

Whatcom County Child Care Demand Study

Prepared by the Center for Economic and Business Research

Author:

Brianna Berkson

June 2021

Table of Contents

| | |
|---|----|
| About the Authors | 4 |
| Executive Summary | 5 |
| Research Questions | 5 |
| Demand Forecast..... | 6 |
| Parent/Guardian Survey | 7 |
| Discussion Groups..... | 8 |
| Further Research | 8 |
| Background on Child Care Expansion Planning | 9 |
| Forecasting Child Care Demand..... | 9 |
| COVID-19 Labor Force Changes and Recovery Assumptions | 10 |
| Population Growth Assumptions..... | 12 |
| Child Care Preference Assumptions | 12 |
| Child Care Location Assumptions | 13 |
| Demand Forecast..... | 14 |
| Current Supply and Gap Analysis..... | 15 |
| Survey Responses | 16 |
| Programs and Factors to Consider by Region | 16 |
| Programs and Factors to Consider by Income Level..... | 17 |
| Programs and Factors to Consider by Race/Ethnicity..... | 17 |
| Questions Asked of All Respondents | 17 |
| Respondents with Children 0-5 | 18 |
| Respondents Who Do Not Want Formal Child Care | 20 |
| Respondents Who Want Formal Child Care | 22 |
| Respondents with School-Age Children..... | 34 |
| Demographics..... | 36 |
| Discussion Group Feedback..... | 48 |
| Parent/Guardian Groups | 48 |
| Background Information..... | 49 |
| COVID Impacts on Routine | 49 |
| Changed Preferences Due to Pandemic | 49 |
| Child Care Utilization Decisions | 50 |

| | |
|---|----|
| Quality Metrics | 50 |
| Expected Child Care Activities | 51 |
| Ideal Provider..... | 52 |
| Outdoor Education | 52 |
| Biggest Challenges | 52 |
| Concluding Comments..... | 53 |
| Employer Group..... | 54 |
| Background Information..... | 54 |
| Current Child Care Support..... | 54 |
| Future Considerations for Child Care Support..... | 54 |
| Community Partners..... | 55 |
| Employee Experiences..... | 55 |
| Community Creativity..... | 55 |
| Public Policies | 55 |
| Suggestions for Company Support | 56 |
| Post-COVID | 56 |
| Concluding Remarks by Participants..... | 56 |

About the Authors

The Center for Economic and Business Research is an outreach center at Western Washington University located within the College of Business and Economics. In addition to publishing the Puget Sound Economic Forecaster, the Center connects the resources found throughout the University to assist for-profit, non-profit, government agencies, quasi-government entities, and tribal communities in gathering and analyzing useful data to respond to specific questions. We use a number of collaborative approaches to help inform our clients so that they are better able to hold policy discussions and craft decisions.

The Center employs students, staff, and faculty from across the University as well as outside resources to meet the individual needs of those we work with. Our work is based on academic approaches and rigor that not only provides a neutral analytical perspective but also provides applied learning opportunities. We focus on developing collaborative relationships with our clients and not simply delivering an end product.

The approaches we utilize are insightful, useful, and are all a part of the debate surrounding the topics we explore; however, none are absolutely fail-safe. Data, by nature, is challenged by how it is collected and how it is leveraged with other data sources. Following only one approach without deviation is ill-advised. We provide a variety of insights within our work – not only on the topic at hand but also the resources (data) that inform that topic.

We are always seeking opportunities to bring the strengths of Western Washington University to fruition within our region. If you have a need for analysis work or comments on this report, we encourage you to contact us at 360-650-3909 or by email at cebr@wwu.edu.

To learn more about CEBR visit us online at <https://cebr.wwu.edu> or follow us online through your favorite social media stream.



[facebook.com/westerncebr](https://www.facebook.com/westerncebr)



twitter.com/PugetSoundEF



[linkedin.com/company/wwu-center-for-economic-and-business-research](https://www.linkedin.com/company/wwu-center-for-economic-and-business-research)



[instagram.com/wwucebr](https://www.instagram.com/wwucebr)

The Center for Economic and Business Research is directed by Hart Hodges, Ph.D. and James McCafferty.

