Consider zoning changes to support childcare development.

As updates are considered to the Estes Park Development Code, a consideration for childcare should be included. In the needs assessment process, zoning was identified as a barrier for some potential providers. A review of the development code would highlight where challenges exist and help the Town to identify opportunities to support new childcare providers.

Childcare Strategic Plan

Strategy 2C: Support the development of family childcare homes.

Create a start-up fund for family childcare providers.

To meet licensing requirements, new family childcare providers often have expenses related to health and safety improvements such as childproofing, fencing, materials, etc. Grants for these expenses can be relatively modest, but these costs can be very prohibitive for a new provider. In addition, it is ideal for this funding to be provided in advance rather than on a reimbursement basis because cash flow can be a significant challenge for a prospective provider. Examples of this type of program can be found in multiple places including the City of Steamboat Springs and the Colorado Early Childhood Council Leadership Alliance (ECCLA).

Incorporate family childcare homes into new development.

Because a family childcare provider’s home also serves as a childcare center, there are unique opportunities to support both housing and childcare in this setting. As new affordable housing projects are designed, identifying one to two units in new developments to be designed and designated as family childcare would help leverage 6E funds to support both housing and childcare creatively. The [Rural Homes Early Childhood Initiative](#) in Ouray, Colorado is a good example of this model.¹⁹

Goal 3: Support the retention of new and existing providers through financial sustainability while maintaining affordability for families.

| | Infant providers - center | Toddler providers - center | Preschool providers - center- or school-based | School-age providers | Home-based providers |
|-------------|---------------------------|----------------------------|---|-----------------------------|----------------------|
| Baseline | 0 | 1 | 3 | School year: 2 Summer: 2 | 2 |
| 2027 Target | 1 | 2 | 4 | School year: 4 Summer: 3 | 4 |
| 2030 Target | 2 | 3 | 4 | School year: 5 Summer: 4 | 6 |

Strategy 3A: Develop a layered funding model for providers that will cover the full cost of providing care.

In this context, “cost of care” refers to the cost to the provider to pay for the personnel and operational costs associated with providing care for one child. Typically, the tuition parents pay (with or without subsidy) is sufficient to cover this cost for children in preschool or school-age care (although this may vary depending on how well-compensated staff is) and is insufficient for infants and toddlers. In order to create an environment in which childcare providers can operate sustainably and increase stability for Estes Park families, funding that covers the full cost of care for every child should be a priority. Recommendations for each of the available funding sources are detailed in the actions outlined below.

Childcare Strategic Plan

The chart below provides information on cost of care. This is not the amount parents pay, but how much it costs a provider to pay for personnel and operations per child. Estimates for the per-child cost of providing care in Colorado are outlined below. Data specific to Estes Park are not available. For each age group, the cost of care is estimated reflecting the Colorado statewide living wage (\$24.83/hour for one adult with no children). Following are the 2024 daily reimbursement rates for children enrolled in CCCAP in Larimer County and the range of tuition currently charged by providers in Estes Park. The final column estimates the annual difference between current tuition rates and the Colorado cost of care.

| | Cost of Care* (Colorado - daily, with living wage for staff) | CCCAP (Regular - daily) | Tuition (daily)* | Gap (cost of care - current tuition) per child (annual)** |
|-----------------------|---|----------------------------|------------------|---|
| Infant - center | \$98.20 | \$65.56-\$81.13 | N/A | N/A |
| Toddler - center | \$79.85 | \$58.55-\$81.13 | \$44.80-\$55 | \$5,716 |
| Preschool - center | \$66.10 | \$57.55-\$78.69 | \$44.80-\$50*** | \$3,703 |
| Home-Based | \$84.45 | \$38.13-\$52.30 | \$36-\$45 | \$9,074 |
| School-age | \$29.20 | \$25.98 | \$15-\$50 | \$966 |

* Rate conversions (where applicable) based on 20 days per month or five days per week

** Gap calculated based on highest tuition rate and 230 days per year

*** School district preschool tuition is excluded

Layer subsidy and tuition assistance programs.

To support all families and providers, it is important to maximize resources by efficiently layering the available funding sources. The United States Department of Health and Human Services uses 7% of a household's income as an affordability benchmark for parent co-payments.²² It is recommended that the resources get as close to this benchmark as possible. For some families, this may mean they can pay full tuition. For others, one program may cover the necessary amount, and for others, a combination of funding sources will be needed.

Layering of tuition assistance programs is necessary to fully maximize available resources. This work of attempting to blend and braid different public and private programs requires staff resources and a high level of sophistication in policy development and data tracking. Policy development requires a nuanced understanding of the various sources of funding, their differing requirements, how they work together, and cost-modeling. Then, administration of these layered programs requires complex data tracking to ensure that families are accessing programs in the desired hierarchy (e.g., CCCAP first), track private pay tuition rates, calculate gaps between cost of care and reimbursement rates, and ensure that families and providers are not double-dipping or missing out. This administrative work is particularly important for publicly funded tuition assistance (such as 6E funds) due to the level of accountability required for tax dollars, and it can be done in an efficient and cost-effective way once appropriate systems are set up.

Childcare Strategic Plan

Below, details on each source of tuition assistance or subsidy are provided along with recommendations for maximizing and layering.

| Program | Details | Recommended Actions |
|--|---|--|
| Private-pay tuition | As seen above, families in the Estes Valley are charged well below the true cost of care and in some cases, below what CCCAP would reimburse. Providers are not allowed to receive CCCAP reimbursements that are higher than their private-pay rates. In addition, families that could afford to pay higher tuition rates are not being asked to do so. | <ul style="list-style-type: none"> Encourage or require providers to increase their private-pay tuition rates to match the cost of care (at a minimum, tuition should match CCCAP reimbursement rates to maximize use of this funding source). The objective would be for parents who can afford to pay to do so and then all other families would be supported with tuition assistance. This approach is preferred over an approach in which providers receive subsidies without implementing higher tuition rates because such an approach inequitably provides an indirect subsidy for higher-income families. |
| Colorado Child Care Assistance Program (CCCAP) | <p>Families in Larimer County are eligible for CCCAP if their family income is below 235% of the federal poverty level (approximately \$73,320 in annual income for a family of four in 2024) and all parents in the household are working or in other eligible activities. Funding can be used in licensed or qualified license-exempt programs for children up to 13 years old.</p> <p>CCCAP is managed by Larimer County Human Services. The reimbursement rate for CCCAP is set by the state for each county (except for qualified exempt rates which are set by the county) and varies based on the age of the child, Colorado Shines quality rating, provider type, and various other factors (e.g., evening care, care for children with disabilities, and overnight care have higher rates). 2024 rates can be found here.²³</p> <p>Two providers in Estes Park have fiscal agreements with CCCAP, and 26 children were receiving CCCAP subsidies as of February 2024.</p> | <ul style="list-style-type: none"> Implement a “CCCAP first” policy* for other tuition assistance programs. Encourage and support existing and new providers to participate in CCCAP. Support FFN providers who serve eligible families to become “Qualified Exempt,” (register to receive CCCAP reimbursement). <p><i>* Considerations for a “CCCAP first” policy should also include the ability to make exceptions on a limited basis for extenuating circumstances.</i></p> |
| Universal Preschool Colorado (UPK) | <p>Universal Preschool Colorado is a public funding source that provides 15 hours per week of free preschool for all 4-year-old children in the year before kindergarten. Three- and 4-year-olds with certain risk factors can also be eligible for funding supporting up to 30 hours per week.</p> <p>Three providers in Estes Park participate in UPK. The school district provides the majority of slots and has a waitlist for them.</p> | <ul style="list-style-type: none"> Encourage new providers to participate in UPK. |

Childcare Strategic Plan

| Program | Details | Recommended Actions |
|-------------------------------------|--|---|
| Larimer Child Care Fund | <p>This funding is provided by United Way of Larimer County. Families that are not eligible for CCCAP benefits, are working, and have a monthly income that meets the requirements of the program can access this tuition assistance program for children ages 0-5. Families may be placed on a waitlist depending on the availability of funding.</p> <p>One child in Estes Park currently uses this funding source. Two providers in Estes Park are registered with ECCLC to accept this funding source.</p> | <ul style="list-style-type: none"> • Encourage existing and new providers to participate in the Larimer Child Care Fund. • Support increased family awareness of the Larimer Child Care Fund and encourage applications. |
| 6E tuition assistance | <p>The Town provides funding for tuition assistance for families through 6E funding. This program is new and in development. In 2023, 6E funds were awarded to EVICS for the purpose of administering tuition assistance.</p> <p>The primary objective of local tuition assistance is increasing access and affordability for families. To do this, local tuition assistance money is used to stabilize families when they cannot access other funding programs and to address needs that are not met by other funding programs.</p> | <ul style="list-style-type: none"> • Adopt policies to use local tuition assistance to prioritize families who: <ul style="list-style-type: none"> • have a short-term emergency need; • are waiting on a determination for CCCAP; • are eligible for CCCAP but not able to access it due to funding availability; • have an immigration status that does not allow them to access other programs; • exceed income limits for other programs, but still cannot afford care; or • work in a childcare facility. • Implement policies to support provider sustainability: <ul style="list-style-type: none"> • pay for enrollment rather than attendance and/or • cover gaps between true cost of care and CCCAP rates for providers. |
| EVICS tuition assistance | <p>EVICS has provided tuition assistance to families in Estes Park for many years. This program has been funded through donations, grants, and, more recently, 6E funds.</p> <p>This program has operated primarily as a short-term emergency or gap funding program for most families, with some being qualified to participate on a longer-term basis.</p> <p>In addition, in 2023 and 2024, EVICS administered the 6E tuition assistance program on behalf of the Town and the majority of funding for EVICS tuition assistance came from 6E funds.</p> | <ul style="list-style-type: none"> • Adopt policies that complement other funding sources available to families • Continue to support family navigation services for tuition assistance |
| Head Start/ Early Head Start | <p>There are no Head Start programs in Estes Park. The closest Head Start program is in Loveland and is operated by the Thompson School District.</p> <p>To be eligible to participate in Head Start, children must be in families whose income is below the federal poverty level (\$31,200 for a family of four in 2024). Communities the size of Estes Park typically do not have enough qualifying children to operate a Head Start or Early Head Start program.</p> | <p>Estes Park could investigate the possibility of a local Head Start program, but there is a low likelihood of being approved.</p> |

Childcare Strategic Plan

Streamline application processes.

While the layering of multiple subsidy and tuition assistance programs creates a significant opportunity to increase affordability for parents, it can also create a burden when families must navigate different application processes, eligibility requirements, and agencies. Continuing and expanding programs to support the navigation of tuition assistance will be critical to ensuring families have access. Ideally, systems would be developed to consolidate and streamline applications and processes. Because different agencies have different requirements and collect different data, this can present a significant challenge, but it will be worthwhile to pursue these types of collaborative efforts where possible, including consolidated and/or coordinated application processes and outreach to families. It is critical to note that community members will have varying levels of trust with different government and community-based organizations, and these relationships are important to consider in designing streamlined systems so that families are able to interact with organizations they are familiar with and trust.

Strategy 3B: Help childcare businesses to increase revenue and/or decrease costs.

Evaluate the feasibility of shared/centralized services.

All types of providers have a variety of operational and administrative activities that could be consolidated such as bookkeeping, enrollment, billing, building maintenance, waitlists, substitute pools, etc. Providing technology and/or personnel for these shared services would help providers to decrease their overhead expenses and help to support financial sustainability. Additionally, shared services can help to support the three key components of provider sustainability: full enrollment, full fee collection, and revenues cover per-child cost. However, providers are often hesitant to sign on to shared services because they value the autonomy and independence of maintaining these business operations on their own. For this reason, it is recommended that before creating any kind of shared services program, a feasibility analysis be conducted to illustrate the possible cost savings and benefits to providers and collect information on which services providers would be willing to have administered through a shared services program.

Increase providers' access to technical and business supports.

There are many opportunities for technical and business support in Colorado and Larimer County to help new and existing providers navigate licensing, develop strong business plans, and access other types of support to enhance the strength of their operations. These include offerings from ECCLC, the Small Business Development Center, and others. However, throughout the needs assessment, it was clear that providers in the Estes Valley have not historically been connected to these supports. These services do not generally appear to be accessible to Estes Valley providers either because they are provided in locations outside of the Valley or because they are not widely known. Efforts to increase accessibility of these services in the Estes Valley would help support new and existing providers with improved business acumen and sustainability.

Childcare Strategic Plan

Goal 4: Increase childcare capacity in areas of highest need.

In coordination with the strategies recommended above, resources should be targeted to incentivize supply-building in areas identified as highest-need, including care for infants, toddlers, and school-age children and care on weekends and evenings. Care that is targeted to the needs of specific employees in the Estes Valley, especially those with unique needs for childcare, is also recommended as a potential high-impact strategy for increasing capacity.

| | Infant | Toddler | Evening/ weekend | School-age | Employer-based |
|--------------------|--------|---------|---------------------|---------------------------------|----------------|
| Baseline | 4 | 22* | 6 | School year: 52 Summer: 163 | 0 |
| 2027 Target | 18 | 40* | 12 | School year: 104 Summer: 228 | TBD |
| 2030 Target | 32 | 58* | 20 | School year: 125 Summer: 353 | TBD |

* Toddler capacity includes duplicated infant slots in family child care that could be used for infants or toddlers

Strategy 4A: Create a system of incentive payments that incentivizes an increase in areas of highest need.

Through the needs assessment, several areas of care were identified as having the highest unmet need. It is recommended that a set of incentive payments be created (or continued) specifically targeting these areas.

| Identified Area of Need | Recommended Action |
|--|---|
| Infant/toddler | Per-slot incentive payment for the creation of new licensed slots serving 0–2-year-old children. |
| After school | Per-child incentive payment for the creation of new after-school programs serving 5–13-year-old children. |
| School days off | Per-child incentive payment for the creation of programs that will serve children on days when school is out (holidays, professional development days, etc.). |
| Summer | Per-child incentive payment for the creation of programs that will serve children during summer vacation. |
| Nontraditional hours (evening/ weekend) | Incentive payments for programs serving families during evening and/or weekend hours or per-hour incentives for care provided during these times. |

Childcare Strategic Plan

Strategy 4B: Pursue employer-based childcare options.

Because the goal of 6E funding is to support the workforce, it is recommended that funding be used to design solutions that match the specific needs of employees. One of the best ways to do this is to partner with employers to design, create, and support childcare with the specific needs of their employees in mind. Organizations and businesses whose nature necessitates a unique schedule (e.g., education, medical care, accommodations, public works) can be an important partner in meeting those unique needs by offering childcare for their employees. Local resources can also be layered with other resources like the [Colorado Employer-Based Child Care Grant](#).²⁴

Create a grant program for employers who design and create childcare solutions that support the specific needs of their employees.

Employers who choose to design childcare programs for their employees should be supported with a grant program. The grant program could be designed to support any or all stages of development including needs assessment, feasibility analysis, program or construction design, construction, and operation.

Pursue partnerships and/or design funding opportunities with large employers to create childcare solutions for their employees.

If large employers in the community design childcare solutions that meet the unique needs of their employees, this would help to support retention of employees and free up some of the capacity at other providers. Encouraging participation and soliciting partnerships from large employers in the community would help to facilitate these projects. A formal program could be designed, or these efforts could be completed more informally. As a large employer, the Town could also consider offering its own childcare option for employees.

Childcare Needs Assessment

Community Profile

The following section includes key demographic and economic indicators on the Estes Valley population of children and families. These data and trends provide important context for the childcare needs assessment and strategic plan. Wherever possible, data are provided for the Estes Valley, the Town of Estes Park, Larimer County, and Colorado. For the purposes of the needs assessment, the Estes Valley is defined as the Estes Park R-3 School District and includes the Town of Estes Park, as well as Pinewood Springs, Glen Haven, Drake, Allenspark, and other unincorporated areas of Larimer County within the geographic boundaries of the Estes Park School District.

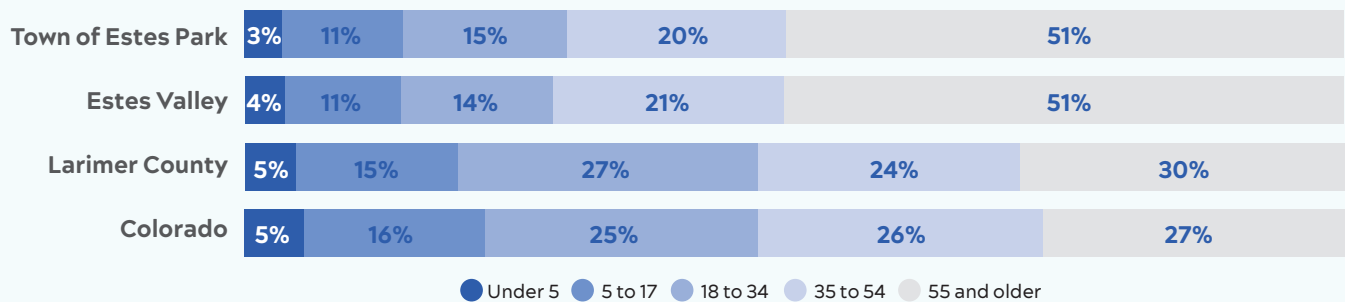
Population by Age

As of the 2020 Census, the Estes Valley was home to **1,679 children under 18**.²⁵ Approximately half of these children lived within the Town of Estes Park. An estimated **427 children under 5** lived in the Estes Valley, and 46% of these children lived within the Town of Estes Park.²⁶

In 2020, children under 18 made up 14% of the total population of the Estes Valley, a much lower percentage than in Larimer County, where children make up nearly 20% of the total population, or in Colorado as a whole, where children make up 21% of the total population.²⁷ In contrast, older adults make up a much higher share of the Estes Valley population than in Larimer County or Colorado. Adults 55 and older made up more than half of the Estes Valley and Town of Estes Park populations in 2020, compared to 30% of the Larimer County population and 27% of the Colorado population.²⁸

CHILDREN UNDER 18 MAKE UP A MUCH SMALLER PORTION OF THE ESTES VALLEY AND ESTES PARK POPULATIONS THAN IN LARIMER COUNTY OR COLORADO AS A WHOLE.

Age distribution for select geographies, 2020

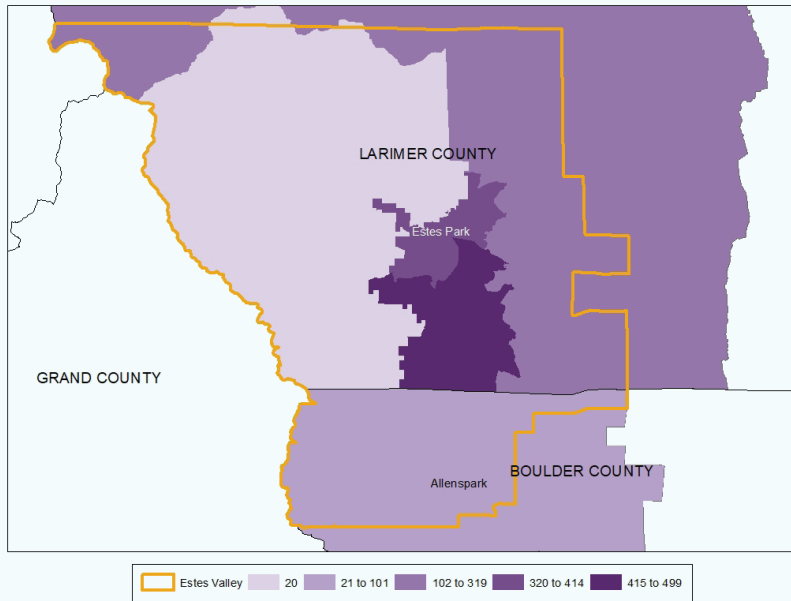


Source: U.S. Census Bureau, 2020 Decennial Census.

