



Parachute to Aspen Licensed Provider Survey Data Report: Data as of October 2023

Summary

From Parachute to Aspen, there were approximately 2,459 licensed child care slots as of October 2023 for more than 5,200 children under age 5, plus additional children who are 5 years old and not yet in kindergarten. Licensed capacity in the Roaring Fork and Colorado River Valleys' child care centers, family child care homes and preschools was only sufficient to serve a maximum of 47% of the region's population of children under 5 as of October 2023.

It is important to note that the number of licensed child care slots includes some part-time slots; the number of slots able to serve children full-time is even more limited than what the numbers above illustrate.

Methods

The survey of licensed child care providers in the Roaring Fork and Colorado River Valleys was conducted between October and December 2023 via SurveyMonkey. Respondents were instructed to provide their capacity numbers as of October 2nd, 2023. All licensed providers from Parachute to Aspen were first contacted via e-mail and asked to complete the survey. The CECE Coalition Director and members of the coalition conducted follow-up efforts via e-mails and phone calls to providers. By December 2023, 70 of 73 providers responded to the survey. Two providers declined participation, and one provided capacity data via e-mail.

Capacity data for the two providers who declined participation in the survey were pulled from the Colorado Licensed Child Care Facilities Report for October. Each provider who completed the survey received a \$25 gift card in appreciation for their time.

Population estimates for children under 5 were obtained from the U.S. Census Bureau's 2018-2022 American Community Survey 5-Year Estimates.

Notes

The demand for child care at the community level is difficult to quantify. This report aims to provide an estimate of the share of children under 5 in the Roaring Fork and Colorado River Valleys who could be served in a licensed child care setting, while recognizing that families with young children have varying needs and preferences for child care. The report uses licensed capacity in child care centers, family child care homes and preschools as a rough estimate of the number of children who can access licensed care. This method likely overestimates the share of young children who can be served in a licensed setting due to the nuances of providing child care and shortcomings of existing data systems.

Aspen Ski Company's licensed child care capacity was excluded from capacity calculations in this report due to the unique nature of their program and the fact that a portion of their slots serve tourists.

Acknowledgments

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The CECE Coalition is deeply appreciative of its coalition members and extends special thanks to members and supporters who offered their expertise on this survey and dedicated their time to following up with providers:

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- Sam Markovitz, Eagle County
- Stacy Petty, Rocky Mountain Early Childhood Council
- Susana Postigo Montero, Aspen Valley Hospital

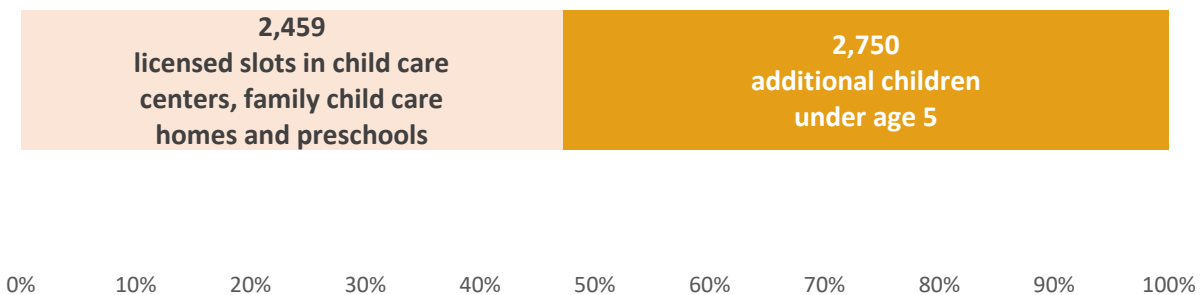
Child Care Capacity in the Roaring Fork and Colorado River Valleys

Ask most working parents about their experiences finding child care, and you'll likely hear stories of joining years-long waitlists, straining family budgets to afford tuition, or even dropping out of the workforce altogether because of challenges related to finding or affording care. Across Colorado, one in eight children ages birth to 5 lives in a family in which someone had to quit a job, not take a job or change their job due to problems with child care.¹ In part due to a lack of public investment in child care, the amount of licensed care available to families falls woefully short of the need in most communities, including the Roaring Fork and Colorado River Valleys.

The results of a survey of the region's licensed child care providers are clear: child care capacity from Parachute to Aspen is insufficient to meet the needs of our region's families with young children. Data collected via the survey indicate that **fewer than half of all children under 5 (47%) in the region could be served in a licensed setting in the Roaring Fork and Colorado River Valleys as of October 2023.** As of October 2023, there were approximately 2,459 child care slots in licensed child care centers, family child care homes and preschools for the more than 5,200 children under 5 who call the region home.

Fewer than half of all children under 5 (47%) in the Roaring Fork and Colorado River Valleys could be served in a licensed child care setting in the region as of October 2023.

Licensed child care capacity as a percent of total children under age 5 in the Roaring Fork and Colorado River Valleys



Sources: Licensed capacity data from the 2023 CECE Licensed Child Care Provider Survey. Population estimates from the U.S. Census Bureau, 2018-2022 American Community Survey 5-Year Estimates.

It is important to note that the number of licensed child care slots is an overestimate of the actual number of children who can access licensed child care for a few reasons:

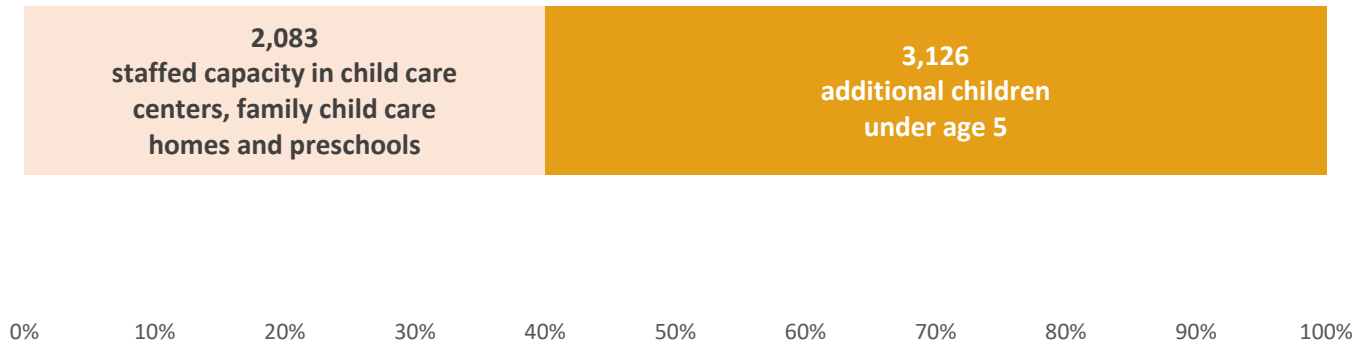
- **Licensed vs. desired and staffed capacity:** Although providers are licensed for a certain number of spots, they often serve fewer children in practice – either because they prefer to keep smaller child-to-staff ratios or because they cannot hire or retain enough staff to keep all their classrooms open or at full capacity. In addition to licensed capacity, the survey asked providers

to report their staffed capacity (the number of children they were currently able to serve based on their staffing levels). **Staffed capacity for the Roaring Fork and Colorado River Valleys was 2,083 slots, bringing the overall percentage of young children who could be served in a licensed setting down to 40%.**