Executive Summary

The goal of this study is to provide the client (United Way of Whatcom County), policymakers, child care providers, child care credentialing programs, employers, community members, and other stakeholders with a better understanding of the demand for child care in Whatcom County. First, we surveyed households in Whatcom County with children age 0-5 to get feedback on how their children are currently cared for, what types of child care they want, and what they look for in child care. Using data gathered from this survey and other available literature and resources, we then constructed a forecast for child care demand in Whatcom County.

By identifying the types of care and specific factors that drive parent and caregiver choice as outlined in this report, child care leaders and providers can ensure that investments made in program expansion will be well-utilized and will meet the needs of parents and caregivers.

Research Questions

The report ahead will be organized in two parts – the demand forecast and methodology, followed by survey responses. For each section, we aim to answer a few key questions about the needs and preferences of Whatcom County families who are looking for child care.

By forecasting demand for formal child care (licensed center, licensed family home, or licensed school-age program), the report aims to address the following questions:

- How much child care availability is needed to meet demand?
- How might demand change if the COVID-19 pandemic has long-lasting impacts on women's labor force participation rate?
- How will child care demand be distributed across the county?

The survey represents a direct appeal to Whatcom County families with children age 0 to 5 to gather their feedback on a series of key questions:

- What share of the population is considering using formal child care?
- For those who do not plan to use formal child care, what motivated their decision?
- For families who are considering using formal child care, what type of care are they looking for in terms of:
 - Program type
 - Location
 - Hours per week
 - Other desired attributes
- What insights can demographic and geographic factors provide into child care demand?
- What factors are important for those open to enrolling their school-age child in formal child care?

Respondents with school-age children were asked a narrower set of questions regarding child care preferences and priorities.

Demand Forecast

Demand is forecasted in terms of full time equivalent (FTE) child care availability needed. Each full-time slot demanded corresponds to 1 FTE, while each part-time slot demanded corresponds to 0.67 FTE. We define formal child care as care in a licensed child care program, while informal care is provided by a family member, friend, babysitter, or equivalent. Child care demand for children less than 5 years old is considered under three different scenarios:

- **Current Utilization:** This scenario is based on current child care utilization patterns as reported in the survey, with 42% of respondents reporting that their children are enrolled in formal child care and 60% of that formal care being part-time.
- **Moderate Demand Coverage:** Takes the average of the low and high demand scenarios – 59% enrollment in formal child care with 55% opting for part-time care.
- **Total Demand:** Assumes all families who are considering formal child care (77%) enroll, with half in full time care and half in part-time (percentages are based on survey results).

By 2025, Whatcom County would need to increase their 0-5 child care capacity by 5,817 and their school-age capacity by 6,252 to meet the Total Demand scenario.

| Total FTE Child Care Demand | | | | | |
|---|-------|-------|-------|-------|-----------------|
| | 2022 | 2023 | 2024 | 2025 | Annual Increase |
| Total Demand (<5) | 8,387 | 8,425 | 8,463 | 8,501 | 38 |
| Moderate Demand Coverage (<5) | 6,351 | 6,380 | 6,409 | 6,437 | 29 |
| Current Utilization (<5) | 4,396 | 4,416 | 4,436 | 4,456 | 20 |
| School-Age Scenario (5-9) | 7,001 | 7,095 | 7,190 | 7,285 | 95 |

The following report will outline demand based on these factors in more detail:

- Labor force participation rate changes post-COVID
- Forecasted population growth
- Child care preferences expressed in the survey

Parent/Guardian Survey

The primary mode of data collection was a survey promoted to Whatcom County residents from February 22 to March 26 via two direct mail pieces (both pieces were sent in English and Spanish), targeted paid social media advertisements, and through multiple other stakeholders' own communication channels. The survey was available online as well as by phone, with interpretation available. These data collection methods were chosen because they promoted the survey to a wide audience and provided access to those who were unable to complete the survey online, thus reducing barriers and increasing the probability of acquiring a representative sample of the Whatcom County community.