Childcare Needs Assessment

Child Population by Census Tract

CHILDREN UNDER 18 BY CENSUS TRACT, 2020



The adjacent map shows which areas of the Estes Valley have the highest concentrations of children under 18. As of the 2020 Census, the census tracts south of Estes Park had the largest population of children in the region, with 499 children under 18.²⁹

Source: U.S. Census Bureau, 2020 Decennial Census.

Recent Trends in the Child Population of the Estes Valley

Several data sources point to a declining child population in the Estes Valley since 2010, with the Town of Estes Park seeing faster decreases than the Estes Valley as a whole. Between the 2010 and 2020 Decennial Censuses, the number of children under 18 in the Estes Valley fell by 5%, declining by 94 children. Within the Town of Estes Park, the child population fell by 14% during the same time period.³⁰

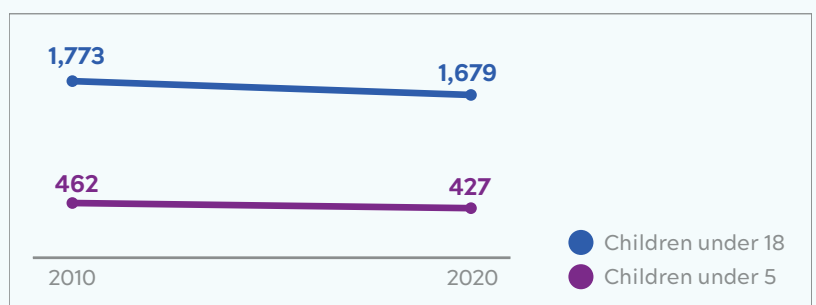
The number of young children under 5 fell even more steeply between 2010 and 2020, dropping by 8% in the Estes Valley and by nearly 30% within the Town of Estes Park.³¹ In contrast, the total population in the Estes Valley increased slightly between 2010 and 2020. This overall increase was driven by a significant jump in the population of adults ages 55 and older. Between 2010 and 2020, the number of older adults increased by nearly 16%.³²

Although it is not possible to determine whether or how the childcare landscape influences child population changes in the Estes Valley, population trends are important for the Town of Estes Park to monitor as it implements strategies to meet families' childcare needs.

THE NUMBER OF CHILDREN UNDER 18 LIVING IN THE ESTES VALLEY FELL BY 5% BETWEEN THE 2010 AND 2020 CENSUSES. THE NUMBER OF CHILDREN UNDER 5 FELL BY 8%.

Child population changes, 2010 to 2020: Estes Park School District

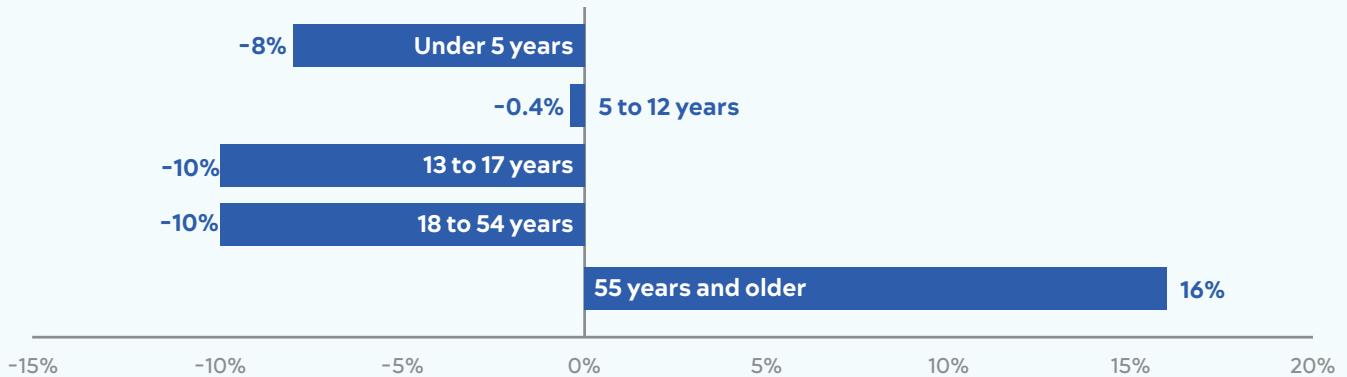
Source: U.S. Census Bureau, 2010 and 2020 Decennial Census.



Childcare Needs Assessment

THE POPULATION OF ADULTS AGES 55 AND OLDER IS THE ONLY AGE GROUP THAT INCREASED IN SIZE IN THE ESTES VALLEY BETWEEN 2010 AND 2020.

Percent change in population by age group in the Estes Park School District, 2010 to 2020



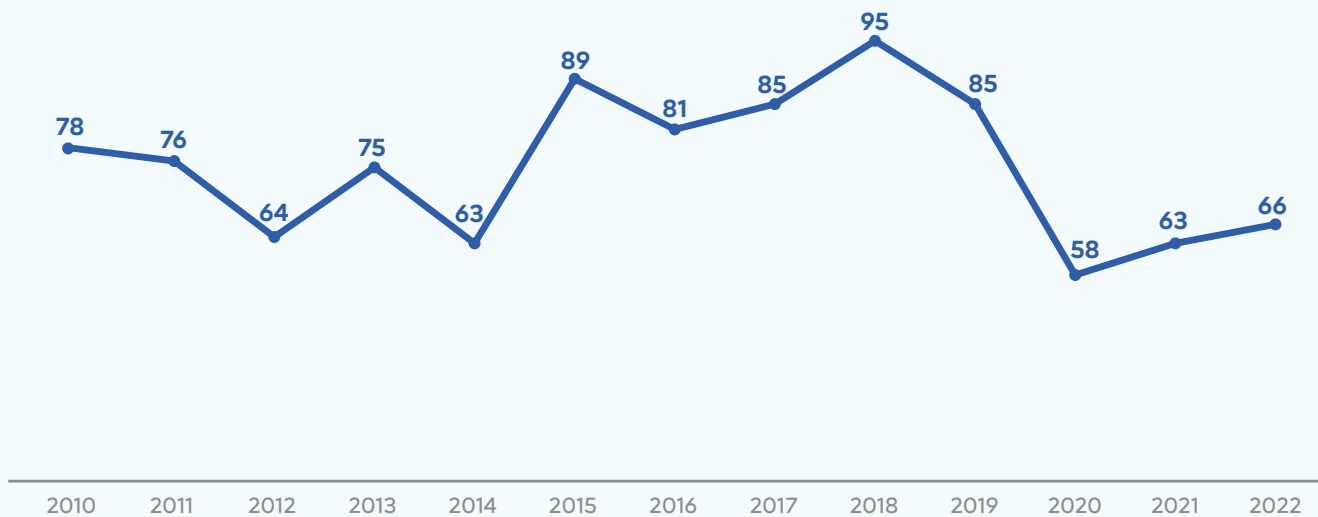
Source: U.S. Census Bureau, 2010 and 2020 Decennial Census.

Live Births

Recent data show a steep decline in the number of births to Estes Valley families since the last childcare needs assessment was published in 2018. **Between 2018 and 2022, the number of births occurring to residents of the Estes Valley fell by more than 30%.**³³ The decline in births in the Estes Valley was significantly larger than in Larimer County or statewide. During the same timeframe, Larimer County births fell by 7%, while the state saw a 1% decrease in births.³⁴

SINCE THE LAST CHILDCARE NEEDS ASSESSMENT WAS PUBLISHED IN 2018, BIRTHS TO ESTES VALLEY RESIDENTS HAVE FALLEN BY 30%.

Live births to Estes Valley residents, 2010 to 2022



Source: Colorado Department of Public Health and Environment, Vital Statistics Program.

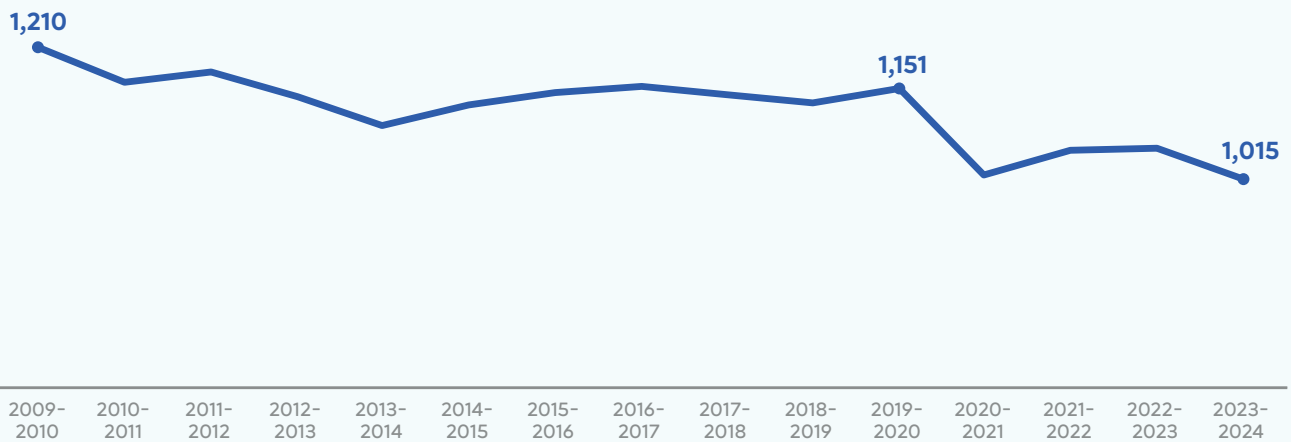
Childcare Needs Assessment

PK-12 School Enrollment

In alignment with broader child population trends, Estes Valley schools have also seen enrollment declines in recent years. The number of students enrolled in the Estes Park School District has fallen by nearly 12% (136 students) since the start of the COVID-19 pandemic.³⁵ Other school districts in the region (Boulder Valley, Poudre and Thompson) have also seen declines in enrollment, but none has experienced a decline as large as the Estes Park School District.³⁶

SCHOOL ENROLLMENT IN ESTES PARK HAS DECLINED BY MORE THAN 10% FROM PRE-PANDEMIC LEVELS.

PK-12 enrollment in the Estes Park school district, 2009-10 to 2023-24



Source: Colorado Department of Education.

TABLE: CHANGES IN SCHOOL DISTRICT ENROLLMENT, 2019-20 TO 2023-24

| School District | Percent Change in PK-12 Enrollment, 2019-20 to 2023-24 |
|--------------------------------|--|
| Estes Park School District | -12% |
| Boulder Valley School District | -9% |
| Thompson School District | -7% |
| Poudre School District | -3% |

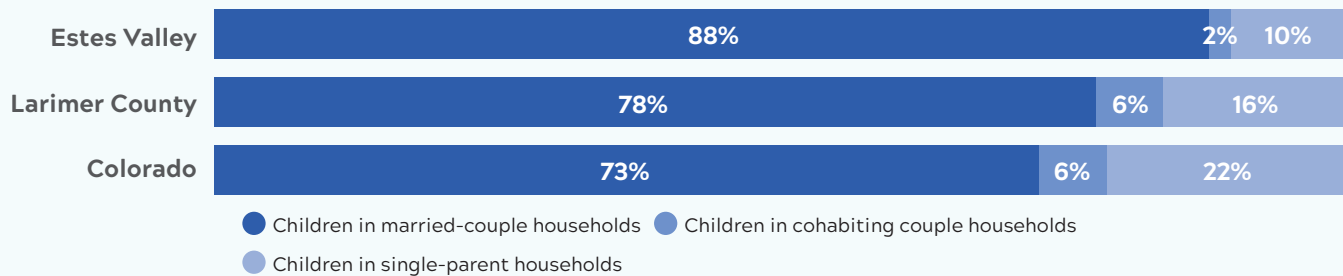
Childcare Needs Assessment

Household Type

Approximately 16% of all households in the Estes Valley included one or more children under 18 in 2018–2022, statistically unchanged from 2013–2017.³⁷ Most children in the Estes Valley (88%) live in married-couple households.³⁸ Approximately 10% live in single-parent households, and 2% live in cohabiting couple households.³⁹

THE SHARE OF CHILDREN LIVING IN MARRIED-COUPLE HOUSEHOLDS IS HIGHER IN THE ESTES VALLEY THAN IN COLORADO AS A WHOLE.

*Children under 18 by household type, 2018–2022**



Source: U.S. Census Bureau, 2018–2022 American Community Survey 5–Year Estimates.
 *Data for the Town of Estes Park are not included for this indicator due to a large margin of error for some family types.

Child Population by Race/Ethnicity and Language Spoken at Home

The majority of children in the Estes Valley are White.⁴⁰ Nearly one-third are children of color.⁴¹ Approximately 23% of Estes Valley children are Hispanic or Latino; 5% are multiracial; and 2% are Asian.⁴² Black or African American children, American Indian or Alaska Native children, and Native Hawaiian or Pacific Islander children each make up less than 1% of the child population in the region.⁴³ The Town of Estes Park is more diverse than the Estes Valley, with children of color making up approximately 43% of the Town’s child population.⁴⁴ More than 5% of Estes Valley children speak a language other than English at home, with Spanish being the most common language among this group.⁴⁵

WHITE CHILDREN MAKE UP THE MAJORITY OF CHILDREN IN THE ESTES VALLEY, AND HISPANIC CHILDREN MAKE UP NEARLY ONE-QUARTER.

Children under 18 in the Estes Valley by race/ethnicity, 2020



Source: U.S. Census Bureau, 2020 Decennial Census.

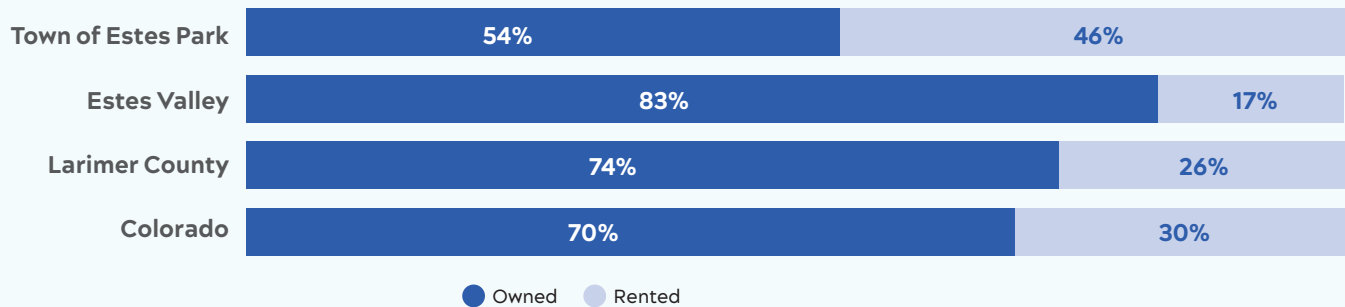
Childcare Needs Assessment

Housing Tenure

Most households with children under 18 in the Estes Valley are owned (83%), a higher share than within the Town of Estes Park, where only 54% of households with children are owned.

HOMEOWNERSHIP RATES AMONG HOUSEHOLDS WITH CHILDREN ARE HIGHER IN THE ESTES VALLEY THAN IN THE TOWN OF ESTES PARK.

Housing tenure among households with related children under 18 for select geographies, 2018-2022



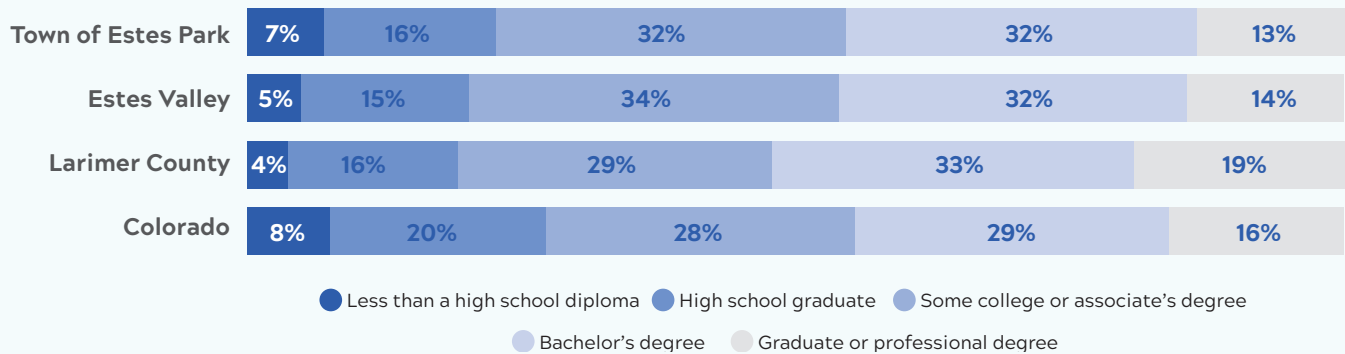
Source: U.S. Census Bureau, 2018-2022 American Community Survey 5-Year Estimates.

Educational Attainment

Educational attainment among working-age adults (ages 25 to 64) in the Estes Valley resembles statewide educational attainment. Approximately 46% of adults ages 25 to 64 in the Estes Valley had a bachelor's degree or higher, compared to 45% of adults statewide.

EDUCATIONAL ATTAINMENT AMONG WORKING-AGE ADULTS IN THE ESTES VALLEY RESEMBLES EDUCATIONAL ATTAINMENT STATEWIDE.

Educational attainment among adults ages 25 to 64 for select geographies, 2018-2022



Source: U.S. Census Bureau, 2018-2022 American Community Survey 5-Year Estimates.

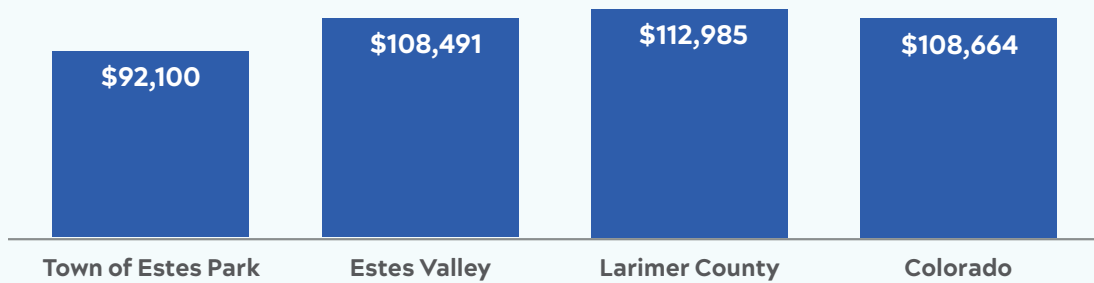
Childcare Needs Assessment

Median Income and Income Distribution of Estes Valley Families

According to 5-year American Community Survey estimates for 2018-2022, **median family income in the Estes Valley was \$108,491**, up from \$78,487 in 2013-2017. It is important to note that the Census Bureau definition of “family” includes any household in which members are related by birth, marriage or adoption, meaning estimates of family income include households that consist of married adults without children.

MEDIAN FAMILY INCOME IN THE ESTES VALLEY IS ON PAR WITH THE STATEWIDE AVERAGE.