- **Exclusion of 5-year-olds not yet in kindergarten:** The child population estimates used for this calculation do not include 5-year-olds who are not yet in kindergarten and potentially need child care. If it were possible to obtain and include data on the number of 5-year-olds still in need of child care, the gap between licensed capacity and the young child population would be even larger.
- **Part-time vs. full-time slots:** Licensed capacity numbers include both part-time and full-time slots. Part-time slots are likely insufficient for many working families.

When accounting for staffing levels at the region's child care providers as of October 2023, providers could only serve 40% of children under 5.

Staffed child care capacity as a percent of total children under age 5 in the Roaring Fork and Colorado River Valleys



Access to Child Care: Why It Matters for Families and Communities

Decades of research have established the importance of the earliest years of life and the need for nurturing caregivers and environments that support the rapid brain development that occurs during this timeframe. The majority of young children live in families where all available parents are in the labor force, meaning they likely need some form of child care during the day.² Child care providers nurture children's social, emotional and cognitive development, partnering with parents and families to equip children with the skills and knowledge on which they will build throughout their lives.

Child care is also critical infrastructure that allows parents to work to support their families – but the numbers in this report show that access to child care in the Roaring Fork and Colorado River Valleys is likely insufficient to meet the needs of all families who would choose it. When families are unable to access the child care they need, many are forced to reduce their work hours, take unpaid leave from work, or drop out of the workforce entirely to care for children. Given the importance of access to child care, the shortage of child care throughout the Roaring Fork and Colorado River Valleys is almost certainly making it more difficult for families and employers to thrive.

The Vital Role of Family, Friend and Neighbor (FFN) Providers

Family members, friends and neighbors who care for children other than their own (often referred to as FFN providers) are an indispensable part of the child care landscape. National research indicates that FFN care is the most common form of non-parental child care, and many families prefer this form of care for its cultural relevance, flexibility, familiarity or affordability. FFN providers also fill a critical gap for families who are unable to access licensed care in their communities.

Although surveying FFN providers was outside the scope of this year's child care survey, it is reasonable to assume that they provide child care for a sizable portion of young children in the Roaring Fork and Colorado River Valleys. According to the 2018-2022 American Community Survey 5-Year Estimates, approximately 76% of young children in the region live in households where all parents are in the labor force, meaning they likely need child care by someone other than a parent at some point during the week. Applying this percentage to the population of children under 5 in the region, it is estimated that more than 3,900 young children in the Roaring Fork and Colorado River Valleys are in need of child care at some point while their parents work. **With only 2,459 child care slots in licensed child care settings, many of the remaining 1,500 young children who have all parents in the workforce but cannot be served in a licensed setting are likely cared for by an FFN provider—more than a quarter of all young children in the region.** Ensuring that FFN providers can access training, resources and support is essential to creating and sustaining a strong child care system in the region.

Sources: Park, M. & Peña, J.F. (2021). The invisible work of family, friend, and neighbor caregivers and its importance for immigrant and dual language learner families. Migration Policy Institute. Nevins, et al. (2023). Understanding the strengths of family, friend and neighbor child care. Home Grown and Mathematica.

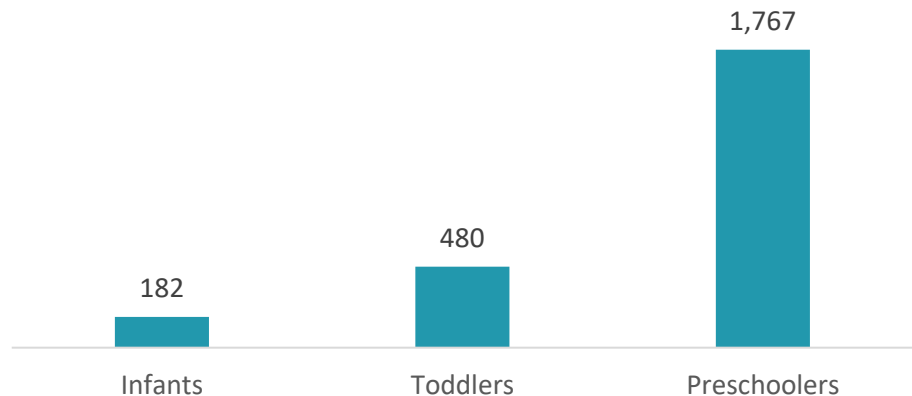
Child Care Capacity by Age Group

Looking only at overall licensed capacity provides an incomplete picture of the child care landscape and obscures how capacity

varies widely by age group. Infants and toddlers require lower child-to-staff ratios than preschool-aged children, so slots are typically much more limited for children in these very young age groups. Infant care is especially scarce: from Parachute to Aspen, there were only 182 licensed slots for infants as of October 2023. Although population estimates are not available for infants

specifically, **births data from the Colorado Department of Public Health indicate that more than 940 babies were born to Roaring Fork and Colorado River Valley residents in 2022 – more than five times the number of licensed child care slots for infants in the region.**

Licensed Capacity by Age Group,
Roaring Fork Valley Total



For the purposes of the CECE Licensed Provider Survey, age groups were defined as follows:

- **Infants:** Under 18 months old
- **Toddlers:** 18 months old to 36 months old
- **Preschoolers:** 3 years old to 5 years old, not yet in kindergarten

These age ranges differ slightly from those defined in state licensing regulations, which use overlapping age groups to allow for some flexibility in the classrooms in which children are served based on their developmental stage.