Questions were organized to gather information on a variety of questions from three main groups:

- Families with children 0-5 who do not plan to enroll their children in formal child care
 - What factors were most significant in this decision?
- Families with children 0-5 who are open to enrolling their children in formal child care
 - What is their current child care usage?
 - What are they looking for post-pandemic?
 - What factors are most influential when looking for care?
 - Where in Whatcom County would they like child care?
- Families with children older than 5 who were open to using formal child care
 - What is most important when looking for child care for your school-age children?

Demographic questions were asked of all respondents along with questions to help establish the impact of the COVID-19 pandemic on Whatcom families. Overall, the sample obtained is demographically representative of Whatcom in terms of race, ethnicity, and income. The sample was also representative of the County in terms of geography, with the sample deviating from the population by +/- 1% in most school districts. Bellingham was overrepresented in the sample by 9 percentage points and Blaine was underrepresented by 4 percentage points. The most significant deviation, in terms of demographics, was that 83% of the sample were women.

Response rates vary by questions, but the overall survey gained 1,312 respondents who completed at least the first question and 835 with children between the age of 0 and 5 (653 considering formal care), and 716 respondents with school age children (364 considering formal care). Statistically speaking, this represents a +/- 3% margin of error at a 95% confidence level. The survey was offered in both English and Spanish, online or by phone. A total of 10 respondents completed the survey in Spanish.

For respondents that currently use or are considering formal child care, the attributes most likely to be a "significant factor" in choosing child care are: quality (98%), safety (97%), and a welcoming environment (90%). Half of these respondents also indicated that the child care they have now does not meet their needs, with commonly cited barriers being cost, availability, or struggles related to the COVID-19 pandemic.

Turning to respondents who do not desire or intend to enroll their child in formal child care, the factors most likely to be reported as "significant" reason for not wanting formal child care are: a preference to have their child cared for by a parent or guardian (71%), a preference for informal child care (58%), and safety concerns (50%).

Discussion Groups

After the survey was completed, a series of focus groups were run with survey respondents from BIPOC households, eastern Whatcom County, and northwestern Whatcom County to gather more information on their experiences as under-represented voices within the county. Through these discussions, we found:

- Availability and accessibility are major concerns
- There is a strong preference for individualized interactions between child care staff and children, as well as their parent/guardian
- Finding child care that matches work schedules that are not 9-5 can be a significant barrier
- Eastern and Northwestern Participants:
 - Child care options are limited outside of Bellingham
- Participants from BIPOC Households:
 - Were more likely to care about equity and diversity when looking for child care
- Recommendations:
 - Long Term:
 - Improve availability and affordability
 - Short Term:
 - A comprehensive website with licensed providers and general information for those looking for child care and subsidy information

In addition, a discussion group was held with Whatcom County employers. They highlighted the importance of community organizations to keep child care on their radar and pushing for more availability and affordability. The participants also suggested the possibility of employer-sponsored child care programs for large employers and collections of smaller employers.

Further Research

More research can be done to align and compare this data to local, state, and national trends in child care. While Whatcom County is unique in many ways, regional and national trends and legislation related to child care will be influential locally.

It may also be useful to develop a county-wide child care website with both general information and a comprehensive list of licensed providers. This will help reduce information barriers for those looking for child care.

Background on Child Care Expansion Planning

Whatcom County has been characterized as a child care desert due to the well-documented gap between child care supply and demand. One 2019 report from Child Care Aware estimates the child care shortage at 4,462 slots.¹ The goal of this demand forecast is to help inform the Whatcom Child Care Coalition’s expansion plan and strategic recommendations for Whatcom County. The Whatcom Child Care Coalition’s expansion plan aims to offer recommendations that will set the County on a path to²:

- Increase the number of child care slots available
- Reduce the amount of time families spend on child care waitlists
- Ensure that household budgets can comfortably afford child care
- Increase the availability of on-site behavior supports in child care programs
- Provide equitable access to child care in both rural and urban areas

Forecasting Child Care Demand

In the next few pages, we discuss the process for modeling child care demand in Whatcom County and the key assumptions that were made. Overall, the forecast suggests that Whatcom County will likely need formal child care capacity for an FTE of 8,387 children under 5 (5,009 full time slots and 5,009 part-time slots) in 2022 with an increase of 38 FTE annually through 2025 in order to meet the total demand in Whatcom County. For school-age children (age 5-9), the projected 2022 total demand is 4,174 FTE increasing annually by 56 FTE up to 2025.