Median family income for select geographies, 2018-2022

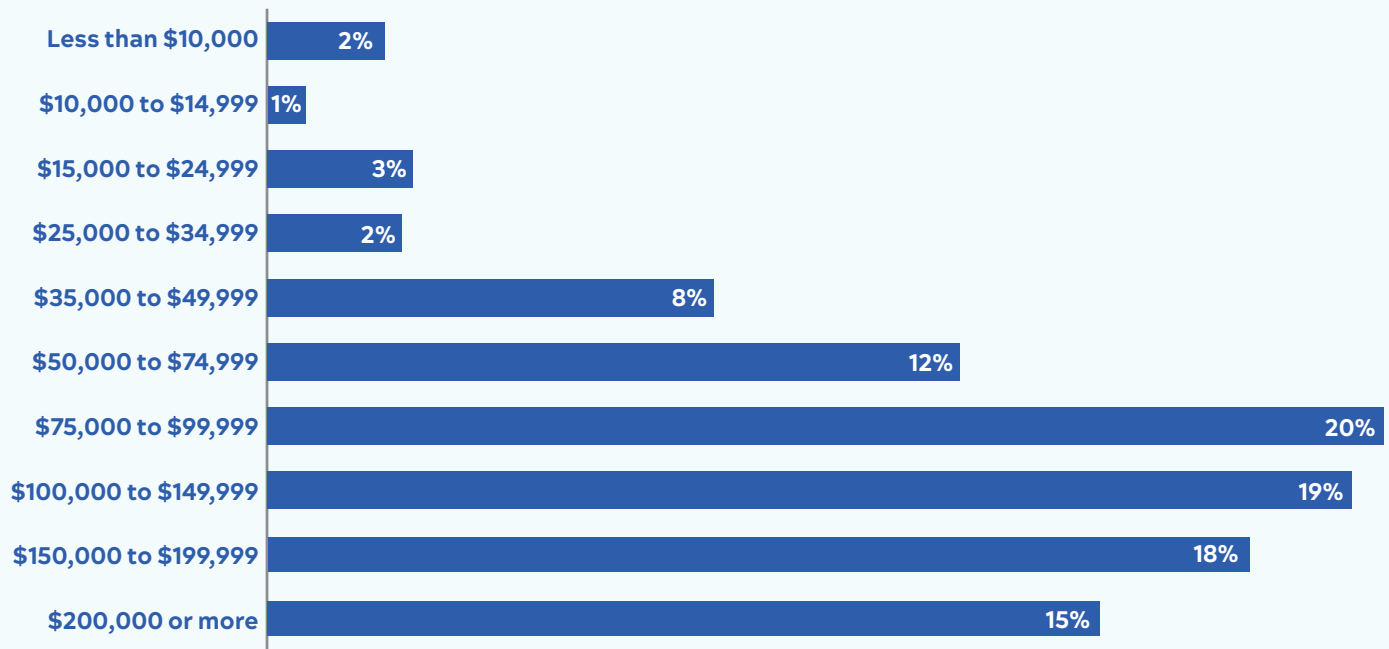


Source: U.S. Census Bureau, 2018-2022 American Community Survey 5-Year Estimates.

Nearly half of all Estes Valley families had incomes below \$100,000 per year according to the most recent data available, with the largest share earning between \$75,000 and \$99,999. Approximately 16% had incomes below \$50,000 per year.

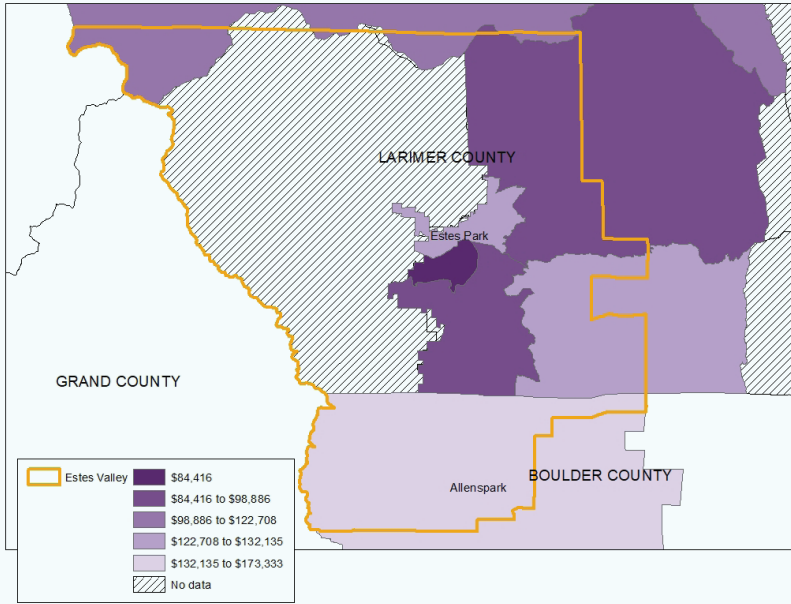
NEARLY HALF OF ALL FAMILIES IN THE ESTES VALLEY EARN LESS THAN \$100,000 PER YEAR.

Income distribution among families in the Estes Park School District, 2018-2022



Source: U.S. Census Bureau, 2018-2022 American Community Survey 5-Year Estimates.

Childcare Needs Assessment



Within the Estes Valley, median family income ranged from \$84,416 to \$173,333 per year.⁴⁸ The southern portion of Estes Park had the lowest median family income between 2018 and 2022.⁴⁹

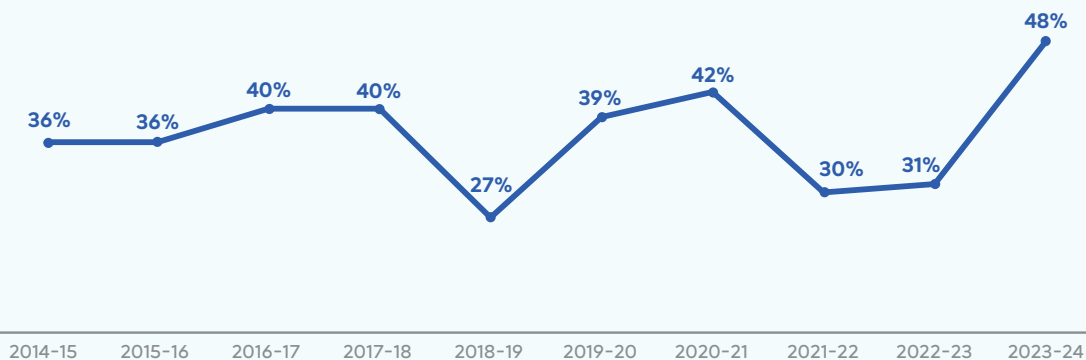
Children in Poverty or Low-Income Families

The most recent available data from the U.S. Census Bureau’s American Community Survey estimate that 8% of children in the Estes Valley lived in poverty between 2018 and 2022.⁵⁰ This number should be interpreted with caution, however, due to a large margin of error.

Data from the Colorado Department of Education indicate that a far higher share of children in the Estes Valley live in families with low incomes. **More than 42% of students in the Estes Park School District qualified for free lunch in the 2023-2024 school year, meaning they lived in families earning less than 130% of the federal poverty level** (approximately \$40,560 in annual income for a family of four in 2024).⁵¹ An additional 6% of students qualified for reduced-price lunch because their families earned between 130% and 185% of the federal poverty level (between \$40,560 and \$57,720 per year for a family of four). **In other words, nearly half of all Estes Valley students lived in low-income families in 2023-2024.**

IN THE 2023-2024 SCHOOL YEAR, NEARLY HALF OF ALL STUDENTS IN THE ESTES PARK SCHOOL DISTRICT QUALIFIED FOR FREE OR REDUCED-PRICE LUNCH, MEANING THEIR FAMILIES EARNED LESS THAN 185% OF THE FEDERAL POVERTY LEVEL (APPROXIMATELY \$57,720 PER YEAR FOR A FAMILY OF FOUR).

Percent of Estes Park School District students qualifying for free or reduced price-lunch, 2014-15 to 2023-24



Source: Colorado Department of Education.

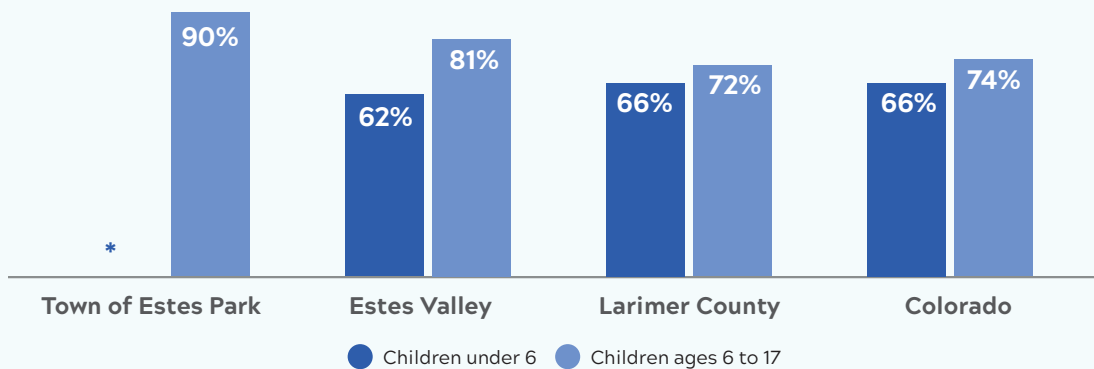
Childcare Needs Assessment

Labor Force Participation

Childcare is critical to ensuring families can secure stable employment. On average, between 2018 and 2022, **62% of Estes Valley children under 6 lived in households where all available parents were in the labor force** – on par with the statewide average of 66%.⁵² **Among school-age children (ages 6 to 17) in the Estes Valley, 81% lived in households in which all parents were working**, which was not statistically different from the statewide average of 74%.⁵³

ABOUT TWO-THIRDS OF YOUNG CHILDREN AND MORE THAN THREE-QUARTERS OF SCHOOL-AGE CHILDREN IN THE ESTES VALLEY LIVE IN FAMILIES WHERE ALL PARENTS ARE IN THE LABOR FORCE.

Percent of children with all available parents in the labor force for select geographies, 2018-2022

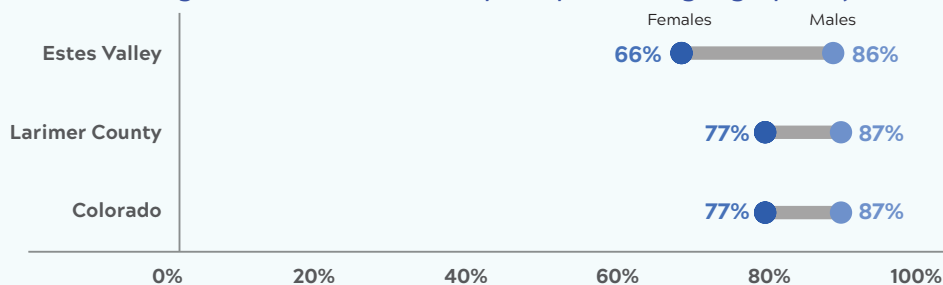


Source: U.S. Census Bureau, 2018-2022 American Community Survey 5-Year Estimates, Table DP03.
 *Data for children under 6 were suppressed for the Town of Estes Park due to a large margin of error.

Although the share of children with all parents in the labor force in the Estes Valley is similar to the Colorado average, labor force participation among women in the Estes Valley is lower than the rate for women statewide. Only 66% of females ages 20 to 64 were in the labor force between 2018 and 2022, compared to 77% in Colorado as a whole.⁵⁴ The gap between labor force participation rates for women and men is also significantly larger in the Estes Valley. **The labor force participation rate for working-aged women in the Estes Valley was 20 percentage points lower than the rate for men – a gap twice as large as the gaps at the Larimer County and state levels.** Although it is not possible to conclude that this gap is caused by a shortage of childcare in the Estes Valley, research shows that caregiving responsibilities are a significant barrier to women’s labor force participation.⁵⁵

THE LABOR FORCE PARTICIPATION RATE AMONG FEMALES AGES 20 TO 64 IS MUCH LOWER IN THE ESTES VALLEY THAN IN LARIMER COUNTY OR COLORADO, AND THE GAP IN LABOR FORCE PARTICIPATION RATES BETWEEN FEMALES AND MALES IS TWICE AS LARGE.

Percent of females and males ages 20 to 64 in the labor force for select geographies, 2018-2022



Source: U.S. Census Bureau, 2018-2022 American Community Survey 5-Year Estimates..

Childcare Needs Assessment

Employment by Industry

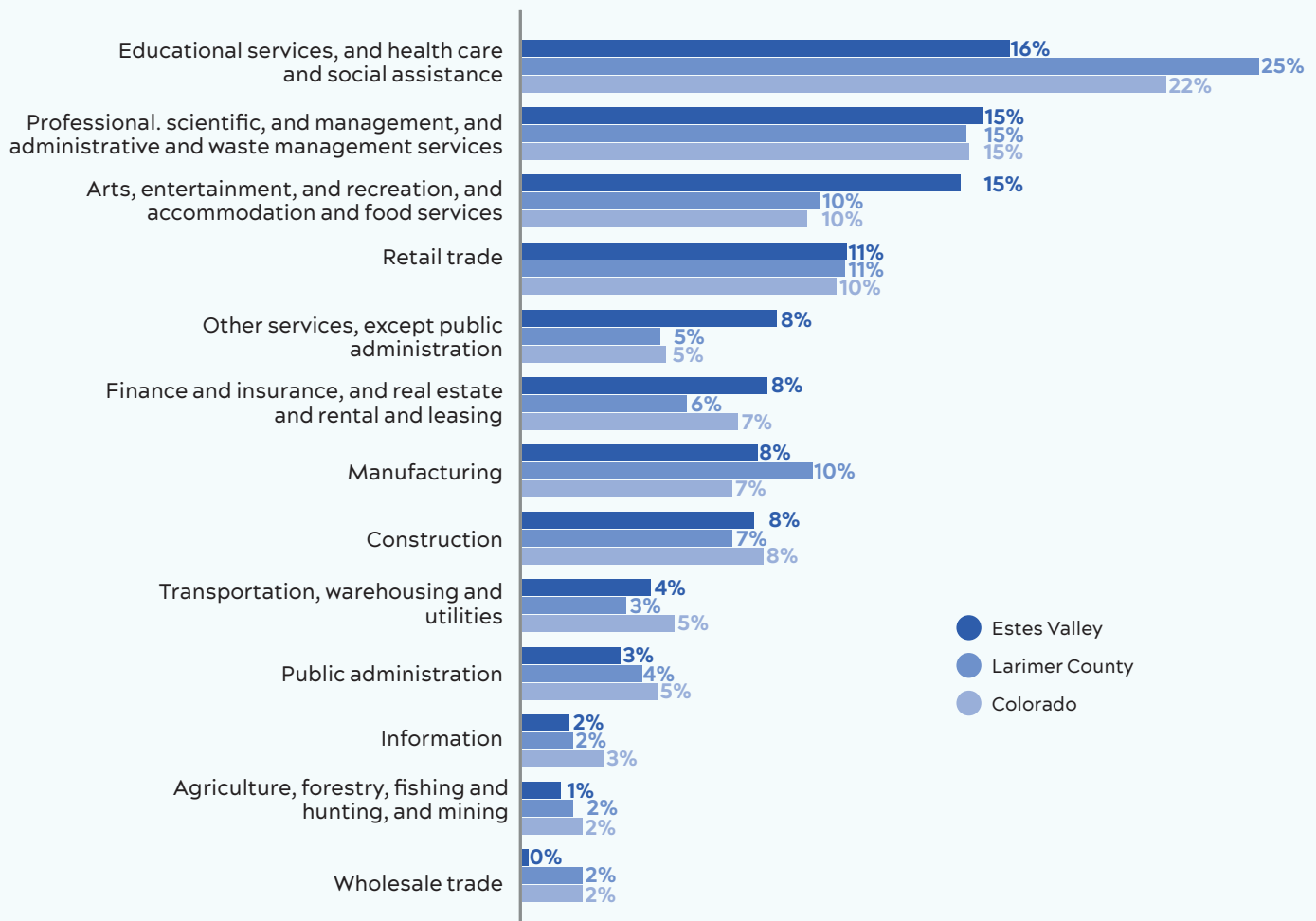
Between 2018 and 2022, the most common industries in which Estes Valley workers were employed were:

- educational services, health care and social assistance (16%);
- professional, scientific, and management services (15%); and
- arts, entertainment, recreation, accommodation and food services (15%).⁵⁶

Estes Valley residents were more likely to work in recreation, accommodation and food services than residents in Larimer County or Colorado as a whole, reflecting the importance of tourism to the local economy. People working in these industries are more likely to have non-traditional work schedules that require work in the evenings or on weekends, presenting challenges for finding childcare.

MORE THAN ONE IN SEVEN ESTES VALLEY RESIDENTS IS EMPLOYED IN RECREATION, ACCOMMODATION OR FOOD SERVICES. EMPLOYEES IN THESE INDUSTRIES OFTEN WORK NON-TRADITIONAL HOURS, WHICH CAN MAKE FINDING CHILDCARE DIFFICULT.

Percent of the civilian employed population 16 years and over employed in each industry, 2018-2022



Source: U.S. Census Bureau, 2018-2022 American Community Survey 5-Year Estimates..

Childcare Needs Assessment

Existing Licensed Childcare Supply

The following section includes data on the existing supply of licensed childcare in the Estes Valley collected from Colorado’s childcare licensing database and supplemented by data collected directly from providers where needed. These data were used to inform the estimates of childcare demand in the subsequent section of the report.

The needs assessment process revealed that many families in the Estes Valley use informal or license-exempt providers to meet their childcare needs. Quantifying the availability of care through informal care providers (grandparents, friends, neighbors, etc.) is not possible using existing datasets, however, and informal care was excluded from estimates of childcare supply and demand. More information on the use of informal or license-exempt care in the Estes Valley is available in the section of this needs assessment focused on family survey results.

Existing Licensed Childcare Options

Providers and Provider Types

As of May 2024, the Estes Valley is home to six licensed childcare providers: two childcare centers, two family childcare homes, one preschool program and one neighborhood youth organization. This marks a steep decline since the previous childcare needs assessment identified 10 licensed providers in the Estes Valley when it was published in 2018. Much of the decline in providers between 2018 and 2024 was concentrated among licensed family childcare homes. The 2018 needs assessment identified six licensed family childcare home providers; by 2024, only two remained in operation. Both licensed childcare centers and one preschool program identified in the 2018 needs assessment remained in operation as of May 2024. See the table on page 44 for a detailed breakdown of the characteristics of current providers.

TABLE: CHANGES IN LICENSED CHILDCARE PROVIDERS, 2018 TO 2024*

| Providers Included in 2018 Needs Assessment | Provider Type | Licensure Status as of Spring 2024 |
|---|-----------------------|---|
| Mountaintop Childcare | Childcare center | Open |
| Bennett Preschool at YMCA of the Rockies | Childcare center | Open and has since expanded to serve toddlers |
| Enchanted Circle | Family childcare home | Closed |
| Country Kids | Family childcare home | Open |
| Happy Kids Club | Family childcare home | Converted to license-exempt |
| Ponderosa Play School | Family childcare home | Closed |
| Rainbow Kids | Family childcare home | Open |
| Rose Childcare | Family childcare home | Closed |
| Life Long Learning Preschool | Preschool program | Closed |
| Park Place Preschool | Preschool program | Open |

* In addition to the providers listed above, another licensed family childcare home provider opened in 2023 and closed before the end of the year. The Boys & Girls Club was not included in the previous childcare needs assessment but remains open in 2024.

Childcare Needs Assessment

Capacity and Enrollment

Children under 6

At the time of this writing in May 2024, licensed Estes Valley childcare providers serving children under 6 had capacity to serve 140 children – down nearly 18% from 170 children when the previous childcare needs assessment was published in 2018.