Child Care Capacity by Location

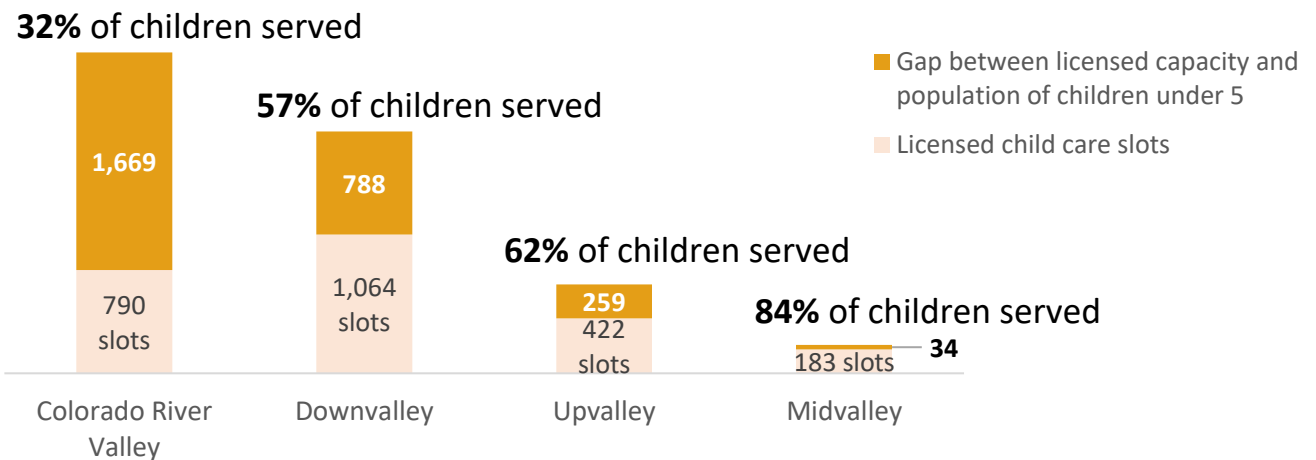
Licensed child care capacity varies substantially across the Roaring Fork and Colorado River Valleys. The following sections examine capacity by region (defined as the Colorado River Valley, Downvalley, Midvalley and Upvalley), as well as by county. These data are provided with the recognition that the Valley is economically and socially interconnected in ways that cross these geographic boundaries. Many residents travel from one part of the Valley to another for work or school and thus may choose a child care provider in a different area than the one in which they reside. However, the data in the following sections can still provide valuable information about the availability of child care options within each community.

Child Care Capacity by Region

Child care capacity and population data by ZIP code were aggregated to create a regional picture of child care availability for four regions in the area: the Colorado River Valley, Downvalley, Midvalley and Upvalley. See the table below for a breakdown of how ZIP codes were assigned by region.

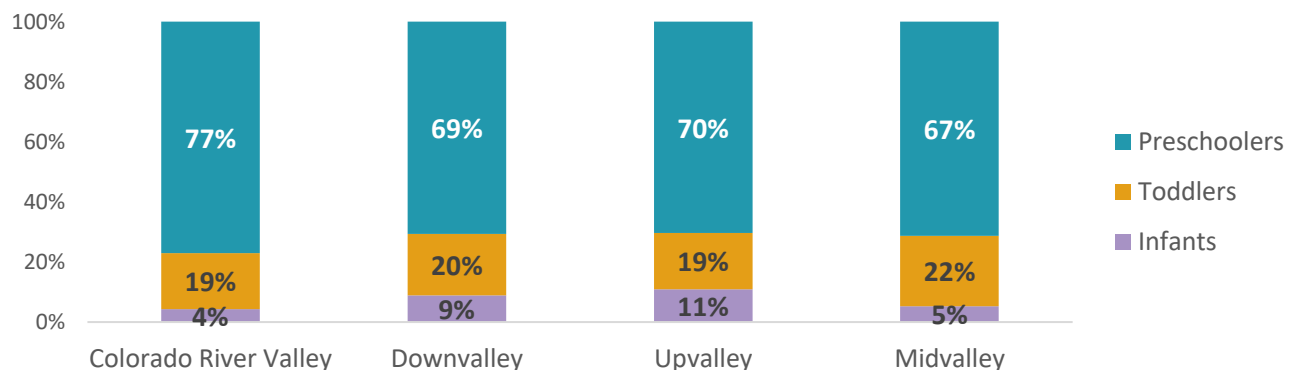
Region	ZIP Codes Included
Colorado River Valley (Parachute to New Castle)	81635, 81647, 81650, 81652
Downvalley (Glenwood Springs to Carbondale)	81601, 81623
Midvalley (El Jebel/Basalt)	81621
Upvalley (Old Snowmass to Aspen)	81611, 81612, 81615, 81654, 81656

The gap between the number of licensed child care slots and the population of children under 5 ranges from 34 in the Midvalley region to 1,669 in the Colorado River Valley. The label at the top of each bar shows the percent of children under 5 who could be served in a licensed slot.



The age distribution of licensed slots varies slightly by region, but slots for preschoolers make up the majority of licensed care in each part of the Roaring Fork and Colorado River Valleys.

Licensed capacity by age group as a share of total capacity, by region



Colorado River Valley (Parachute, Battlement Mesa, New Castle, Rifle, Silt)

Licensed providers: 28 (12 child care centers, preschool programs or mobile preschools | 16 family child care homes)

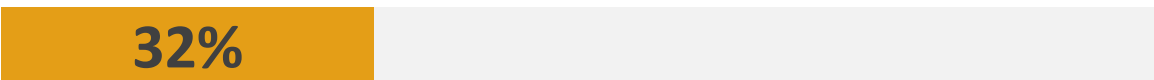
Licensed child care capacity: 790 slots (34 infant slots | 147 toddler slots | 609 preschool slots)

Licensed child care capacity as a percent of children under 5: 32%

Staffed child care capacity as a percent of children under 5: 25%

Gap between licensed child care capacity and population of children under 5: 1,669

Licensed child care capacity in the Colorado River Valley is



of the population of children under 5.

The Colorado River Valley faces the most acute shortage of child care in the region. Licensed capacity could only serve 32% of children under 5 (790 slots for nearly 2,460 kids). Infant slots were particularly limited, with only enough licensed infant slots to serve 7% of the babies born in the area in 2022. Family child care homes make up the majority of licensed providers in this region.

Downvalley (Glenwood Springs, Carbondale)

Licensed providers: 30 (21 child care centers, preschool programs or mobile preschools | 9 family child care homes)

Licensed child care capacity: 1,064 slots (93 infant slots | 214 toddler slots | 739 preschool slots)

Licensed child care capacity as a percent of children under 5: 57%

Staffed child care capacity as a percent of children under 5: 51%

Gap between licensed child care capacity and population of children under 5: 788

Licensed child care capacity in the Downvalley region is



of the population of children under 5.

The Downvalley region had enough licensed slots in October 2023 to serve approximately 57% of all children under 5 in the area (1,064 slots for 1,852 kids). The shortage of infant slots was more severe. There were only 93 licensed infant slots for 340 babies born the previous year, or enough slots for approximately 27% of babies born in 2022. Child care centers and preschools make up the majority of licensed providers in the Downvalley region.

Midvalley (Basalt)

Licensed providers: 4 (3 child care centers or preschools | 1 family child care home)
Licensed child care capacity: 183 slots (9 infant slots | 40 toddler slots | 122 preschool slots)
Licensed child care capacity as a percent of children under 5: 84%
Staffed child care capacity as a percent of children under 5: 82%
Gap between licensed child care capacity and population of children under 5: 34

Licensed child care capacity in the Midvalley region is



of the population of children under 5.

The number of licensed slots as a percent of the population of children under 5 is highest in the Midvalley region, with licensed capacity at 84% of children under 5 (183 slots for 217 kids). Infant care, however, is very limited. There were 56 babies born in the Midvalley region in 2022 but only nine licensed infant slots as of October 2023. The number of infant slots could only serve 16% of babies born in the area in 2022. Child care centers and preschools make up the majority of licensed providers in the Midvalley region.

Upvalley (Aspen, Snowmass Village, Woody Creek)

Licensed providers: 10 (10 child care centers or preschools)
Licensed child care capacity: 422 slots (46 infant slots | 79 toddler slots | 297 preschool slots)
Licensed child care capacity as a percent of children under 5: 62%
Staffed child care capacity as a percent of children under 5: 53%
Gap between licensed child care capacity and population of children under 5: 259

Licensed child care capacity in the Upvalley region is



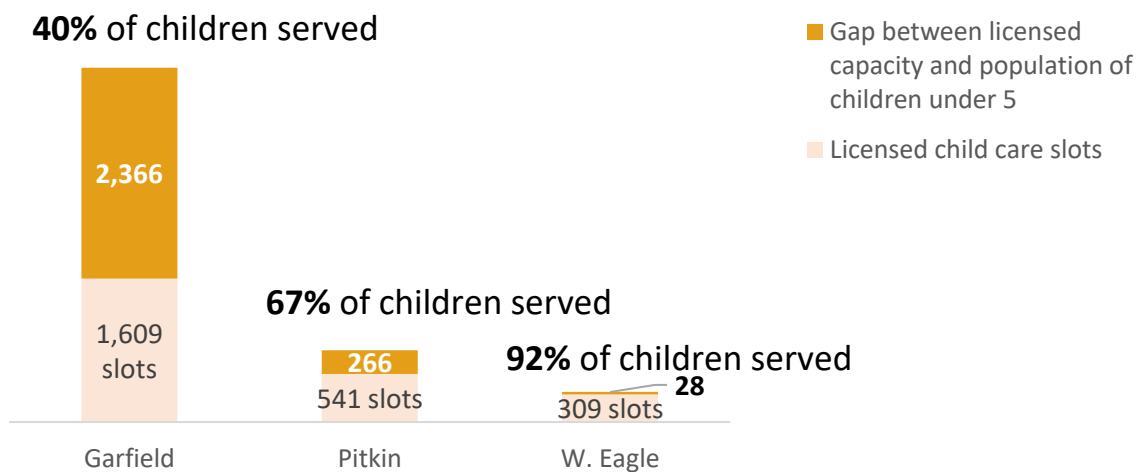
of the population of children under 5.

Licensed child care capacity in the Upvalley region was approximately 62% of all children under 5 (422 slots for 681 kids). Infant capacity as a percent of babies born was highest in this region, with enough infant slots for approximately 49% of babies born in 2022. All licensed providers in the Upvalley region were child care centers or preschools; there were no licensed family child care homes in the Upvalley area as of October 2023.

Capacity by County

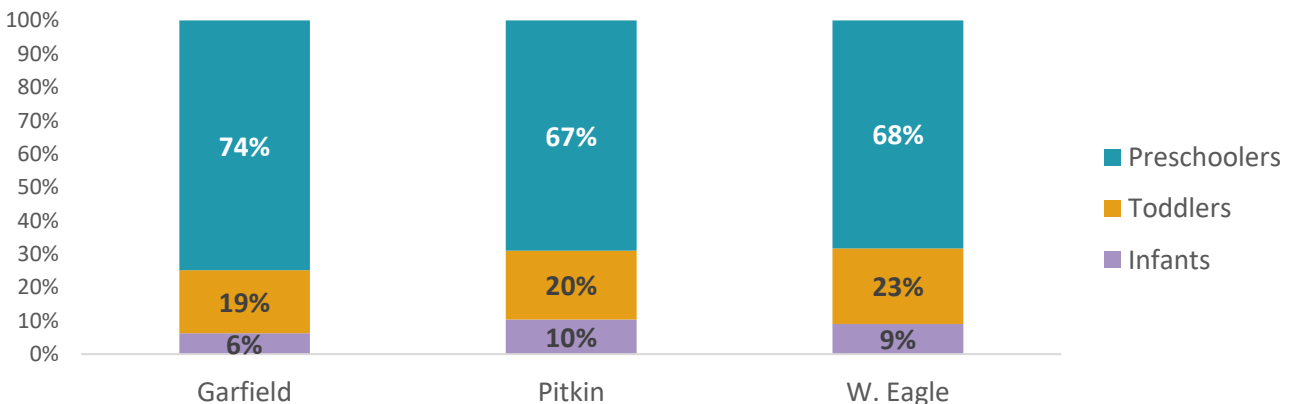
The Roaring Fork and Colorado River Valleys encompass Garfield County, Pitkin County, and a portion of western Eagle County. Licensed child care capacity as a share of the population of young children varies significantly across counties. Again, it is important to consider that some families likely cross county lines to access child care, but these numbers can help shed light on where capacity is most limited relative to the population.

Among the counties in the Roaring Fork and Colorado River Valleys, **Garfield County** has the largest gap between licensed child care capacity and the population of children under 5. The label at the top of each bar shows the percent of children under 5 who could be served in a licensed slot.