TABLE: LICENSED CHILDCARE OPTIONS FOR CHILDREN UNDER 6

| Provider Name | Provider Type | Ages served | Capacity | Enrollment |
|---|-----------------------------|---|------------|------------|
| Country Kids | Large family childcare home | Infants, toddlers, preschoolers | 8 | 10* |
| Mountaintop Childcare | Childcare center | Preschoolers | 40 | 38 |
| Park Place Preschool (Estes Park School District) | Preschool program | Preschoolers | 48** | 48 |
| Rainbow Kids | Family childcare home | Infants, toddlers, preschoolers, school-age | 6 | 5 |
| Bennett Preschool (YMCA of the Rockies) | Childcare center | Toddlers, preschoolers | 38*** | 32 |
| Total licensed capacity for children under 6 | | | 140 | |

* Enrollment at Country Kids exceeds capacity because some children split the week.

** Sixteen of the 48 spots at Park Place Preschool are half-day slots for 3-year-olds.

*** According to facility licensing, Bennett Preschool at YMCA of the Rockies can serve 47 children. However, they cap enrollment at 38 during the school year.

Capacity varies significantly by age group, with the most limited capacity for infants and toddlers. Below is more detailed information on childcare options and licensed capacity for infants, toddlers, and preschoolers, as well as a set of definitions for each age group referenced in the needs assessment.

Licensing regulations use overlapping age group definitions to allow providers flexibility to determine the right setting for children based on their developmental needs and abilities. For the purposes of this needs assessment, however, the following definitions are used when referring to children under age 6:

- **Infants:** Under 12 months
- **Toddlers:** 12 months to 2.5 years
- **Preschoolers:** 2.5 years to 5 years old and not yet in kindergarten

Infants

The only licensed childcare options for infants in the Estes Valley are family childcare homes; there are no center-based childcare settings for infants in the community. Unless they seek a special license, most family childcare homes can serve a maximum of two children under age 2, meaning there is a **maximum of four infant slots** to serve the entire population of infants who need care in the Estes Valley. At the time of this writing, all infant slots were filled, and both family childcare home providers reported infants on their waitlists. With an average of about 60 babies born in the Estes Valley each year in recent years, there are approximately 15 babies for each licensed infant care slot. A community with more than three children per licensed childcare slot is often considered a “childcare desert.”⁵⁷

Childcare Needs Assessment

Toddlers

Childcare options for toddlers in the Estes Valley include both center-based and home-based settings. Bennett Preschool at YMCA of the Rockies has capacity for 18 toddlers. The two family childcare homes in the Estes Valley could serve a maximum of two young toddlers each (using the same slots that could also serve infants) to align with the two under age 2 limit required by licensing regulations, for a **total of 22 potential toddler slots** in the community. There are an estimated 138 children ages 1 to 2.5 in the Estes Valley, meaning there are an estimated six toddlers per licensed toddler slot. At the time of this writing, Bennett Preschool at YMCA reported four toddler spots open for the fall of 2024.

Preschoolers

Preschoolers in the Estes Valley can be served in center-based, home-based, or school-based settings. Mountaintop Childcare is licensed for 40 preschool slots, and Park Place Preschool, operated by the Estes Park School District, can serve a maximum of 48 children.^a For most of the year, Bennett Preschool at YMCA of the Rockies serves 20 preschoolers, but they expand to serve additional preschoolers in the summer months. The Estes Valley's two licensed family childcare homes could collectively serve a maximum of 10 preschoolers, assuming each is also serving two children under age 2. In total, there are **118 potential preschool slots** in the Estes Valley. There are an estimated 218 preschool-age children (ages 2.5 to 4 years old) for approximately 1.8 children per preschool slot. At the time of this writing, there were two slots open for preschool-age children at Mountaintop and one preschool-age slot open at one family childcare home provider. Bennett Preschool and Park Place Preschool were both operating at maximum capacity for preschool-age children and reported children on their waitlists.

School-age children

Childcare capacity for school-age children is more difficult to quantify due to different licensing regulations and the range of options families with school-age children may employ to meet care needs during the hours they are not in school (e.g., after-school programs, clubs, after-school sports, etc.). Licensed capacity for school-age children does not reflect all available options for school-age care.

^a Sixteen of the 48 spots at Park Place Preschool are half-day slots for 3-year-olds.

Childcare Needs Assessment

For the purposes of this needs assessment, school-age care is defined as care that is consistent, regular, ongoing, and aligned with working parents' schedules, regardless of a program's licensed status. The table below shows existing capacity in programs that meet this definition. Capacity is segmented for two time periods: the school year and the summer.

TABLE: LICENSED CHILDCARE OPTIONS FOR SCHOOL-AGE CHILDREN*

| Provider Name | Provider Type | Ages served | Capacity | Enrollment |
|---|---------------------------------|---------------------------------------|---------------------------------|-------------------------------|
| Boys & Girls Club | Neighborhood youth organization | Ages 6 to 18 | School-year: 54** Summer: 70 | School-year: 40 Summer: 70 |
| YMCA of the Rockies | School-age childcare center | Ages 6 to 18 | Summer: 300*** | Summer: 93 |
| Estes Valley Recreation and Park District | After-school provider | Kindergarten and first-grade students | School-year: 12 | School-year: 12 |
| Total capacity for school-age children during the <u>school year</u> | | | 52** | |
| Total capacity for school-age children during the <u>summer</u> | | | 163 | |

*Some family childcare homes may also serve a small number of school-age children. Because few school-age children in the Estes Valley are served in this setting and because slots in family childcare homes are not specifically designated for school-age children, they are not included in the capacity data in the above table.

** Although the Boys & Girls Club has capacity to serve 54 children, current staffing levels limit them to serving 40 children.

*** The YMCA of the Rockies school-age summer childcare program is licensed to serve up to 300 children. However, some of these slots are filled by tourists. The daily average number of children from Estes Park is 93.

Children on Waitlists for Care

In total, providers serving children under 6 reported 38 children on waitlists. Those serving school-age children reported 35 children on waitlists for care during the school year and 12 children on waitlists for care during the summer. It is important to note the likelihood that waitlist numbers reflect a duplicated number of children seeking care, since families may put themselves on the waitlist for more than one provider. Additionally, some children on waitlists may be currently enrolled at another provider but are seeking care that is more aligned with their preferences or needs, meaning some children on waitlists are not without care entirely.

The number of children on waitlists should not be interpreted as estimates for unmet need for childcare. In addition to the possibility that they reflect a duplicated number of children seeking care, many families of infants and toddlers shared throughout the needs assessment process that they do not put themselves on waitlists for care because there are so few options that waitlists can be years long.

TABLE: CHILDREN ON WAITLISTS FOR CARE BY AGE GROUP

| Age group | Total number of children on waitlists |
|----------------------|---------------------------------------|
| Infants and toddlers | 6 |
| Preschoolers | 32 |
| School-age children | School year: 35 Summer: 12 |

Childcare Needs Assessment

Although some providers have waitlists, others report a handful of open slots for certain age groups. The availability of open slots should not be interpreted as a sign that existing childcare capacity is sufficient to meet families' needs. Rather, the availability of slots for certain age groups at some providers likely indicates a mismatch between families' individual needs and preferences and the options available to them in the community.

Operating Hours

Care provided outside of traditional working hours is extremely limited at existing licensed childcare providers. There is no care available before 7:30 a.m. or after 5:30 p.m., and weekend care is nearly nonexistent, with only one family childcare home provider offering care on Saturdays and no care available on Sundays. Two providers reported offering drop-in care, with limitations. Bennett Preschool at YMCA of the Rockies reported offering drop-in care in the summer for preschool-age children only, and one family childcare provider reported occasionally offering drop-in care.

Rates and Funding Sources

The average rate charged for care for infants and toddlers (children under age 2.5) in the Estes Valley is \$44 per day, with a range from \$36 per day to \$55 per day. Published tuition rates for preschoolers also average out to be approximately \$44/day^b, but some families with preschool-age children will pay less than this amount if their child qualifies for Universal Preschool Colorado (UPK). UPK provides state funding for 15 hours per week of free preschool to all Colorado kids in the year before kindergarten. Four-year-olds with certain risk factors qualify for 30 hours per week of free preschool, and 3-year-olds with risk factors qualify for 10 hours per week of free preschool.

Published tuition rates for school-age children attending the Boys & Girls Club are \$15 per day for the school year and \$25 per day for the summer. However, the Boys & Girls Club has provided scholarships for Estes families in the 2023-24 school year and is not currently charging tuition for after-school care. Tuition for the YMCA of the Rockies' summer program for school-age children is \$50 per day, with options for early drop-off (\$5) and late pickup (\$10).

Childcare costs in the Estes Valley are significantly below statewide averages. According to the 2022 *Colorado Child Care Market Rate Study*, the average daily rate for full-time center-based care in Colorado was \$75 for infants, \$63 for toddlers, \$53 for preschoolers, and \$40 for school-age children.⁵⁸ Average daily rates for family childcare home providers were \$49 for children under 2, \$46 for children between ages 2 and 6, and \$39 for school-age children.

Although the cost Estes Valley families pay for childcare is lower than the statewide average, many families in the community reported that they struggle to afford care, and the cost of care was a commonly cited barrier for those whose children were not currently in any form of non-parental care. This topic is discussed in more detail using data from the family survey in a subsequent section of this report.

^b Tuition for the school district-operated preschool was excluded from this calculation, because their rate includes the discount families receive from participation in Universal Preschool Colorado. Four-year-olds attending preschool at the district's Park Place Preschool pay \$275 per month, unless they have risk factors that qualify them for additional hours of free preschool. Three-year-olds who have certain risk factors attend Park Place Preschool at no cost through Universal Preschool Colorado.

Childcare Needs Assessment

Most licensed providers in the Estes Valley rely on a combination of public and private funding sources, including:

- **Private-pay tuition:** All providers reported private-pay tuition from parents as a funding source, although the Boys & Girls Club reported waiving parent tuition for after-school care for the 2023-24 school year.
- **Universal Preschool Colorado:** Mountaintop Childcare, Park Place Preschool, and Bennett Preschool at YMCA of the Rockies report receiving Universal Preschool Colorado funds.
- **Colorado Child Care Assistance Program (CCCAP):** Mountaintop and Bennett Preschool report receiving Colorado Child Care Assistance Program (CCCAP) funds.
- **EVICS tuition assistance:** Mountaintop and Bennett Preschool report receiving EVICS tuition assistance.
- **Grants:** Boys & Girls Club, Mountaintop Childcare, and Bennett Preschool reported grants or donations as a funding source.
- **State and federal special education funds:** Park Place Preschool, operated by the Estes Park School District, receives state and federal special education funds.

Colorado Shines Quality Ratings

Colorado Shines is Colorado's Quality Rating and Improvement System for childcare centers, family childcare homes and preschool programs. It rates the quality of licensed childcare and early learning programs on a scale from 1 to 5, as detailed below:

- **Level 1:** All licensed programs automatically receive a Level 1 rating. Level 1 ratings indicate that a program is licensed and in good standing with the State of Colorado and that the provider meets basic health and safety requirements.
- **Level 2:** Programs that complete certain activities, such as a quality improvement plan, registering staff in the state's Professional Development Information System, and completed e-learning courses, can advance to Level 2.
- **Levels 3-5:** Programs rated 3 through 5 have completed Level 2 requirements and have also been assessed and rated by a Colorado Shines Quality Rating Assessor on five categories: workforce qualifications, family partnerships, administrative practices, learning environment, and child health.

Childcare centers, family childcare homes and preschools are rated on the same scale, and reimbursement rates for the Colorado Child Care Assistance Program (CCCAP) vary based on quality rating.

Ratings for center- or school-based childcare and preschool providers in the Estes Valley range from Level 2 (two providers) to Level 4 (one provider). Both licensed home-based providers are rated at Level 1. As a neighborhood youth organization, the Boys and Girls Club is not part of the Colorado Shines rating system. The Recreation District program for school-age children is also not part of the Colorado Shines rating system.

Childcare Needs Assessment

Staff Qualifications and Compensation

Among the three licensed childcare and preschool programs with staff, two reported that they align their requirements for staff qualifications with state licensing rules. Park Place Preschool, operated by the Estes Park School District, requires that teachers have a teacher's license in Early Childhood Education through the Colorado Department of Education. The Boys and Girls Club is not subject to the same licensing requirements as childcare providers serving young children and sets its own requirements for program staff. They must be 18 years or older, and they must be able to pass a background check.

Wages for staff vary based on their role within their programs, but wages for most positions generally fall below the threshold of \$24.52 identified in 2024 as the living hourly wage for a single adult in Larimer County.⁵⁹ Wages for lead teachers in Estes Valley childcare facilities range from \$19 to \$23 per hour, and wages for assistant teachers range from \$16 to \$20 per hour. Wages for Boys & Girls Club program staff start at \$18 per hour. The starting salary for early childhood teachers in the school district-run preschool program is \$44,000 based on the district's pay scale.⁶⁰ Assistant teachers are placed on the district's Classified salary schedule based on experience and role.

Programming Models and Bilingual Instruction

Programming models in the Estes Valley for children under age 6 include in-home childcare, center-based childcare, preschool offered in a school-based setting, and outdoor-focused preschool. After-school care provided by the Boys & Girls Club and Recreation District is available for school-age children during the school year. Boys & Girls Club and YMCA of the Rockies also offer summer programming for school-age children.

Two providers reported offering bilingual instruction (in Spanish and English). One reported they could offer bilingual instruction depending on staffing at the time and noted that finding bilingual staff was very difficult. The school district-run preschool does not offer bilingual instruction but does have a bilingual paraprofessional in each classroom.

Informal Care

Data on informal care (care provided by family members, friends, or neighbors and often referred to as FFN care) are scarce, but quantitative and qualitative data gathered through the family survey and conversations with community partners suggest it is a widely used form of care among families in the Estes Valley. Some families use this form of care out of necessity due to a shortage of licensed options, while others prefer it for its cultural or linguistic relevance, flexibility, or affordability. Families' use of and preferences for informal care are discussed further in the next section summarizing the family survey findings.

Childcare Needs Assessment

TABLE: DETAILED LICENSED PROVIDER CHARACTERISTICS

| Provider | Provider Type | Age Groups Served | Operating Days | Operating Hours | Rates | Colorado Shines Rating |
|---|---------------------------------|--|----------------|---|---|------------------------|
| Boys & Girls Club | Neighborhood youth organization | School-age children (ages 6 to 18) | Mon-Fri | School year: 3 to 5:30 p.m. Summer: 8:30 a.m. to 5:30 p.m. | School year: \$15/day Summer: \$25/day | N/A |
| Country Kids Daycare | Family childcare home | Infants, toddlers, preschoolers | Mon-Fri | 7:30 a.m. to 5:30 p.m. | \$36/day | 1 |
| Mountaintop Childcare | Childcare center | Preschoolers, school-age children | Mon-Fri | 7 a.m. to 5:30 p.m. | \$244/week, equating to \$48.80/day | 2 |
| Park Place Preschool | Preschool program | Preschoolers | Mon-Fri | 8 a.m. to 3 p.m. | 3-year-olds: Free through Universal Preschool Colorado 4-year-olds: \$275/month* | 4 |
| Rainbow Kids | Family childcare home | Infants, toddlers, preschoolers, school-age children | Tues-Sat | 8 a.m. to 5 p.m. | Infants: \$40/day Children ages 2 and up: \$45/day | 1 |
| YMCA of the Rockies (Bennett Preschool and school-age summer program) | Childcare center | Toddlers, preschoolers | Mon-Fri | 8 a.m. to 4:30 p.m. | Toddlers: \$55/day** Preschoolers: \$50/day School-age care during summer: \$50/day | 2 |

* Park Place Preschool's monthly tuition rate for 4-year-olds reflects 15 hours per week of free preschool through Universal Preschool Colorado. Children who have certain risk factors qualify for additional hours of free preschool.

** Beginning in the Fall of 2024, tuition for toddlers at Bennett Preschool at the YMCA will increase to \$65 per day.

Childcare Needs Assessment

Family Needs and Preferences

This section of the needs assessment summarizes findings from quantitative and qualitative methods for gathering data and feedback about childcare needs and preferences from Estes Valley families with children. As detailed in the methodology section, these methods included an online survey assessing childcare experiences, needs, and preferences and three in-person focus groups held in the Estes Valley. Each of these methods yielded valuable information about families' experiences searching for or finding childcare for their children, common barriers to finding or affording childcare, and their needs and preferences related to childcare options. The family survey informed the calculation of estimates of additional childcare capacity required to meet current and future needs in the community, and these are included in a subsequent section.

Family Survey

Background and Methodology

The Estes Valley Childcare Family Survey collected data from Estes Valley parents and families with children under the age of 13 on topics including:

- current childcare arrangements;
- experiences securing childcare;
- barriers to securing childcare;
- satisfaction with current childcare arrangements;
- preferences for childcare, including the desire to use non-parental childcare, preferred settings, and hours and days of care needed.

The survey was conducted via SurveyMonkey and was available in both English and Spanish. It was open for responses from December 2023 until February 2024 and received 204 valid responses, including 26 responses in Spanish. Responses were collected via convenience sampling and snowball sampling methods, which are non-probability sampling methods. The link to the survey was shared via the Town of Estes Park and numerous community partners, including EVICS Family Resource Center, childcare providers, the school district, the Estes Valley Library, and the Estes Chamber of Commerce, among others. Some responses were collected in person at community events. Focus group participants were also invited to complete the survey. The consulting team monitored the demographic makeup of respondents to ensure a sample that closely reflects the population of children and families in the Estes Valley on key characteristics such as race/ethnicity, household income, and language spoken at home.

Respondent Characteristics

Below is a summary of the characteristics of survey respondents:

Age of children:

- 118 respondents (58%) had at least one child under age 6.
- 128 respondents (63%) had at least one school-age child between the ages of 6 and 12.
- 51 respondents (25%) had children in both age groups.

Childcare Needs Assessment

Place of residence:

- The majority of respondents (96%) lived in the Estes Valley. Among those who did not live in the Estes Valley, the most commonly cited place of residence was Loveland, with a handful of respondents stating they lived elsewhere.

Place of employment:

- Nine out of 10 respondents reported that at least one person in their household worked for an organization in the Estes Valley, either on-site or remotely. Approximately 17% reported someone in their household worked remotely for an organization located outside the Estes Valley; 8% reported someone in their household commuted to work outside the Estes Valley; and 2% reported that no one in their household was working.