Slots for preschool-aged children comprise the majority of licensed child care slots in each county.

Licensed capacity by age group as a share of total capacity, by county



Garfield County

Licensed providers: 53

Licensed child care capacity: 1,609 slots (99 infant slots | 301 toddler slots | 1,191 preschool slots)

Licensed child care capacity as a percent of children under 5: 40%

Staffed child care capacity as a percent of children under 5: 33%

Gap between licensed child care capacity and population of children under 5: 2,366

Licensed child care capacity in Garfield County is



40%

of the population of children under 5.

Among the three counties included in the Roaring Fork and Colorado River Valleys, Garfield County has the lowest percentage of children under 5 who could be served in a licensed child care slot. As of October 2023, there were 1,609 licensed slots in Garfield County's child care centers, family child care homes and preschools – enough for about 40% of the nearly 4,000 children under 5 who live in Garfield County. The number of licensed slots for infants was only 13% of the number of births in Garfield County in 2022.

Pitkin County

Licensed providers: 13

Licensed child care capacity: 541 slots (55 infant slots | 109 toddler slots | 365 preschool slots)

Licensed child care capacity as a percent of children under 5: 67%

Staffed child care capacity as a percent of children under 5: 59%

Gap between licensed child care capacity and population of children under 5: 266

Licensed child care capacity in Pitkin County is



of the population of children under 5.

The number of licensed child care slots in Pitkin County was sufficient to serve about two-thirds of the population under 5 – higher than the average across the Roaring Fork and Colorado River Valley regions. As in other counties, infant care is more limited. Pitkin County had 55 licensed infant slots as of October 2023, or approximately 41% of the 134 births that occurred in 2022.

West Eagle County

Licensed providers: 6

Licensed child care capacity: 309 slots (28 infant slots | 70 toddler slots | 211 preschool slots)

Licensed child care capacity as a percent of children under 5*: 92%

Staffed child care capacity as a percent of children under 5*: 85%

Gap between licensed child care capacity and population of children under 5*: 28

*Population estimates for West Eagle County were derived by applying the portion of Basalt's total population that lives within Eagle County to the child population of Basalt to create an estimate of the number of children under 5 living in the portion of Basalt that is within Eagle County. This number was then added to the population of children under 5 living in El Jebel.

Licensed child care capacity in Eagle County is



of the population of children under 5.

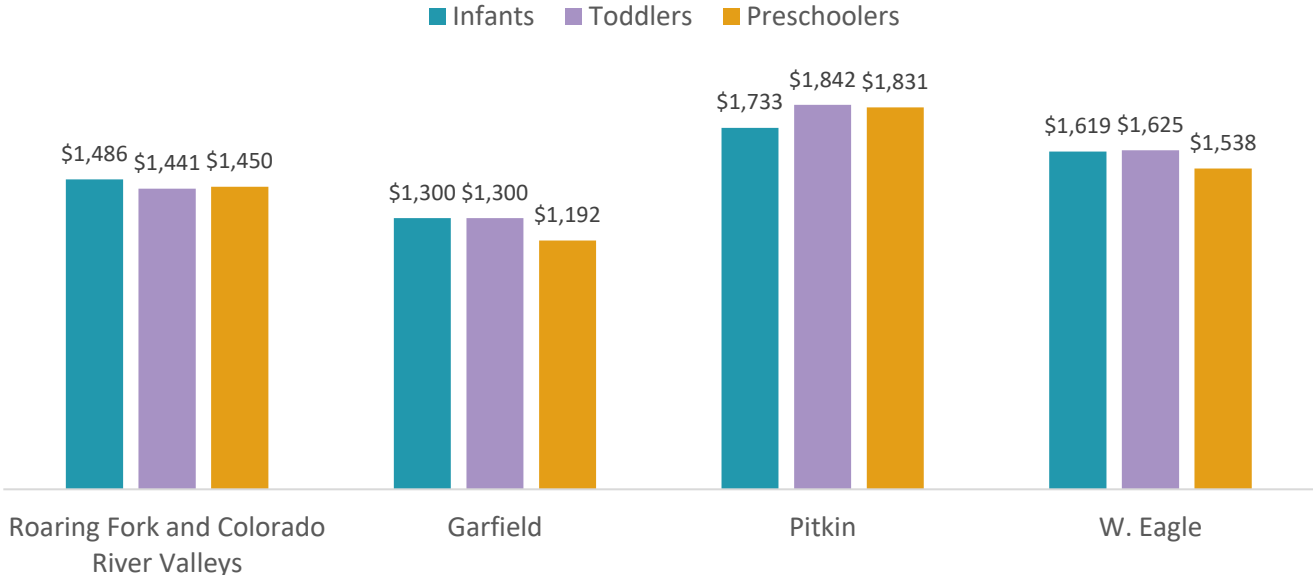
The number of licensed child care slots at providers located within the small portion of western Eagle County that is part of the Roaring Fork Valley was approximately 92% of the estimated population of children under 5. Given this area’s proximity to nearby Garfield and Pitkin County communities, it is likely that many children who reside in the other two counties attend providers in Eagle County and vice versa. The West Eagle portion of the Valley is also a very convenient location for parents to drop their children off at child care on the commute Upvalley, so providers in this area likely serve children from across the region.

Cost of Care

Even when families are able to find a spot in a licensed child care setting, the high cost of care is often a barrier. In the Roaring Fork and Colorado River Valleys, the median monthly tuition for full-time child care ranges from nearly \$1,200 for preschoolers in Garfield County to more than \$1,800 for toddlers and preschoolers in Pitkin County. Families with multiple children in child care could easily face child care costs that exceed \$3,000 per month.

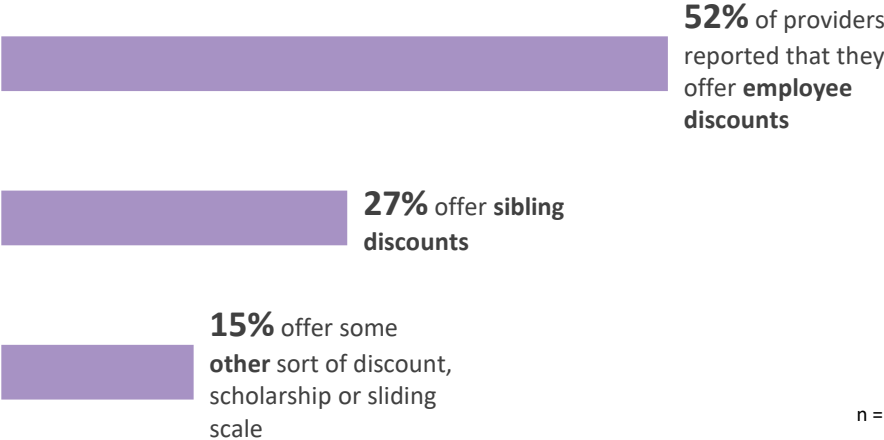
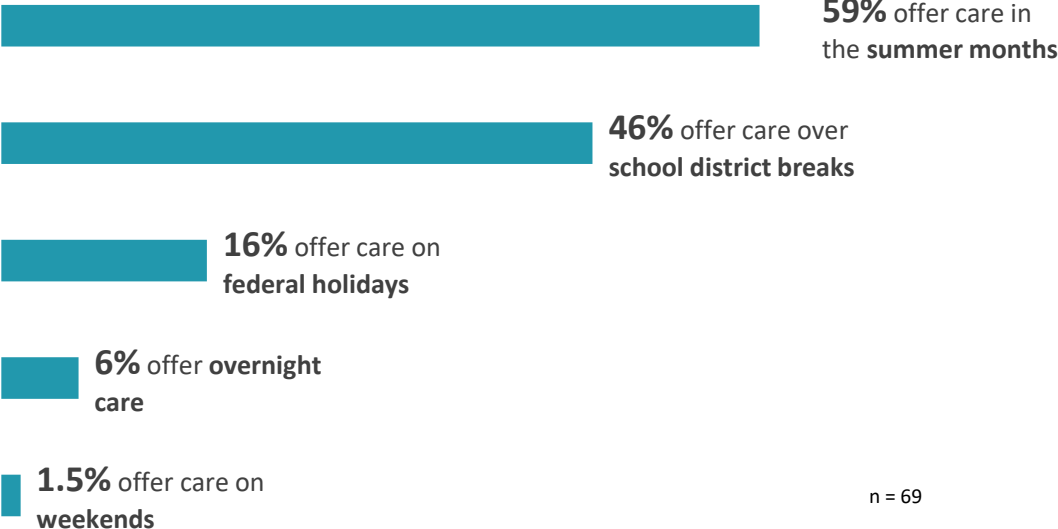
The federal government considers child care affordable when costs do not exceed 7% of a family’s income. The median cost of care for one preschool-aged child ranges from 15% of the median family income in Garfield County to nearly 18% of median family income in Pitkin County – more than double the affordability threshold.³

Median full-time monthly tuition ranges from nearly \$1,200 for preschoolers in Garfield County to more than \$1,800 for preschoolers in Pitkin County.

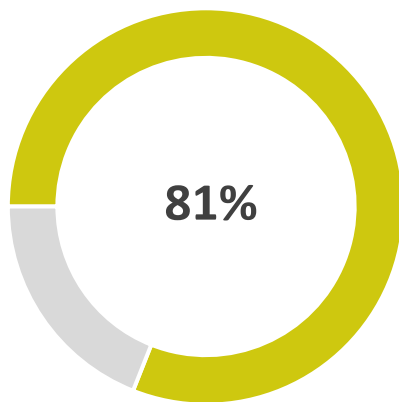
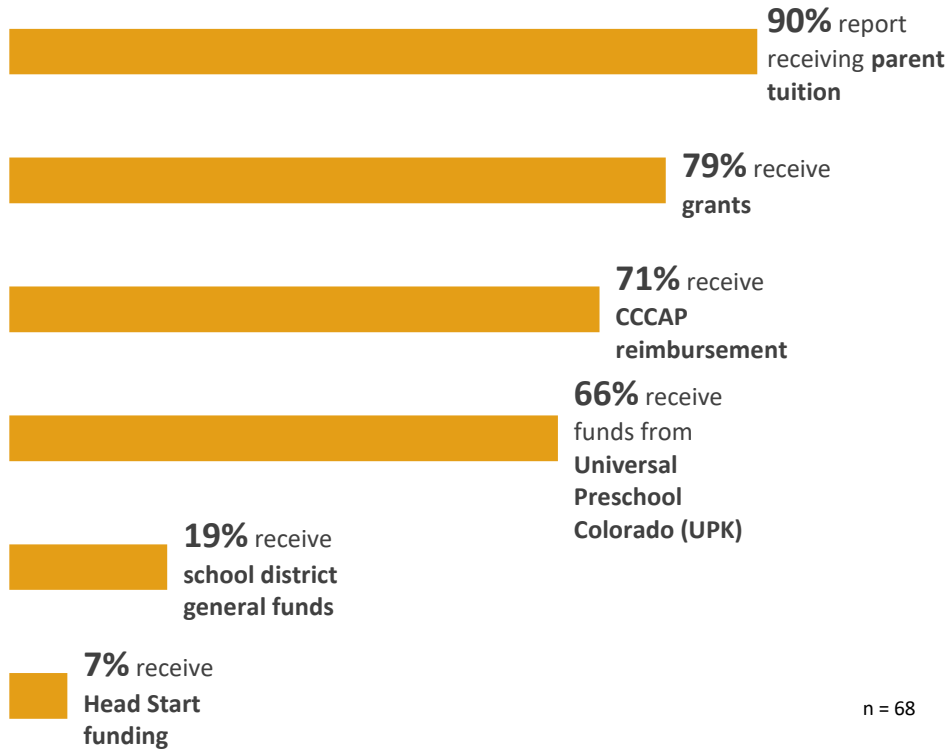


Provider Characteristics

Among Roaring Fork and Colorado River Valley providers surveyed...



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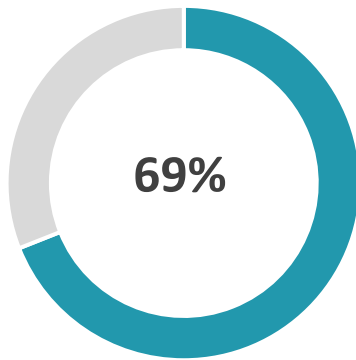


n = 72

of providers report they have a **fiscal agreement or contract with the Colorado Child Care Assistance Program (CCCAP)**. CCCAP helps families who meet income eligibility guidelines and who are working, searching for work, in school, or homeless afford child care.

In total, providers who have a fiscal agreement with CCCAP reported **servicing 160 children who receive CCCAP**. The **average number of children who receive CCCAP served** by providers who report having a fiscal agreement was **2.9**.