Household income:

- The largest share of respondents (20%) reported an annual household income between \$100,000 and \$149,999, closely followed by those earning between \$35,000 and \$49,999 (19%) and those earning more than \$150,000 per year (19%).
- Families with lower incomes were somewhat overrepresented in the sample compared to the population of Estes Valley families as a whole. This pattern is not unexpected, as Census Bureau data on families include married couples without children at home. Families with young children tend to have lower incomes due to the impact of childcare challenges on labor force participation and the fact that they are more likely to be early in their careers.^{61, 62}

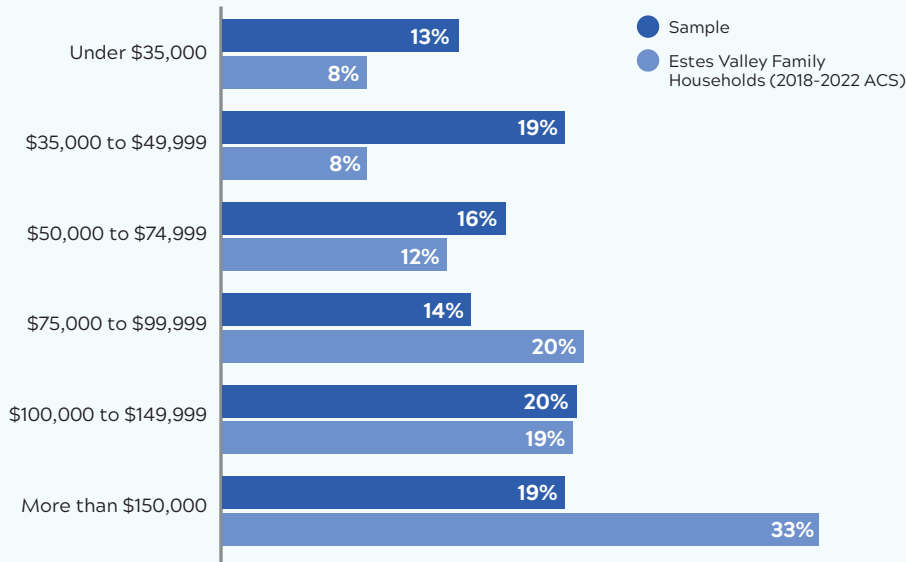
Race/ethnicity:

- Approximately two-thirds of survey respondents identified as White, and nearly a quarter identified as Hispanic or Latino. The racial and ethnic makeup of survey respondents resembles the racial and ethnic makeup of students enrolled in the Estes Park School District.

Childcare Needs Assessment

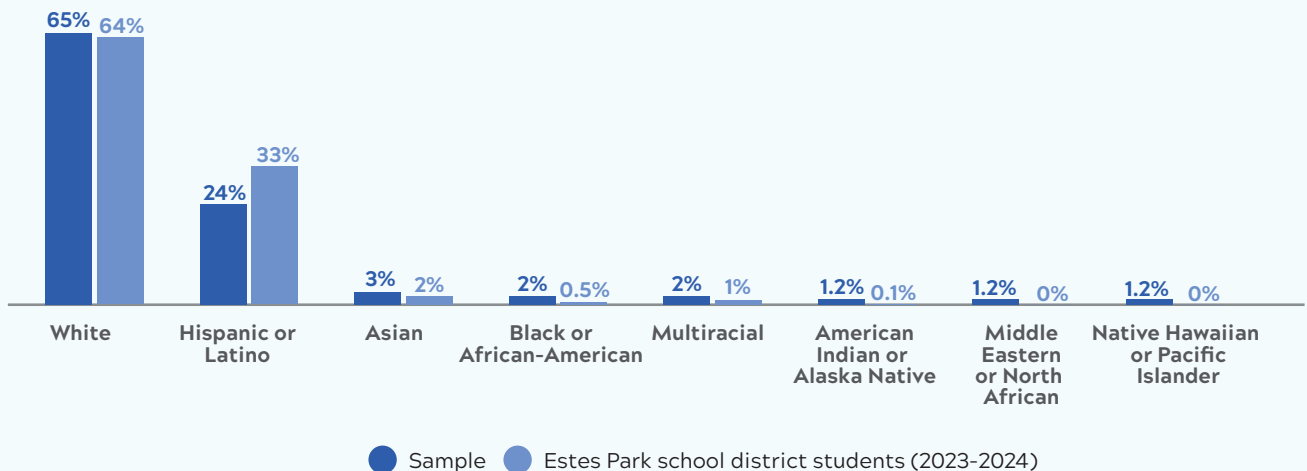
FAMILIES WITH LOWER INCOMES ARE OVERREPRESENTED IN THE SAMPLE WHEN COMPARED TO THE FULL POPULATION OF ESTES VALLEY FAMILIES. THIS IS NOT UNEXPECTED, AS THE ACS DATA ON FAMILIES INCLUDES MARRIED COUPLES WITHOUT CHILDREN AT HOME.

Income distribution among survey respondents as compared to Estes Valley family households in 2018-2022



APPROXIMATELY TWO-THIRDS OF RESPONDENTS IDENTIFIED AS WHITE, AND NEARLY A QUARTER IDENTIFIED AS HISPANIC OR LATINO.

Race/ethnicity of survey respondents as compared to Estes Valley school district students in the 2023-24 school year



Childcare Needs Assessment

Primary language:

- More than eight in 10 respondents (82%) reported the primary language spoken at home was English. Approximately 15% reported their primary language was Spanish, and 3% reported it was some other language, including Mandarin, Chinese, Nepali, Portuguese, and Dutch.

Employment status:

- Nearly six in 10 respondents (59%) were employed full-time and 17% were employed part-time. Approximately 7% were self-employed; 6% were not employed and not currently looking for work; 4% were not employed and were currently looking for work. Small proportions were on unpaid leave from work (2%); retired (1%); full-time students (1%); or in school and working (1%).

Assistance paying for childcare:

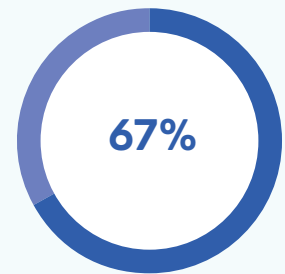
- About one in eight respondents (13%) reported receiving some form of government assistance to pay for childcare in the past 12 months.
- Nearly one in 10 respondents (9%) reported receiving EVICS tuition assistance in the past 12 months.

Childcare Arrangements among Children Under 6

Among survey respondents with at least one child under age 6 who was not yet in kindergarten, 67% reported that their child was in some form of non-parental care during a typical week. Non-parental care includes formal care (e.g., licensed center-based or home-based care) or informal care (care provided by a grandparent, family, friend, or neighbor). This share is very close to the American Community Survey estimate of the percentage of Estes Valley children under 6 with all available parents in the labor force (62%), which is often used as a proxy for the number of young children in need of childcare.

Families with preschool-age children were slightly more likely to report that their child was in some form of non-parental care than families with infants and toddlers (69% of respondents with preschool-age children, compared to 65% of respondents with infants or toddlers).

Children Under 6 in Some Form of Non-Parental Care



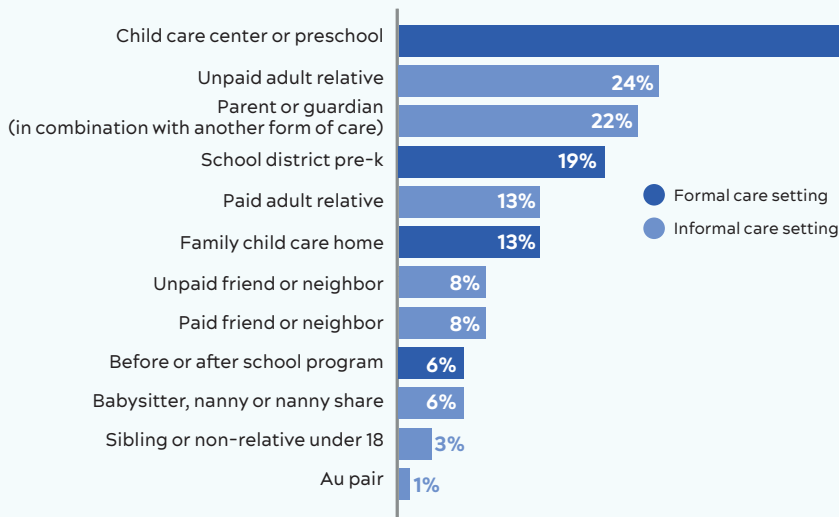
Childcare Settings

Among respondents whose children under 6 were in some form of non-parental care, licensed childcare centers or preschools were the most commonly used form of care, with 46% of families with young children reporting using this type of care during a typical week. Care provided by an adult relative was the second most common form of care, followed by care provided by a parent or guardian in combination with another form of care. Note that the percentages of families using each care type add up to more than 100, indicating that many families are utilizing care from multiple sources.

Childcare Needs Assessment

AMONG YOUNG CHILDREN IN NON-PARENTAL CHILD CARE, LICENSED CHILD CARE CENTERS OR PRESCHOOLS WERE THE MOST COMMONLY USED FORM OF CARE.

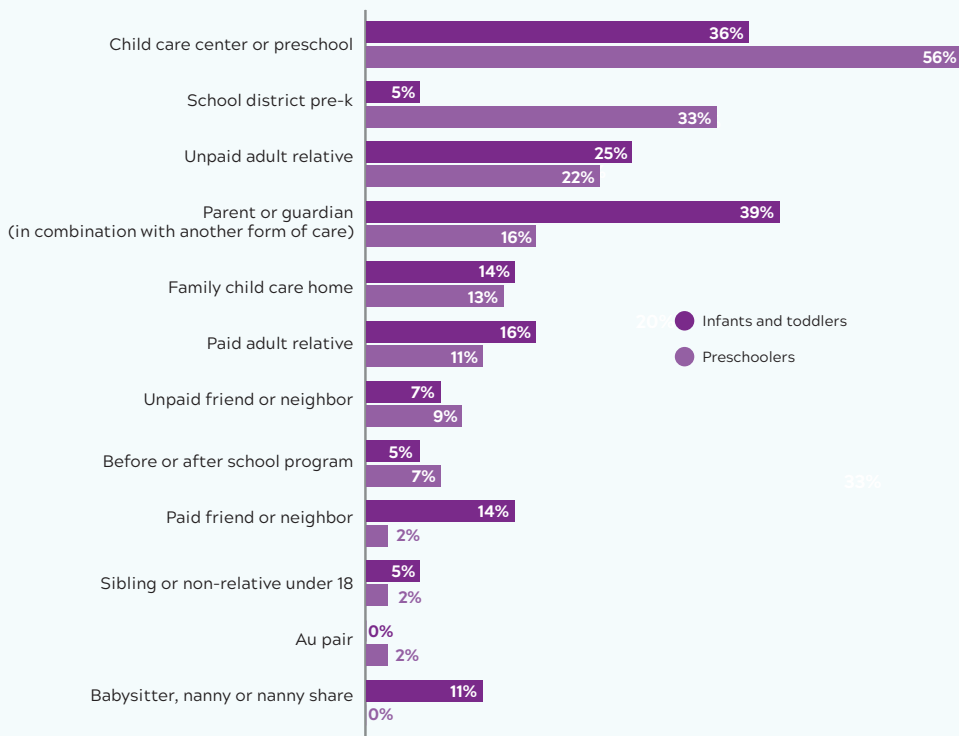
Percent of respondents reporting their child is cared for in each setting during a typical week



The most commonly used forms of childcare vary by age group. Infants and toddlers are most likely to be cared for by a parent or guardian in combination with some other form of care, while preschool-age children are most likely to be in a licensed center- or school-based program.

RESPONDENTS WITH INFANTS AND TODDLERS WERE MORE LIKELY THAN THOSE WITH PRESCHOOL-AGE CHILDREN TO REPORT THEIR CHILD WAS CARE FOR IN AN INFORMAL SETTING OR BY A PARENT OR GUARDIAN IN COMBINATION WITH ANOTHER FORM OF CARE.

Respondents with children under age 6 indicating they use each form of care during a typical week by age group

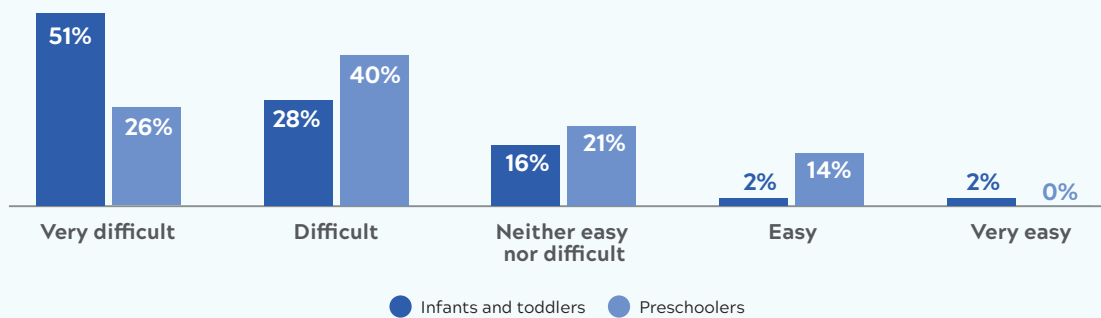


Childcare Needs Assessment

Difficulty Finding Childcare

When asked to rate the difficulty they experienced finding their current childcare arrangements, nearly three-quarters of respondents said finding care was difficult or very difficult. Only 9% said it was easy or very easy. Respondents with infants or toddlers were nearly twice as likely as those with preschoolers to report that finding care was very difficult, a reflection of the acute shortage of formal care options for children under age 2.5 in the Estes Valley.

FAMILIES WITH INFANTS AND TODDLERS REPORTED MORE DIFFICULTY FINDING CHILDCARE THAN THOSE WITH PRESCHOOL-AGE CHILDREN.



Satisfaction with Current Childcare Arrangements

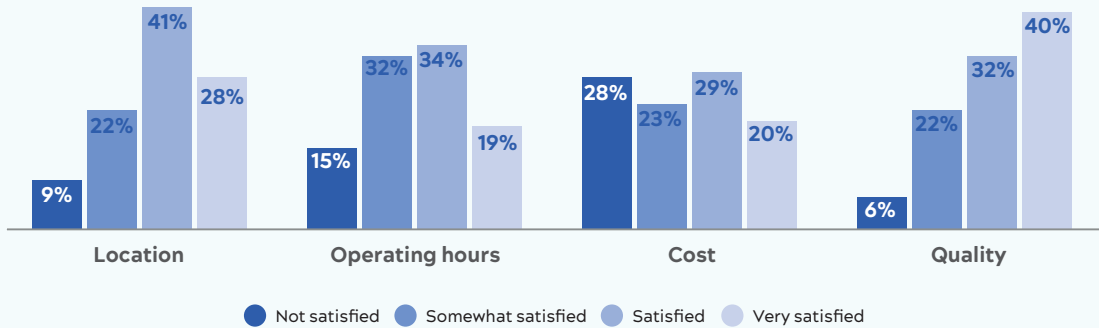
When asked to rate their overall satisfaction with their current childcare arrangements, 58% of respondents with young children in some form of non-parental care said they were satisfied or very satisfied. Approximately 9% reported they were not satisfied. Among those who were not satisfied with their current care arrangements, common sources of dissatisfaction included long commutes for childcare when options were not available or affordable in the Estes Valley, difficulty finding care on days off from school, and concerns with the curriculum or nature of activities at their current provider(s). The share of parents reporting they were not satisfied with their care arrangements was significantly higher among families whose children were in informal care only.

In addition to rating their overall satisfaction with the current childcare arrangement(s), respondents were also asked to rate their satisfaction with four aspects of their childcare circumstances: location, operating hours, cost, and quality. Among these factors, the share of respondents reporting they were dissatisfied was highest for cost, with 28% of respondents saying they were not satisfied with the cost of their care. Respondents had the highest level of satisfaction with the quality of their care, with 40% reporting they were very satisfied.

Childcare Needs Assessment

WHEN RANKING SATISFACTION WITH FOUR COMPONENTS OF THEIR CURRENT CHILDCARE ARRANGEMENTS, FAMILIES REPORTED THE HIGHEST LEVELS OF SATISFACTION WITH QUALITY AND THE LOWEST LEVELS OF SATISFACTION WITH COST.

Satisfaction with four aspects of care among families among families with children under 6



Desire to Make Changes to Current Childcare Arrangement(s)

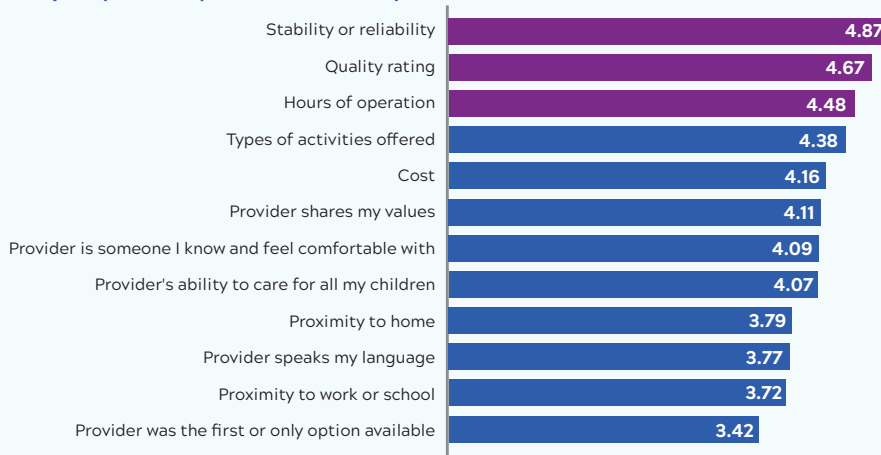
The survey asked respondents with young children currently cared for in some type of non-parental care whether they would like to make any changes to their current childcare arrangement(s). Only 17% said they would not make any changes to their care arrangement(s). Approximately 43% said they would increase their current number of hours or days of care. About 23% said they would change to a different type of provider, and 17% reported they would change to a different provider of the same type. Approximately 10% said they would make some other change, such as finding care closer to home, decreasing the cost of their current form of childcare, or finding care of a higher quality.

Factors Considered when Choosing Their Care Arrangement(s)

Respondents were asked to rate the importance of several factors families often consider when making decisions about their childcare arrangements. The three factors with the highest average importance ratings were stability or reliability, quality rating, and hours of operation. The top three factors were consistent for respondents with infants/toddlers and preschool-age children.

STABILITY OR RELIABILITY, QUALITY RATING, AND HOURS OF OPERATION WERE THE TOP THREE FACTORS PARENTS CONSIDERED WHEN CHOOSING THEIR CARE ARRANGEMENTS.

Average importance rating for select childcare characteristics: Children under 6 in non-parental care (5 = extremely important, 1 = not at all important)



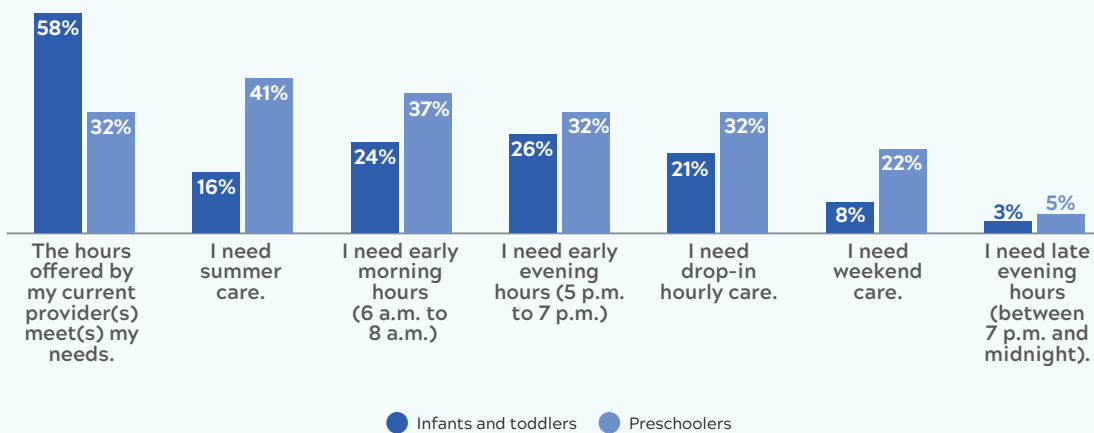
Childcare Needs Assessment

Sufficiency of Current Hours and Days of Care Offered by Provider

Most respondents with young children in some form of non-parental care need care beyond the hours offered by their current provider(s). Only 38% reported that their provider's current operating hours and days met their needs. The most commonly reported times when respondents needed care but did not have it at their current provider(s) were summer (34%), early morning hours between 6 a.m. and 8 a.m. (29%), and early evening hours between 5 p.m. and 7 p.m. (29%). More than one in six respondents (17%) reported that they needed care on weekends but did not currently have access to it at their current provider(s).

Respondents with infants and toddlers were more likely than those with preschool-age children to report that the hours and days offered by their current provider(s) met their needs (58% of those with infants and toddlers, compared to 32% of those with preschoolers). This difference likely reflects the fact that preschool-age children were more likely to be in formal care settings with set operating hours, while infants and toddlers were more likely to be cared for in informal settings that may offer families more flexibility. The largest unmet need for respondents with preschoolers in childcare was summer care: 41% of respondents with preschoolers reported that they needed care during the summer but did not have it at their current provider(s). Respondents with preschoolers were also nearly three times as likely to report needing care on weekends but not having it at their current provider(s). Approximately 22% of respondents with preschool-age children reported needing care on weekends, compared to 8% of those with infants or toddlers.

RESPONDENTS WITH INFANTS AND TODDLERS WERE MORE LIKELY THAN THOSE WITH PRESCHOOL-AGE CHILDREN TO REPORT THAT THEIR CURRENT PROVIDER'S HOURS MET THEIR NEEDS. THIS PATTERN LIKELY REFLECTS THEIR GREATER RELIANCE ON INFORMAL CARE.



Ability to Afford Childcare Costs

Approximately two in five respondents (39%) described their ability to afford childcare as very challenging or extremely challenging. Respondents with preschoolers were more likely to report difficulty affording their current childcare costs, again likely a reflection of preschoolers' higher likelihood of being cared for in formal care settings that often cost more than care in informal settings.

When asked how much they could or would pay for childcare for one child on a monthly basis, the range of amounts respondents provided was very wide. Some families reported they could not pay anything for care, while others said they could pay up to \$2,500 per child, per month. The average amount a family reported they could afford was \$735 per child, per month – equating to about \$37 per day. This amount is below the daily rates charged by most licensed providers in the Estes Valley.

Childcare Needs Assessment

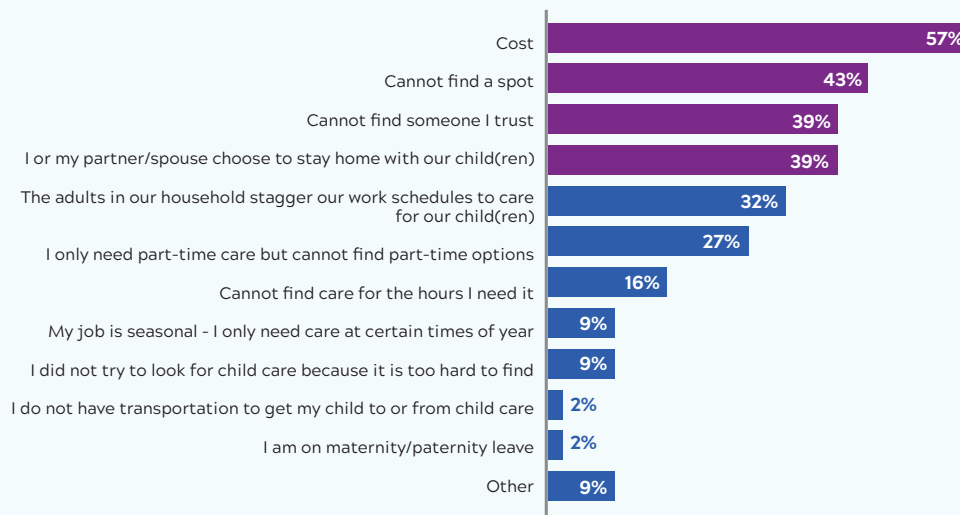
Childcare Needs and Preferences among Children Under 6 NOT in any Form of Non-Parental Childcare

Approximately one-third of respondents with children under 6 reported that their child was not cared for by anyone other than their parents during a typical week. These respondents were asked a set of questions to understand any barriers they face to accessing childcare, as well as their needs and preferences related to childcare options for their children.

Reasons Children are Not in Non-Parental Childcare

Those with young children who were not cared for by anyone besides their parents were asked to report the reasons why their children were not in any form of care. The most commonly cited reason was cost, with 57% reporting it as a barrier to care. The inability to find a spot, difficulty finding someone they trust, and choosing to stay home with their children were also common reasons reported by families.

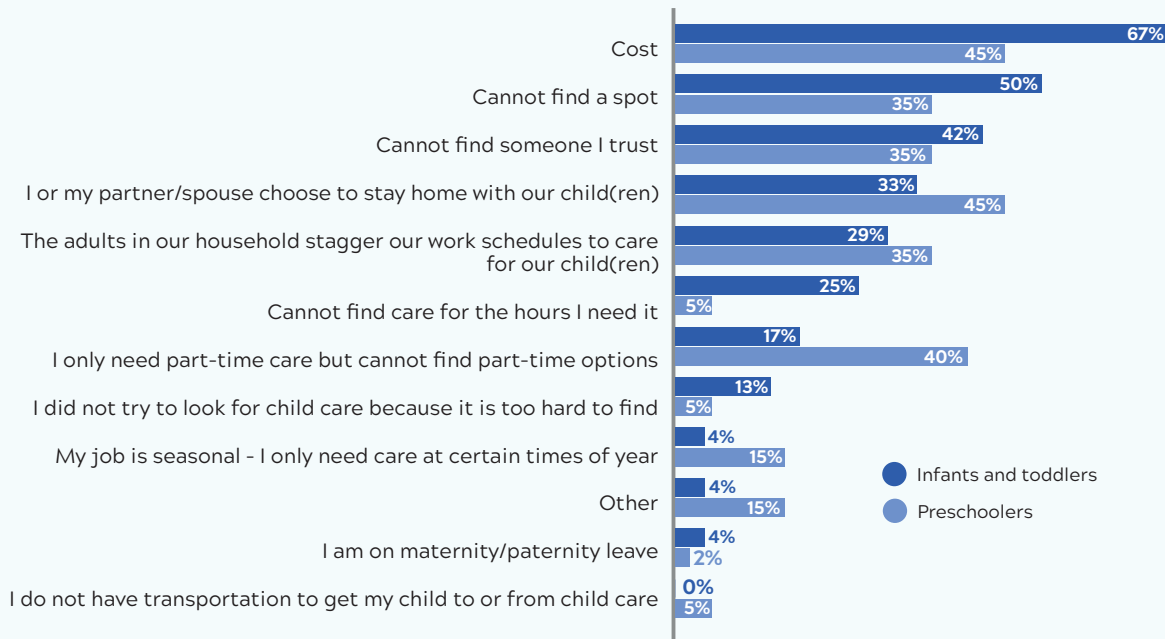
COST WAS THE MOST COMMONLY CITED BARRIER REPORTED BY FAMILIES WHOSE CHILDREN WERE NOT CARED FOR IN ANY FORM OF NON-PARENTAL CHILDCARE.



Reasons children were not cared for by anyone besides their parents varied by age group. Respondents with infants and toddlers were significantly more likely to report cost and inability to find a spot as barriers to childcare. Cost was still a commonly reported barrier for those with preschool-age children, but respondents with preschool-age children were more likely to report choosing to stay home with their children or wanting but not finding part-time options for their children.

Childcare Needs Assessment

FAMILIES WITH INFANTS AND TODDLERS REPORTED COST AND INABILITY TO FIND A SPOT AS BARRIERS TO CHILDCARE AT HIGHER RATES THAN FAMILIES WITH PRESCHOOLERS.

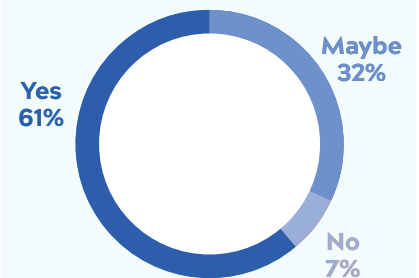


Potential Use of Childcare and Preferred Settings

When asked if they would use childcare for their child if it were available to them at a cost they could afford, 61% of those whose child was not in any form of care said yes. An additional 32% said maybe, and 7% said no. These answers were similar across age groups, with respondents with infants or toddlers being only slightly more likely to answer “no” than those with preschool-age children.

Respondents who answered “yes” or “maybe” were asked to rank their preferred childcare settings from one to six, with one being most preferred and six being least preferred. Responses indicated a preference for formal care options. Licensed childcare centers or preschools emerged as the top choice, followed by licensed home-based providers. These two settings emerged as the top choices for parents of infants and toddlers and for those with preschool-age children.

Nine out of 10 respondents whose children were not in any form of non-parental childcare answered “yes” or “maybe” when asked if they would use care if it were available and affordable.

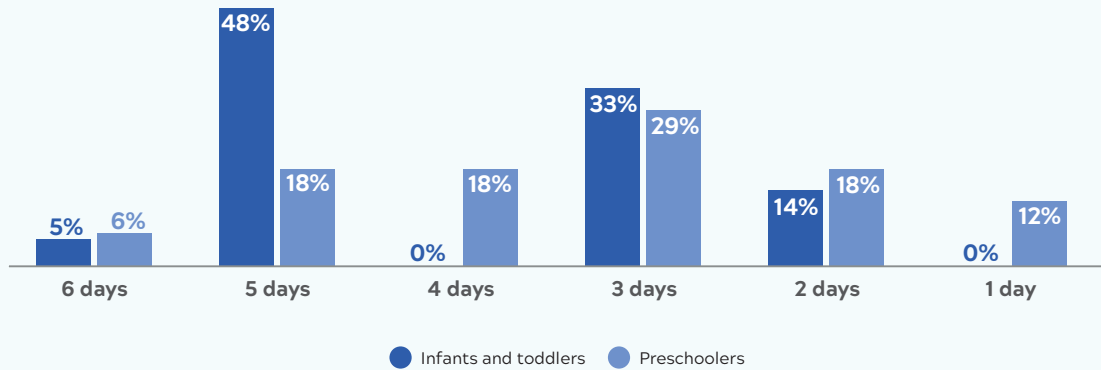


Amount of Care Families Want or Need

Those who indicated they would use childcare if it were available and affordable were also asked to report how many days per week they would want or need care. The average number of days per week care was needed was 3.7, with clusters of responses from those who preferred five days and three days per week of care. Approximately one-third of respondents (34%) reported wanting or needing care five days per week, and another third (32%) reported wanting or needing care three days per week. Respondents with infants and toddlers were much more likely than those with preschool-age children to report wanting or needing care five days per week, indicating a desire for part-time care among families with preschoolers who are not currently cared for by anyone besides their parents.

Childcare Needs Assessment

MORE THAN HALF OF RESPONDENTS WITH INFANTS AND TODDLERS WHO ARE NOT IN ANY FORM OF NON-PARENTAL CHILDCARE REPORT NEEDING AT LEAST FIVE DAYS PER WEEK OF CARE, WHILE RESPONDENTS WITH PRESCHOOLERS LARGELY PREFERRED PART-TIME CARE.

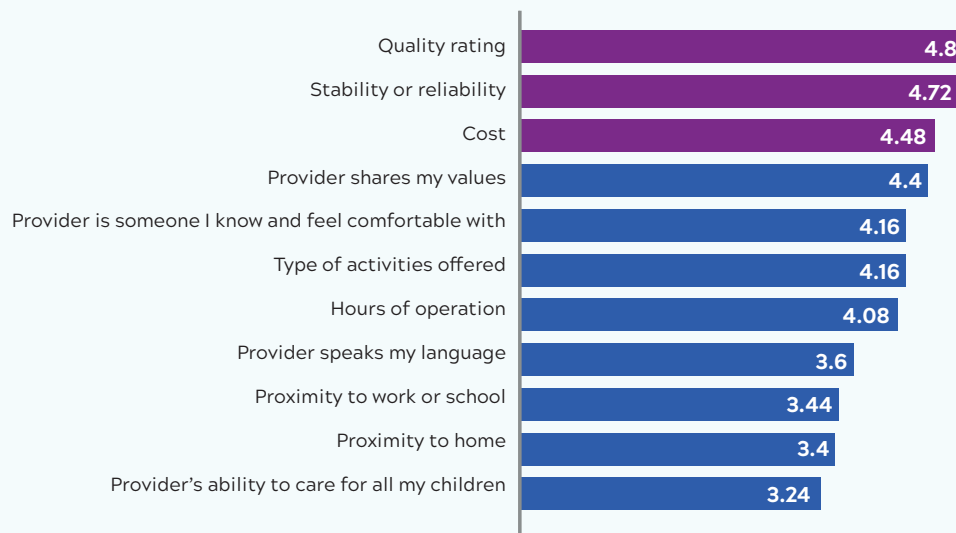


Factors Families Consider When Choosing Childcare Arrangements

Families who indicated they would use care for their child if it were available were asked to rate the importance of several factors they would consider in making decisions about their childcare arrangements. Quality rating emerged as the most important factor, followed by stability or reliability, and cost. These factors were consistent across age groups.

QUALITY RATING, STABILITY OR RELIABILITY, AND COST WERE THE MOST IMPORTANT FACTORS AMONG PARENTS WHOSE CHILDREN WERE NOT IN CHILDCARE.

Average importance rating for childcare characteristics: Respondents with children under 6 who are not in care but would use it if available
(5 = extremely important, 1 = not at all important)



Childcare Needs Assessment

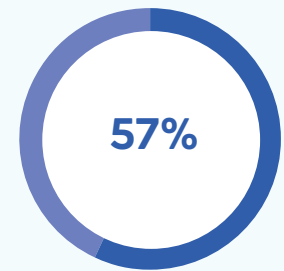
What Families Could Pay for Care

Respondents who said they would use childcare if it were available and affordable to them were asked to report how much they would or could pay for childcare for one child on a monthly basis. The responses ranged from not being able to pay anything for care to being able to pay \$1,600 per month, per child. The average amount was \$398 per month, equating to about \$20 per day. Notably, the average amount families whose children are not in any form of non-parental care said they could pay is significantly lower than the average reported among families whose child was currently in some form of childcare. Finding ways to make care affordable for families will be key to ensuring Estes Valley families with young children are able to access the care they want or need in order to work.

Childcare Arrangements among School-age Children

Families with children from kindergarten through age 12 were also asked about their use of non-parental childcare during a typical week. Approximately 57% of those with a school-age child reported that their child was in some form of non-parental care (excluding school) during the week. Families with school-age children were less likely to report using non-parental care than those with younger children.

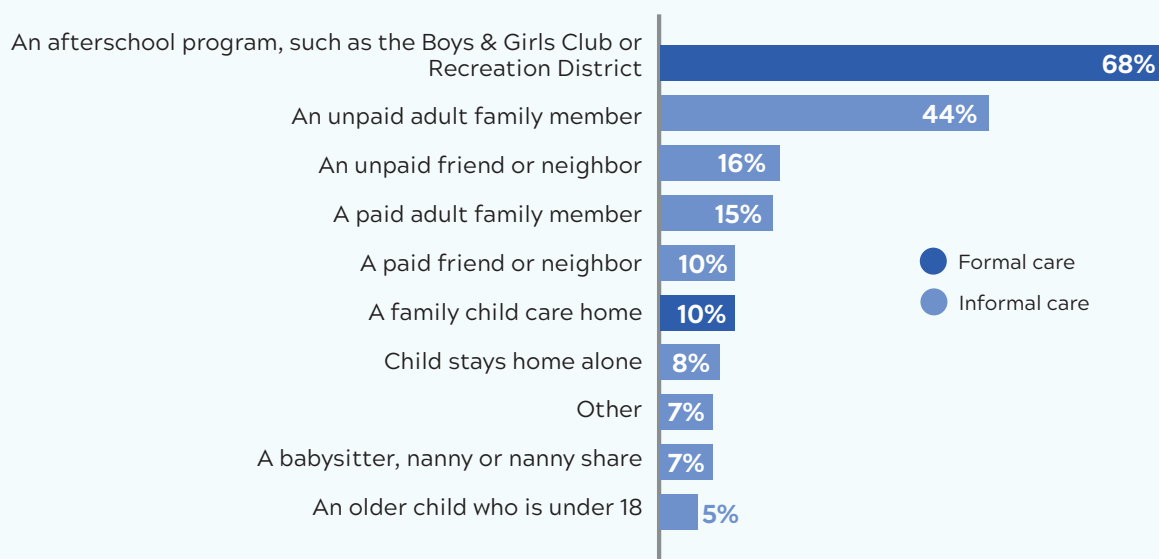
School-age Children in Some Form of Non-Parental Care



Childcare Settings

Among those whose school-age children were in some form of non-parental care, an after-school program was the most commonly used form of care, followed by an adult family member who is not the child's parent, and a friend or neighbor.

AFTER-SCHOOL PROGRAMS WERE THE MOST COMMONLY REPORTED FORM OF CARE AMONG RESPONDENTS WITH SCHOOL-AGE CHILDREN IN SOME FORM OF NON-PARENTAL CARE.



Childcare Needs Assessment

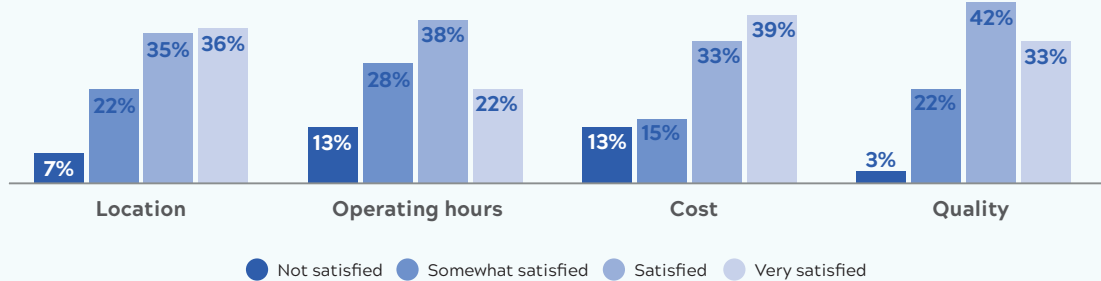
Satisfaction with Current Childcare Arrangement(s)

When asked to rate their overall satisfaction with their current childcare arrangement(s), 60% of respondents with school-age children were satisfied or very satisfied – on par with satisfaction reported among parents with younger children. Approximately 8% of respondents reported they were not satisfied with their care. Among those who were not satisfied, commonly reported reasons included difficulty finding a spot in an after-school program, long periods spent on waitlists for care, cost, and a desire for more options, including programming options and options for different times of day (e.g., weekends or evenings).

Families with school-age children were also asked to rate four specific aspects of their childcare settings: location, operating hours, cost, and quality. The highest levels of satisfaction were reported for quality (75% of respondents satisfied or very satisfied) and for cost (72% of respondents satisfied or very satisfied). Although most respondents were satisfied with the cost of their care, cost, along with operating hours, also had the highest rates of respondents reporting they were dissatisfied (13%).

WHEN RANKING SATISFACTION WITH FOUR COMPONENTS OF THEIR CURRENT CHILDCARE ARRANGEMENTS, FAMILIES REPORTED THE HIGHEST LEVELS OF SATISFACTION WITH QUALITY AND COST.