Among Roaring Fork and Colorado River Valley providers surveyed...

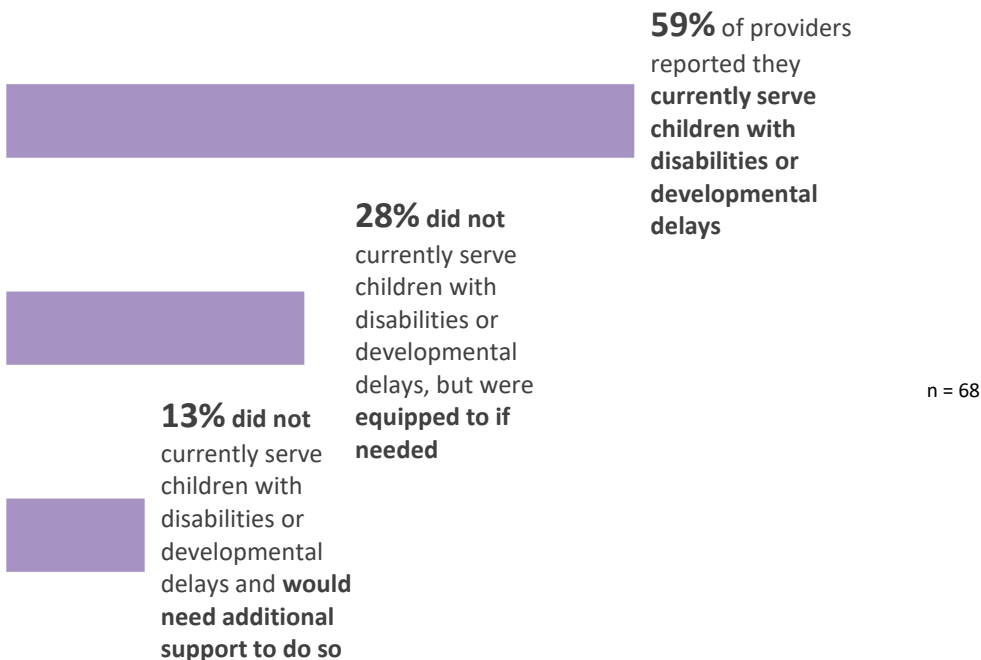


n = 68

report **participating in Universal Preschool Colorado (UPK)**. UPK provides 15 hours of free preschool for every Colorado 4-year-old in the year before kindergarten, which equates to about \$609 per month. The median cost of full-time preschool in the Roaring Fork and Colorado River Valleys was \$1,450, meaning families who participate in UPK still need to cover a significant portion of preschool expenses. Four-year-olds with certain risk factors qualify for 30 hours of free preschool, and 3-year-olds with risk factors can receive 10 hours of free preschool. The 2023-2024 school year was the first year of UPK in Colorado.

Data from the Rocky Mountain Early Childhood Council indicate that **748 4-year-olds** and **180 3-year-olds** in the region received preschool funding through UPK in the 2023-2024 school year. UPK is designed to increase affordability of preschool for children in the year before kindergarten and **does not address the acute shortage of early care and education opportunities for infants and toddlers.**

Ten providers reported **changing the number of children they serve as a result of UPK**. Only one provider reported serving fewer infants and toddlers due to the implementation of UPK. Multiple providers reported serving higher numbers of preschool-aged children, and a handful of providers reported opening new preschool classrooms.



Among Roaring Fork and Colorado River Valley providers surveyed...



100% report having staff who speak **English** to children



85% have staff who speak **Spanish** to children



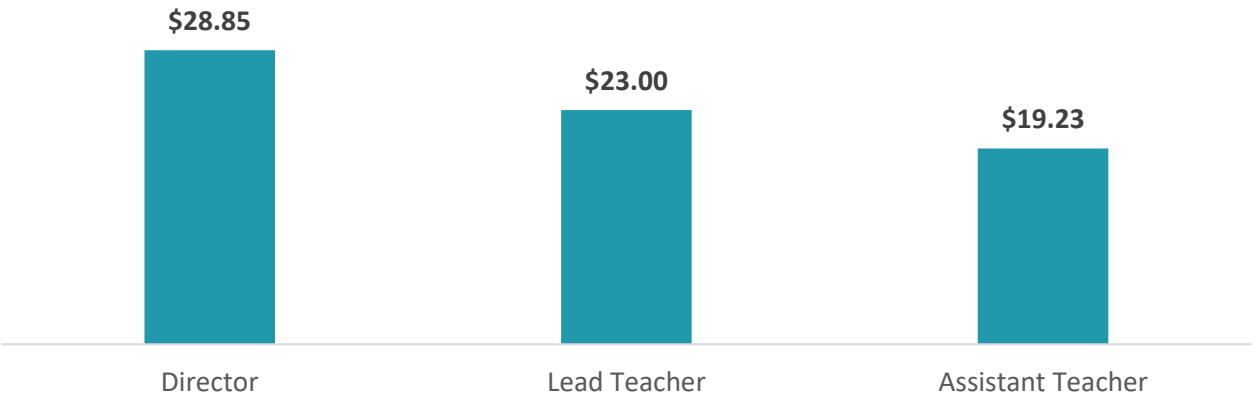
8% have staff who speak a **language other than English or Spanish** to children (French, German, Portuguese, Russian and Ukrainian)

n = 53. Asked only of child care centers, preschools and large family child care homes.