Satisfaction with four aspects of care among families among families with school-age children

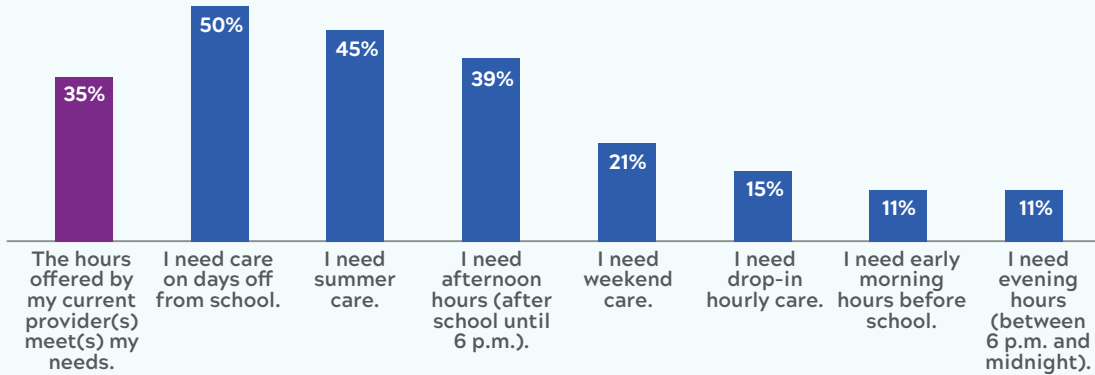


Sufficiency of Current Hours and Days of Care

Most respondents with school-age children reported that they need care beyond the hours or days offered by their current provider(s), with only one in three saying their current provider's hours met their needs. The most commonly reported unmet needs for care were care on days off from school (50%) and summer care (45%). Nearly 40% reported that they needed but did not have care during afternoon hours, and 21% reported they needed but did not have weekend care.

Childcare Needs Assessment

ONLY ONE THIRD OF RESPONDENTS WITH SCHOOL-AGE CHILDREN IN NON-PARENTAL CARE SAID THEIR CURRENT PROVIDER'S HOURS MET THEIR NEEDS.



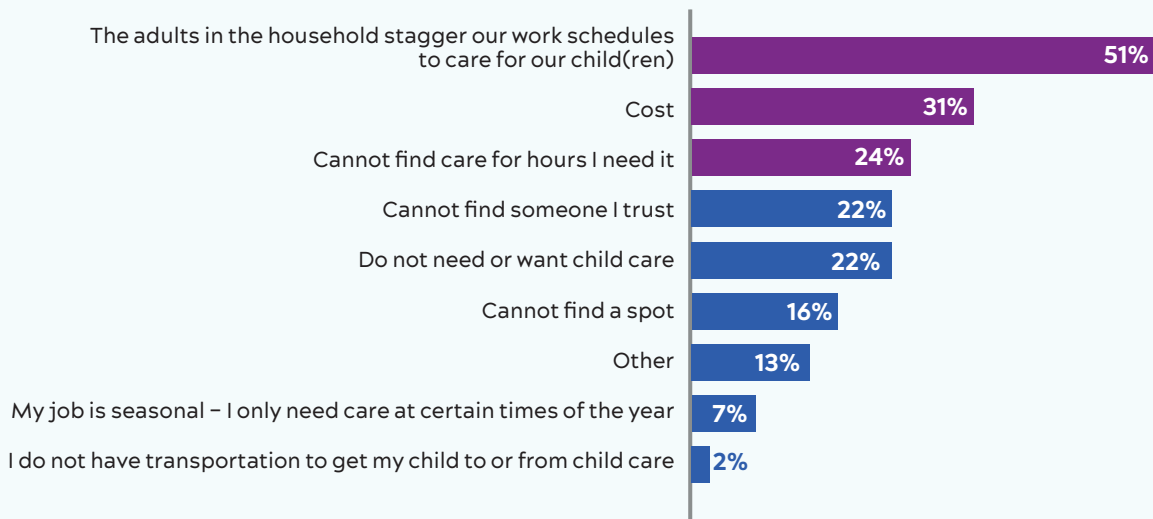
Childcare Needs and Preferences among School-Age Children NOT in any Form of Non-Parental Childcare

Approximately 43% of respondents with school-age children indicated their children were not cared for by anyone other than their parents or their school during a typical week. These respondents were asked a set of questions to understand any barriers they face to accessing childcare, as well as their needs and preferences related to childcare options for their children.

Reasons School-Age Children are Not in Non-Parental Childcare

When asked why they did not have someone else regularly care for their school-age child(ren), the most common reason reported by those whose child was not in any form of non-parental care was that the adults in the household adjusted their work schedules to care for their children. Cost and the inability to find care for the hours they needed it were also commonly reported barriers among this group of respondents.

RESPONDENTS WITH SCHOOL-AGE CHILDREN REPORTED ADJUSTING PARENTS' WORK SCHEDULES, COST, AND INABILITY TO FIND CARE AS REASONS WHY THEIR CHILD WAS NOT IN ANY FORM OF NON-PARENTAL CHILDCARE.



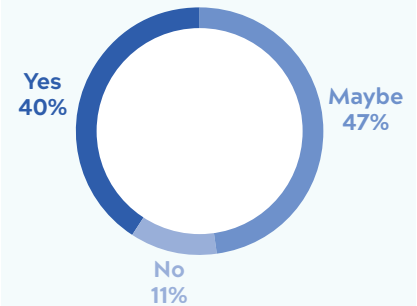
Childcare Needs Assessment

Potential Use of Childcare and Preferred Settings

When asked whether they would use non-parental childcare if it were available to them at a cost they could afford, 40% of respondents not currently using care for their school-age child said yes, and 47% said maybe. Approximately 11% said no. The share of respondents with school-age children answering “yes” to this question was significantly lower than among those with children under 6.

Those who answered “yes” or “maybe” to the question about potential use of childcare were asked to rank their preferred childcare settings from 1 to 6, where 1 is their most preferred option and 6 is their least preferred option. The most preferred option among this group was an after-school program, followed by care provided by a family member who is not the child’s parent and a drop-in option that could be used occasionally.

If quality child care were available to you at a cost you could afford, would you use it for your child(ren)?



Days and Hours Care is Needed

Respondents who indicated they would potentially use childcare if it were available and affordable to them were asked how many days they would want or need care during the school year. The average number of days respondents said they would need or want childcare for their school-age child during a typical week **during the school year** was 2.8. Nearly 40% of respondents said they would need or want care three days per week. More than 20% said they would need or want care two days per week, and only 15% said they would want or need care five days per week.

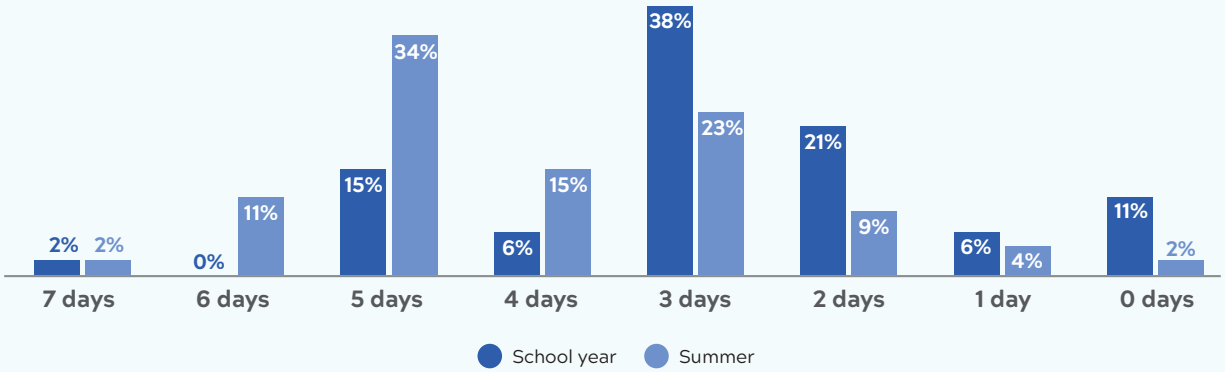
When asked about hours of care needed in a typical week during the school year, the after-school hours had the highest demand, with 62% of respondents indicating they would want or need care between the end of the school day and 6 p.m. Drop-in care options that could be used flexibly were also a popular option, with 45% of respondents indicating they needed or wanted this type of care. Nearly one-third of respondents indicated they wanted or needed care on the weekends during the school year.

Respondents reported needing or wanting more days of care during the summer. The average number of days care was needed or wanted during a typical week **during the summer** was four. In contrast to the school year, the highest share of respondents reported needing or wanting care five days per week (34%). The second-most popular option was three days per week (23%).

The timeframe with the largest demand for care during the summer was the morning and early afternoon, with 77% of respondents indicating they would want or need care from 8 a.m. to 3 p.m. More than half reported wanting or needing care during the afternoon hours from 3 p.m. to 6 p.m. More than one in three indicated wanting or needing a drop-in option that could be used flexibly during the summer, and 30% reported needing weekend care.

Childcare Needs Assessment

RESPONDENTS WITH SCHOOL-AGE CHILDREN REPORT NEEDING MORE DAYS OF CARE DURING THE SUMMER THAN IN THE SCHOOL YEAR.



Childcare Needs Assessment

Estimated Unmet Need for Childcare: Now and Moving Forward

Background

Demand for childcare is notoriously complex to measure. It requires consideration of data on a number of variables, some of which—such as population counts and licensed capacity in existing childcare settings—are readily available, collected regularly and straightforward to analyze. Other key variables, such as parent decision-making processes about whether to use childcare, how many days to use childcare, and which childcare settings to choose, are more complicated. Each family makes its own calculations and decisions based on parents' employment status, income, hours of care needed, preferred settings, their family values, and ability to pay, among other factors. Accurately predicting the outcomes of this complex decision-making process is difficult.

Some common methods for measuring unmet need for childcare, such as using the number of children on waitlists for care at existing providers, do not fully capture the demand for childcare among families in the community. Many families shared during the needs assessment process that they did not put themselves on a waitlist for care because they knew they may not get off the waitlist for years. Additionally, it is likely that some children are on waitlists at multiple providers, resulting in a duplicated number of children seeking care. Other methods of estimating demand, such as using the number of children living in families where all parents are in the workforce as a proxy for the number of children who need childcare, are helpful but still do not capture the extent of the need for care. Many parents who are not currently in the workforce would use childcare if it were available, and this proxy measure fails to capture the childcare needs of those families.

The estimates that follow combine insights on potential use of childcare gleaned from the family survey with secondary population data and licensed childcare capacity data to estimate the current and future need for childcare in the Estes Valley. These estimates are the best available based on existing data, but it is important to note that broader economic and demographic trends, as well as state- and federal-level policy changes, will influence the level of demand for childcare in future years. The consulting team recommends that the Town of Estes Park periodically reassess whether families' needs for childcare are being met to understand how demand is changing over time. This assessment could be accomplished through occasional surveys focused specifically on childcare or by adding questions related to childcare to existing community surveys.

Methodology for Children Under 6

To estimate the demand for childcare for children under 6 in the Estes Valley, the consultants used data from the family survey on potential use of childcare and family preferences in combination with population estimates and data on existing licensed capacity. For families with children under age 6, the consulting team calculated a rate based on three factors:

- the share of families whose child was NOT in any form of non-parental care and answered “yes” when asked if they would use childcare if it were available and affordable to them;
- among families whose child was not in care and who indicated they would use childcare, the share who indicated they wanted or needed care five days per week; and
- among families whose child was in some form of non-parental care, the share who were not in full-time formal care and who indicated they wanted to change provider type.

Childcare Needs Assessment

This percentage of families who did not have full-time formal care but indicated they wanted it was then used to calculate the number of Estes Valley children in each age group who need care beyond the number able to be served in existing licensed settings.

There are three important considerations for the below estimates of unmet need:

- **They account for the demand for full-time care only:** The estimates reflect demand for full-time childcare, where full-time is defined as five days per week. Many families who participated in the family survey and focus groups indicated a preference or need for part-time care. Additional capacity beyond the numbers identified in this section would be required to meet the care needs of these families.
- **They assume care is affordable to families who want it:** These estimates are based in part on the share of families whose children were not in childcare but indicated they would use childcare if it were available *and affordable* to them. When asked how much they could or would pay for childcare per child on a monthly basis, the average amount reported by families whose children under 6 were not currently in childcare was \$398 per month. This amount equates to about \$20 per day, which is significantly below the daily rate charged by Estes Valley childcare providers. Without strategies to make care more affordable for families, the current demand for care would be significantly lower than what is included in the table above. The strategic plan includes several strategies for helping families afford care without sacrificing the financial sustainability of providers, and these strategies will be key for meeting the full unmet need for care in the community among those who are working and those who want to work.
- **They do not account for the small number of slots currently open in the community.** At the time of this writing, there were four open childcare slots in existing licensed settings for toddlers between the ages of 12 months and 2.5 and three open slots in licensed settings for preschool-age children. With high demand for childcare and children in all age groups on waitlists for care in some settings, it can reasonably be assumed that these open slots exist due to a mismatch between the options that are currently available and families' ability to pay, desired schedule, availability of transportation, working hours, or preferences for care.

Current Unmet Need for Children under 6

Based on the above methodology, it is estimated that the Estes Valley needs an additional 64 slots for infants and toddlers under age 2.5 and an additional 18 slots for preschool-age children. These numbers are in addition to the existing capacity in licensed settings.

| Age Group | Existing Licensed Capacity | Estimated Additional Full-Time Spots to Meet Demand |
|---|----------------------------|---|
| Infants and toddlers (children under 2.5) | 22 | 64 |
| Preschoolers (ages 2.5 to 4)* | 118 | 18 |

* These estimates are based on a definition of preschoolers that includes children ages 2.5 to 4 years old. Some 5-year-olds who are not yet in kindergarten may also be enrolled in preschool. If 5-year-olds were included in the model, it would increase the number of estimated additional full-time slots needed.

Childcare Needs Assessment

Methodology for School-age Children (Ages 5 to 12)

As noted previously in this report, the need for additional school-age care is more difficult to estimate due to the complexity of quantifying the capacity provided by existing options in the community. Licensed capacity for school-age children does not reflect all available options for after-school or summer care. The Boys & Girls Club is the only licensed after-school provider in the Estes Valley that specifically serves school-age children. During the summer, licensed options include the Boys & Girls Club and the YMCA of the Rockies summer programming for school-age children. However, families may employ other strategies to meet their childcare needs for this age group, such as after-school clubs, sports, camps, or Recreation District activities for which capacity is more difficult to quantify. Moreover, older children may not require constant supervision like younger children do. Thus, estimates for unmet need for care for school-age children should be used as a guidepost, rather than a specific target number of spots.

For the purposes of this needs assessment, school-age care is defined as care that is consistent, regular, ongoing, and aligned with working parents' schedules, regardless of licensed status. For the school year, the after-school programming offered by the Boys & Girls Club and the Recreation District meet this definition. For summer care, the programs provided by the Boys & Girls Club and the YMCA of the Rockies meet this definition. Since the available options and the care needs of many families differ between the school year and the summer, the consulting team calculated estimates of additional need for care for both time periods. Additionally, demand estimates are provided for two different levels of need within these time periods: the number of additional spots needed for families who reported wanting care at least three days per week and those who reported needing care at least five days per week.

Similar to the methodology for younger children, the consulting team calculated a rate based on select factors from the family survey. These factors included:

- The share of families whose school-age child was NOT in any form of non-parental care and answered “yes” when asked if they would use childcare if it were available and affordable to them;
- Among families who indicated they would use childcare, the share who indicated they wanted or needed care at least three days per week (Scenario 1) or at least five days per week (Scenario 2).

This percentage of families whose school-age child was not in any form of non-parental care who indicated they needed it was then used to calculate the number of Estes Valley children ages 5 to 12 who need care beyond the number able to be served in existing settings during the school year or summer.

Childcare Needs Assessment

Current Unmet Need for School-age Children

The below table includes estimates of current unmet need for childcare among families with school-age children, segmented by time of year and amount of care needed.

| Time of Year | Existing Licensed Capacity for School-age Children | Estimated <i>Additional</i> Spots to Meet Demand | |
|---------------|--|---|--|
| | | Scenario One (Families who Need Care <i>Three</i> Days Per Week) | Scenario Two (Families who Need Care <i>Five</i> Days Per Week) |
| School year | 52 | 164 | 46 |
| Summer months | 163 | 191 | 106 |

Methodology for Estimating Future Needs

The estimates of current need detailed above were used to forecast how the demand for childcare could change in future years based on population changes under two scenarios. The first scenario assumes that recent population trends (those observed between the 2010 and 2020 Decennial Censuses) continue into the future. The second scenario takes into account investments in workforce housing and goals for the number of additional housing units identified in the most recent Housing Needs Assessment and Strategic Plan.

Scenario One: Continuation of Recent Population Trends

The first scenario assumes that recently observed population trends in the Estes Valley—namely, a decline in the number of children—continue in future years. Using 2010 and 2020 Census data for three age groups (infants and toddlers, preschoolers, and school-age children), the consulting team calculated an annualized rate of population change. This rate of change was then applied to future years to arrive at an estimated population of children in each age group. Similar to the methodology for estimating current need, this estimated population was used along with existing childcare capacity and the percentage of parents who need but do not have full-time formal care for their child to calculate demand in future years.

Because this scenario assumes the population of children continues to decline in future years, it forecasts a slightly smaller number of additional slots needed by 2030 for some age groups, but unmet need is still significant.

Scenario One: Forecasted Additional Need for Childcare

| Age Group | Additional Slots Needed in 2027 (Above Existing 2024 Capacity) | Additional Slots Needed in 2030 (Above Existing 2024 Capacity) |
|--|---|---|
| Infants and toddlers | 61 | 60 |
| Preschoolers | 16 | 15 |
| School-age: | | |
| <i>School year, at least 3 days per week</i> | 164 | 163 |
| <i>School year, at least 5 days per week</i> | 46 | 46 |
| <i>Summer, at least 3 days per week</i> | 190 | 190 |
| <i>Summer, at least 5 days per week</i> | 105 | 105 |

Childcare Needs Assessment

Scenario Two: Investments in Workforce Housing

The second scenario takes into account the goal identified in the 2023 Housing Needs Assessment and Strategic Plan to create and preserve 550 to 700 dwelling units affordable to the workforce over a five- to seven-year timeframe. Creating more housing options for the workforce has the potential to bring more families with children to the community, impacting the need for childcare. To calculate estimates of childcare need under this second scenario, the consulting team applied the current percentage of Estes Valley households with children under 18 (15.6%) to the numerical goals for increasing workforce housing units to generate an estimate of the number of new dwelling units that may be occupied by families with children. This estimate of new households with children under 18 was then multiplied by the number of children per household in the Estes Valley, according to the most recent data (1.62 children per household). Finally, the existing age distribution among the child population was applied to generate estimates of the number of children in each age group who may move to the Estes Valley if housing goals are realized. These population estimates were then used, in conjunction with existing childcare capacity and the percent of parents who want but do not have full-time formal care, to generate estimates of potential future need for childcare if workforce housing goals are realized. Estimates are provided for 2030 to reflect the five- to seven-year timeframe identified in the Housing Needs Assessment and Strategic Plan published in 2023.

| Age Group | Additional Slots Needed by 2030 (above existing 2024 licensed capacity, assuming 550 new dwelling units) | Additional Slots Needed by 2030 (above existing 2024 licensed capacity, assuming 700 new dwelling units) |
|--|---|---|
| Infants and toddlers | 69 | 71 |
| Preschoolers | 22 | 23 |
| School-age: | | |
| <i>School year, at least 3 days per week</i> | 179 | 183 |
| <i>School year, at least 5 days per week</i> | 50 | 51 |
| <i>Summer, at least 3 days per week</i> | 211 | 217 |
| <i>Summer, at least 5 days per week</i> | 117 | 120 |

Childcare Needs Assessment

Family Focus Group Findings

Background and Methodology

The consulting team partnered with the Town of Estes Park and EVICS Family Resource Center to hold three focus groups with families who live or work in the Estes Valley in November 2023. Two focus groups were conducted in English, and one was conducted in Spanish. All participants were provided with a \$25 gift card in appreciation for their time and expertise, and dinner and childcare were provided. These focus groups were intended to gather important qualitative data on families' childcare needs and preferences, as well as how their childcare experiences were impacting their lives, their employment circumstances, and their ability to stay in the Estes Valley. The information collected through the focus groups adds deeper insights and nuance to the quantitative data collected from the family survey.