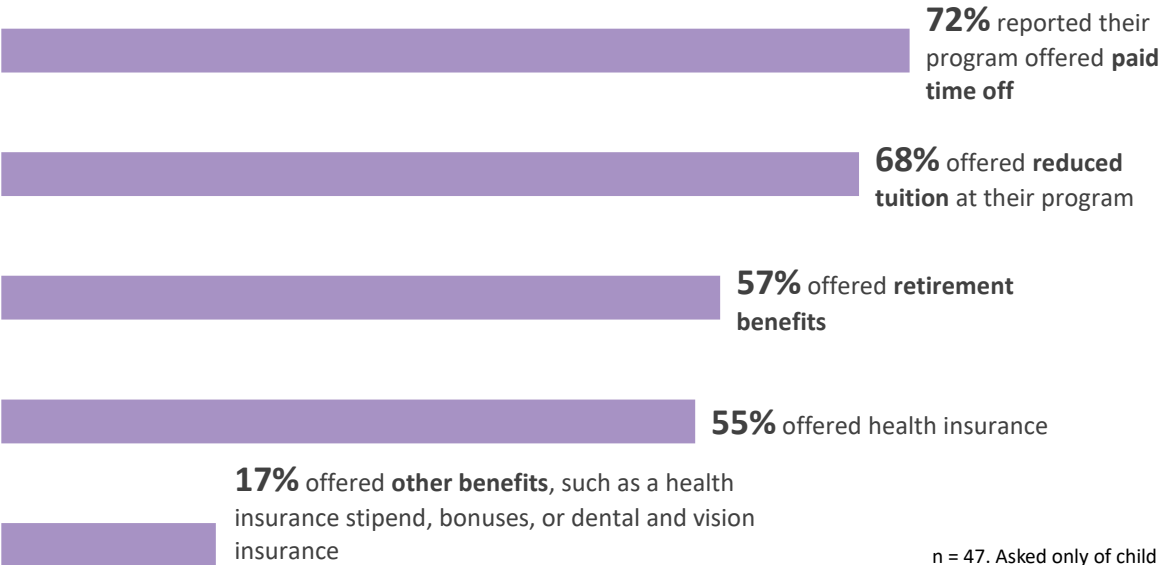
Provider Wages and Benefits

Wages for child care providers typically fall far below wages for other professions. In 2021, Colorado’s median wage for child care teachers was only about half the median wage for a kindergarten teacher.⁴ Many providers in the Roaring Fork and Colorado River Valleys cited insufficient wages and benefits as barriers to remaining in the early care and education field.

Median hourly wages for child care providers in child care centers, large family child care homes and preschools range from **\$19 per hour for assistant teachers** to approximately **\$29 per hour for directors**. Minimum wage in Colorado for 2023 was \$14.42.



Nearly three out of four programs reported offering staff paid time off, while only slightly more than half offered health insurance.



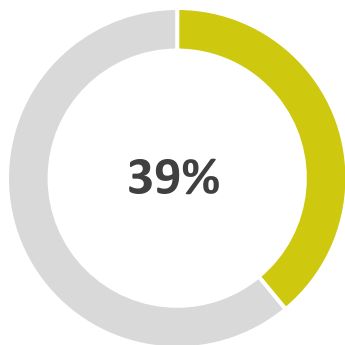
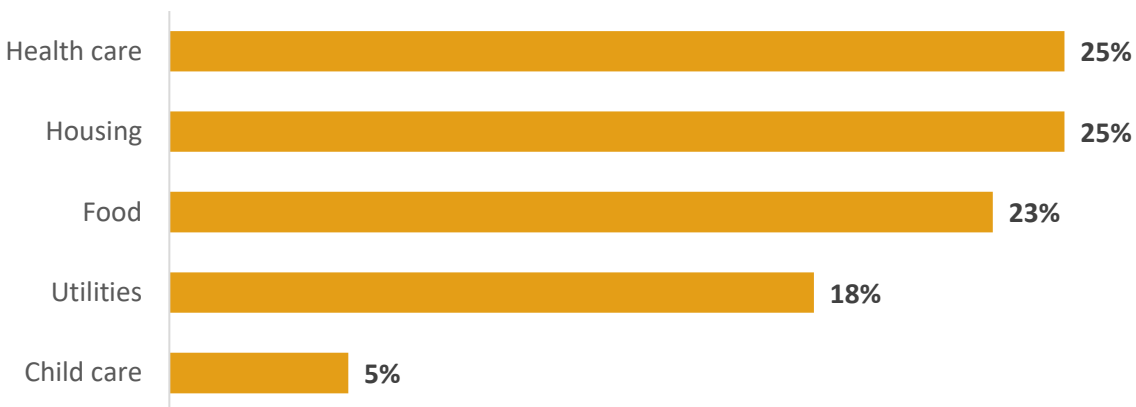
n = 47. Asked only of child care centers, preschools and large family child care homes.

Provider Experiences and Challenges

Many providers report that it is difficult to pay for their own basic needs.

1 in 6 providers reported it was **hard or very hard** for their household **to afford basic needs** in the previous month.

Health care and **housing** were most commonly reported as being hard to afford.



of providers reported that they have **considered leaving the field of early care and education** at some point. Burnout, exhaustion and low wages were commonly cited as reasons providers considered leaving.

“It’s fatiguing...and hard to earn enough money to support my family in this expensive place.”

“There is a lot of responsibility and stress, and the pay does not reflect that.”

When asked about the biggest barriers they faced to remaining in the early childhood field, providers said...

“Burning out, not making enough money to live. I already work two jobs.”

“Not being able to live where I work.”

“Long hours.”

“Salary and benefits.”

“Finding housing for our employees.”

“Being able to pay employees enough, while trying to keep child care affordable for families.”

“Staffing, pay and support.”

“I need benefits and more time off.”

“Need more staff, need higher pay for myself and my staff, need health benefits.”

“Lack of support for the professional field of early childhood educators. Low wages, low appreciation, lack of benefits.”

“Money and time.”

“Retaining staff.”

“It is a lonely profession with a lot of rules and very little money or acknowledgment.”

When asked **what would make them feel most valued** for their work, providers said...

“Community support.”

“Recognition for all the hard work and dedication. I have been in the field for 40 years. Appreciation and acknowledgment.”

“More time and pay for teachers.”

“Support, mentors, funds for continuing education, funds to upgrade equipment and replacements if needed, and funds to hire and train new employees as needed.”

“Deserved pay and benefits, similar to other educators. Recognition of the importance of ECE by the government.”

“Higher pay and flexibility in my position.”

“Being able to offer all staff a living wage and benefits that don’t cost the business too much. Also being considered educators and receiving the same benefits as a K-12 teacher would be great.”

“Appreciation of parents.”

“Seeing that children are happy.”

“Recognition of the importance of accessible child care for all families and valuing the ECE workforce.”

¹ Child and Adolescent Health Measurement Initiative. 2022 National Survey of Children’s Health (NSCH) data query. Data Resource Center for Child and Adolescent Health supported by the U.S. Department of Health and Human Services, Health Resources and Services Administration (HRSA), Maternal and Child Health Bureau (MCHB).

² U.S. Census Bureau, 2018-2022 American Community Survey 5-Year Estimates.

³ Median family income data from the U.S. Census Bureau, 2018-2022 American Community Survey 5-Year Estimates.

⁴ Colorado Department of Labor and Employment. Occupational Employment and Wage Statistics Program. Median annual wages for childcare workers, preschool teachers, kindergarten teachers and elementary teachers, 2021.