In total, 22 households with children were represented in the focus groups, including seven households who participated in the Spanish focus group. English focus group discussions were led by the consulting team, and the Spanish focus group was led by EVICS Family Resource Center and attended by the consulting team. Conversations were recorded for transcription and analysis, and the consultants then analyzed these materials to identify themes pertinent to the needs assessment. The following section summarizes important themes that arose from focus group conversations and that add context to data collected via the family survey.

Childcare challenges are straining families – financially and emotionally – and leading some families to leave the Estes Valley.

Families in the Estes Valley – particularly those with infants and toddlers – are making immense sacrifices and piecing together care to make things work in the absence of more formal, consistent childcare options. Participants shared stories of working opposite shifts from their spouse or partner, commuting long distances down the valley to access care for their children, and working remotely full-time while caring for children due to a lack of childcare options. Mothers were especially impacted by the shortage of childcare in the community. They shared stories of leaving their jobs, reluctantly shifting to part-time work, or trying to care for children while working. Many shared about the emotional and relationship strains these sacrifices cause for them and their family. Participants also shared stories of friends and colleagues who ultimately left the Estes Valley because they were unable to find childcare that met their needs.

“I had to take a big pay cut in order to switch around my roles so that I can work at night... so that we can have a child home. ... I do a lot of work after my kids go to bed, so I don't get enough sleep because I'm up working. ... Working just from nine to five ... sounds so nice. Instead, sometimes I'm awake until midnight doing work after my kids go to bed.”

– FOCUS GROUP PARTICIPANT

There is an acute need for care for infants and toddlers under age 2.5.

With fewer than 25 licensed slots for the estimated 209 children under age 2.5 in the Estes Valley, families with infants and toddlers struggle to find consistent childcare for their children. Families spoke about facing years-long waitlists for care for their babies or toddlers. Some noted that they had asked grandparents from outside of the Estes Valley or out-of-state to move in with them when their children were young due to a lack of childcare options for infants and toddlers. Others were left with no option but to try to work while caring for their young children, work opposite shifts from their spouse or partner, or drop out of the workforce during their children's earliest years.

Childcare Needs Assessment

“I’ve been on waitlists for a few different daycares for [my child] since I was pregnant and I haven’t gotten off of them - and she’s two and a half years old now.” – FOCUS GROUP PARTICIPANT

Trust, stability, and flexibility of care are some of the most important factors families consider when seeking childcare arrangements for their children.

Across all focus groups, families spoke frequently about the necessity of being able to trust the people caring for their children and know that their children would be safe. They also expressed a need for care that was stable and reliable, with many citing an ever-present fear based on previous experiences that their provider could close and leave them without a viable childcare option. Flexibility was also an important value for families, with many expressing a desire for care options that would allow their children to attend less than full-time or would allow for drop-in care.

Participants also spoke about the difficulty of being able to consider these factors when care is so limited that they feel forced to take the first option available to them.

“I don’t think we have the luxury of prioritizing what we want. We just hope...there’s something open.” – FOCUS GROUP PARTICIPANT

Families whose children are not in formal childcare cite affordability as a key barrier.

Although childcare costs in the Estes Valley are below the statewide averages, many families—particularly those whose children were not in any form of formal childcare—experience care as unaffordable. Many parents who stayed home with their children expressed a desire for at least a few days per week of childcare but shared that the cost of care would be equivalent to or more than any income they could earn.

“It doesn’t make sense for me to go and put [my kids] in childcare. It would be my whole salary.” – FOCUS GROUP PARTICIPANT

Although there are public and private assistance programs to help families afford the cost of care, some families felt that applications for different forms of childcare assistance failed to consider the high cost of living in the Estes Valley. They mentioned that their paychecks make it appear that they do not need childcare assistance, when in reality they are spending nearly all of their income on rent, gas, food and other bills, with very little left over for childcare.

Families employed in the tourism and hospitality industries struggle to find care during the evenings and on weekends.

No licensed providers in the Estes Valley are open past 5:30 p.m., and only one small home-based provider is open on Saturdays – leaving parents who work in hotels, restaurants or other tourism-related industries in a bind. This challenge emerged among Spanish-speaking families in particular, with some sharing how difficult it was to piece together care from family members or friends while they worked evenings or weekends.

Childcare Needs Assessment

Finding care during the summer and on school breaks or holidays is difficult for families with children of all ages.

Participants with young children and those with school-age children often mentioned having trouble finding consistent care during the summer and on school holidays that do not align with their work schedules. Some families noted they could use up all their employer-provided paid time off to care for their children when schools are closed.

The seasonal nature of many jobs in the Estes Valley creates challenges for parents who work in these industries.

Families who work in jobs where hours and pay vary significantly on a seasonal basis noted that these circumstances create challenges related to their childcare arrangements. They shared that the cost of care is difficult to afford during the winter when they are working fewer hours, but they have to continue to take their child to childcare during these months to avoid losing their spot or because of tuition policies and daycare agreements.

Families want greater diversity of programming options.

Every family has their own values and educational goals for their children. Some families who participated in focus group discussions expressed a desire for traditional academic-based early learning programs, and others had strong preferences for outdoor or nature-based programs, language immersion programs or programs following a specific learning model such as Waldorf or Montessori. Overall, families expressed a desire for a greater variety of choices in the Estes Valley to ensure they could find a program that aligned with their values.

Childcare Needs Assessment

Employer Experiences

The consulting team sent out an informal questionnaire to businesses in the Estes Valley and contacted several business owners by phone and email to understand how childcare challenges have impacted their businesses. In addition, several family focus group participants were also business owners and shared about impacts to their businesses during focus group conversations. The number of businesses represented in these data is small (about 10), and so findings should be considered anecdotal rather than scientific.

All employers contacted reported that they had to do one or more of the following due to the childcare needs of their employees:

- made adjustments to employees' schedules;
- provided flexibility to employees;
- lost one or more potential employees;
- allowed one or more employees to bring their child(ren) to work because they did not have other childcare;
- made adjustments to the operations of their business;
- lost revenue or profit; or
- lost productivity due to a lack of childcare.

Employers also shared that they know their employees struggle to afford childcare and that they have difficulty finding childcare on evenings and weekends. They reported that the lack of childcare in the community serves as a barrier to retaining staff, noting instances when staff members left when they had a baby because there were no care options. Employers also shared that they have missed out on hiring talented employees because of a lack of care for employees' children in the community.

Comments from employers included:

“Lost productivity is one issue, but morale, stress levels, equitable treatment, and the ability for employees to feel well-rounded and successful are predicated on a stable and affordable childcare environment.” – ESTES VALLEY EMPLOYER

“I lost a full-time managerial employee because of her inconsistent childcare situation; she made the decision to quit. In Estes Park, tourism requires the bulk of your workforce to work weekends and childcare is either very expensive or nonexistent on the weekend.”

– ESTES VALLEY EMPLOYER

“When the people apply, they say, ‘I can work Monday to Friday, but not weekends.’ So don’t hire the people because we get more tourists on the weekends. It is hard to take people in. Not just us, but most of the employers require people to work on the weekend.”

– ESTES VALLEY EMPLOYER

Childcare Needs Assessment

Provider Experiences, Barriers, and Challenges

Background and Approach

The consulting team interviewed each licensed provider operating in the Estes Valley, as well as one former provider and one informal care provider. Conversations focused on challenges providers face related to operating a childcare program in the Estes Valley, barriers to operating or expanding, and the types of support providers would find helpful. Staff at center- or school-based programs were also invited to complete a questionnaire designed to understand their experiences working for childcare providers in the community. The following section summarizes providers' and staff's experiences working in childcare in the Estes Valley and highlights prevalent challenges that could be addressed using 6E funds.

Acute Shortage of Infant and Toddler Care

Only three of six licensed providers in the Estes Valley serve infants and toddlers under 2.5, and only two of these providers (both of which are licensed family childcare homes) serve infants under 12 months. Nearly all providers noted the crisis in availability of infant care in the community. One in-home provider expressed a desire to serve more infants and toddlers to help parents in dire need of care and was interested in learning about any potential options to be able to do so.

Difficulty Recruiting and Retaining Staff

All center- or school-based providers spoke of significant challenges with hiring or retaining enough staff. Because childcare regulations have strict ratio requirements that dictate how many staff must be in the room with children at all times, staffing challenges can lead to major disruptions in the ability to provide care. These ratio requirements mean that childcare providers typically need to “overstaff” in case a staff member needs to take time off or to allow for breaks and planning time for teachers. Some providers in the Estes Valley noted that insufficient staffing levels occasionally lead them to have to close rooms for the day or pull staff from other areas if a teacher or aide calls in sick or needs to take time off. Some providers expressed a need for a substitute pool or floating substitute who could fill in at Estes Valley programs when needed. Overall, staffing shortages were cited as a major barrier to operating or expanding programs, and these challenges were consistent across providers serving all age groups.

Low wages, high cost of living, housing challenges, and a lack of childcare for staff's own children emerged as common reasons why providers struggle to recruit and retain teachers and aides. Average wages for childcare program staff in the Estes Valley are below the living wage of \$24.52 per hour for a single adult in Larimer County. Combined with a high cost of living (and high housing costs, in particular), these low wages make it difficult for childcare teachers or staff to move to or stay in the Estes Valley.

Some providers also expressed a particular need for more bilingual staff to meet the needs of the children and families they serve. The Estes Valley has a sizable Hispanic/Latino population, and 16% of students enrolled in the Estes Park School District were identified as English Language Learners in the 2023-24 school year.⁶³ Many providers expressed a desire to provide bilingual instruction but noted that it has been difficult to recruit and retain bilingual teachers.

Childcare Needs Assessment

Challenges with Licensing Regulations

Some providers also cited state licensing regulations—as well as a lack of support for understanding and ensuring they are meeting these regulations—as a burden. Providers generally felt the licensing process was important but shared that it could be confusing for them to navigate, and they thought that this process could be especially difficult for potential new providers attempting to get licensed for the first time. One provider also noted frustration with the classes required to maintain a license, sharing that they can be repetitive, difficult for Estes Valley providers to attend since many are offered down the valley, and that some are only offered in English.

Balancing Keeping Rates Affordable with Need for Financial Sustainability

Nearly all providers expressed genuine concern for parents' ability to afford their care, with some noting they try to keep their rates low to reduce the financial burden on parents who are struggling to get by. However, providers also noted the strain this causes in terms of their own financial sustainability.

Many providers reported receiving revenue from public and private programs designed to make childcare more affordable for families (e.g., Universal Preschool Colorado, the Colorado Child Care Assistance Program, EVICS tuition assistance, etc.) but noted that keeping up with the requirements and administrative burdens associated with each of these programs can be challenging.

Ebb and Flow of Seasonal Employment

As a community with a significant amount of employment related to tourism, many parents face seasonal ebbs and flows in their employment status, hours worked, need for childcare, income, and eligibility for assistance programs. Providers noted that these seasonal variations can present challenges for them, too, as parents' ability to pay and their childcare needs change throughout the year, leading to inconsistency in attendance and revenue.

More Training and Support for Informal Care Providers

With a shortage of licensed care options for some age groups and for non-traditional days or hours, informal or license-exempt childcare providers are an important part of the childcare ecosystem in the Estes Valley. Since many state-administered professional development opportunities are geared toward licensed providers, training opportunities for these informal care providers can be limited. One informal care provider interviewed as part of the needs assessment noted the strong desire for more training or educational opportunities for these license-exempt providers in the community. Areas of interest included CPR or first aid training and training on children's social-emotional development and how providers can support it.

Conclusion

The Impact of Inadequate Childcare for the Estes Valley

Conversations and data collection efforts with families, providers, employers, and community partners indicate clearly that the existing amount of childcare is insufficient to meet the needs of Estes Valley families. The impacts of inadequate childcare ripple out beyond individual families struggling to find care for their children. When communities lack sufficient childcare to meet demand, nearly everyone pays a price: employers struggle to hire and retain employees, communities become less vibrant when families with children move away, and the local economy suffers when parents who are forced out of the workforce have less income to spend or save. In aggregate, these costs are steep. A recent report on the cost of the infant-toddler childcare shortage in Colorado found that insufficient care for this age group alone costs parents, businesses, and the state \$2.7 billion each year.⁶⁴

The following section summarizes the impact of inadequate childcare for the Estes Valley community, including children, families, and employers.

Impacts on the Child, Family, and Community

The earliest years of life are a critical time for brain development. The quality of children's experiences during these early years builds the foundation for everything that comes later, including success in school and in the workforce. Decades of research have found significant and sustained positive impacts for children who participate in high-quality early care and learning programs. These impacts include higher test scores, increased likelihood of graduating from high school, and improved physical health as an adult.⁶⁵ Generally, the societal return on investments in high-quality early childhood experiences is considered to far exceed the cost.⁶⁶

When families do not have the care they need, not only do many children miss out on the positive effects of early care and learning programs, but their families and communities pay a steep price as well. ReadyNation's economic analysis of the costs of inadequate childcare for infants and toddlers found that insufficient care for young children costs families in Colorado an annual average of \$5,910 per working parent in lost earnings and in more time spent looking for work.⁶⁷ The study also found that inadequate childcare for infants and toddlers costs Colorado taxpayers an annual average of \$1,390 per working parent in lower income taxes and sales tax revenue.⁶⁸

Families who participated in focus group discussions often mentioned that childcare challenges caused hardships in areas of their lives beyond employment. Many noted the impacts that childcare-related problems had on their mental health and their ability to remain in the Estes Valley after having children. These conversations prompted the inclusion of questions focused on these topics in the family survey.

Conclusion

When asked whether childcare challenges had affected their mental well-being, more than half of respondents (53%) answered “yes.” Sample responses included:

“We constantly feel like the deck is stacked against us. Never getting ahead... always failing. The financial strain and lack of coverage has made daily stress and anxiety commonplace in our home... We try to keep a straight face for the kids but it’s tough.”

“Of course, it is very worrying not to have childcare, wondering if you will have someone to take care of them the next day or if the child will be okay if left with a person not qualified in childcare.” [response translated from Spanish]

“Yes, when I can’t find childcare or can’t afford it then I have to miss work and hope that I can pay bills/rent for the month. I don’t like having my children seeing me struggle for basic needs.”

When asked whether childcare challenges had ever caused them to consider moving away from the Estes Valley, two in five respondents (41%) said yes. Sample responses included:

“We moved from Estes Park due to a lack of childcare. We had our first child there and tried to make it, but as soon as we got pregnant a second time we immediately moved down the hill.”

“We have lost childcare a few times and relied on schedule changes and having grandma drive up ... every day to help. These weren’t sustainable answers, and eventually we would have moved because any alternative we could think of would be more expensive than we could afford.”

Impacts to Workforce Acquisition and Retention

Childcare is vital social infrastructure that supports people’s ability to work, earn a living for their families, and contribute to the economy. When there is a shortage of childcare in a community, employers struggle to recruit and retain employees. Studies have linked accessibility and affordability of childcare to labor force participation and work hours, especially among mothers.^{69,70} As detailed in a previous section of this report, employers reported that they are experiencing many different types of impacts due to employees’ lack of access to childcare.

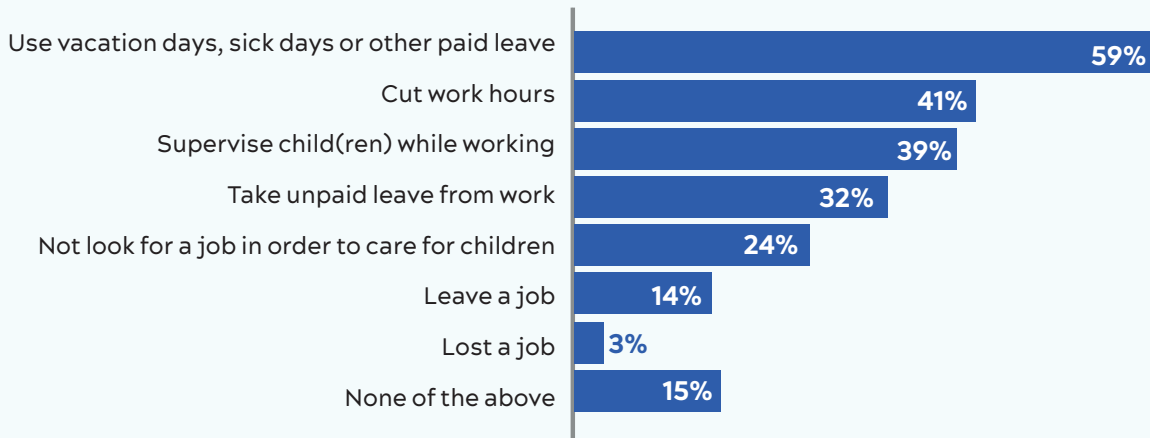
The family survey asked Estes Valley parents about the impact of childcare problems on their ability to find or keep stable employment. Approximately 42% of all respondents indicated that they or someone in their family had had to leave a job, not take a job, or greatly change their job due to problems with childcare in the past 12 months. Respondents with children under 6 were slightly more likely to report job changes due to childcare than those with school-age children.

When asked about specific impacts on their employment, most families reported at least one type of employment disruption due to childcare problems. More than half of respondents reported that problems with childcare had caused them to use vacation days, sick days, or other paid leave, and more than 40% reported cutting their work hours due to problems with childcare. Approximately one in seven reported having to leave a job due to problems with childcare. Only 15% of respondents reported that they had not experienced any of these employment disruptions.

Conclusion

MOST SURVEY RESPONDENTS REPORTED EXPERIENCING AT LEAST ONE TYPE OF EMPLOYMENT DISRUPTION DURING THE PAST 12 MONTHS DUE TO PROBLEMS WITH CHILDCARE.

Percent of family survey respondents indicating they had experienced specific employment disruptions due to problems with child care



Looking Forward and Measuring Success

It is often said that everyone depends on someone who depends on childcare. The lack of sufficient childcare options in the Estes Valley affects everyone, including residents without their own young or school-age children. A strong childcare system is a vital piece of a thriving community – one where families can find and afford the care they need, childcare providers can meet their own basic needs, and employers find the talent to help them build successful businesses.

As this plan is implemented, it will be important to assess whether the Town of Estes Park and its partners are moving the needle on meeting the childcare needs of the workforce. Success can be defined by:

- children and families staying in the Estes Valley;
- parents having choices for childcare that align with their needs and values;
- enough childcare capacity for all families;
- childcare that can be accessed when it is needed;
- childcare that is affordable; and
- providers that are sustainable and reliable.

The goals of this strategic plan are ambitious, and with the passage of 6E, the Estes Valley has demonstrated the desire and dedicated the resources to be a community that supports its residents by ensuring access to affordable childcare that meets families' needs. The investment in a comprehensive needs assessment and community-driven plan for allocating 6E childcare funds has equipped the Town of Estes Park with critical data on the need for additional childcare capacity and a set of strategies that can help the community achieve its vision that **working families have consistent access to childcare that allows them to live, work, and thrive in the Estes Valley.**

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