Comparing 2021 supply to forecasted 2025 demand, we see a gap of 5,817 FTE formal child care slots for children 0-5 and a gap of 6,252 FTE for school-age care. The total annual growth rate of child care demand during this period is forecasted to be 0.8%, which is in keeping with JobsEQ’s 0.8% forecasted growth rate for child care employment.³

How to Use the Forecast

The demand forecast is largely based on survey data and the share of respondents who indicated an interest in formal child care. While the promotion of the survey was aimed at all Whatcom County families with children less than 5, it is likely that families who are not interested in formal child care were less inclined to participate – thus the sample may overestimate the share of families who want formal child care. Three scenarios are modeled to provide a range of possibilities for child care demand and a better picture of how changes to the model’s assumptions impact the forecast.

¹ Child Care Aware. “Child Care Supply, Demand, and Cost in Whatcom County.” *Child Care Aware*, 18 October 2019, <https://www.ccanorthwest.org/wp-content/uploads/2019/11/WhatcomCountyReport2019.pdf>

² Whatcom Child Care Coalition. “Child Care and Early Learning for Every Family.” *United Way of Whatcom County*, November 2020, <https://www.unitedwaywhatcom.org/couch/uploads/file/wccc-child-care-brief.pdf>

³ JobsEQ. “Occupation Report: Childcare Workers in Whatcom County, Washington.” Accessed April 19, 2021.

A demand forecast is also provided by region; however, smaller sample sizes result in larger margins of error. Further study is recommended to better understand child care demand in less-populous regions of Whatcom County.

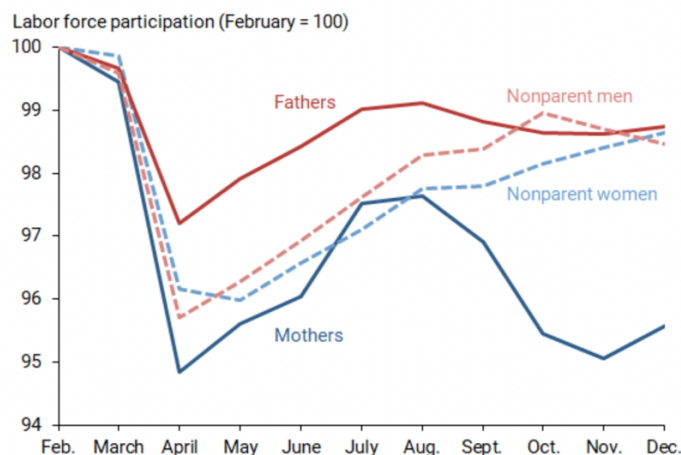
| | Bellingham | Blaine | Ferndale | Lynden | Meridian | Mt Baker | Nooksack |
|---|------------|--------|----------|--------|----------|----------|----------|
| Percent of Whatcom Population | 53% | 9% | 14% | 8% | 5% | 7% | 4% |
| Adjusted Percent of Whatcom Demand | 63% | 6% | 11% | 8% | 5% | 5% | 2% |

COVID-19 Labor Force Changes and Recovery Assumptions

One of the first major considerations for the forecast is the impact of the COVID-19 pandemic on Whatcom families and their child care usage, as well as how these factors are expected to change in the coming years. Based on national data and survey data, women have left the workforce at a much higher rate during the pandemic and have taken on a disproportionate amount of child care and household duties. However, the survey data shows that more female respondents were planning to be in the labor force post-pandemic than were currently working. This suggests an increased need for child care in the next year compared to current levels.

Below is a graphic from the Federal Reserve Bank of San Francisco illustrating the impact of the pandemic on labor force participation by gender and parent status. The labor force participation rate refers to the percentage of adults who are currently working or actively looking for work. Not only did pandemic-related layoffs hit traditionally female-dominated fields harder, school and child care closures led to more responsibilities shifting to mothers (in heterosexual, two-parent households). The second large decline in labor force participation for mothers corresponds to the beginning of the school year, again suggesting that these additional child care responsibilities forced many mothers to stay home and leave the labor force.

Evolution in labor force participation during the pandemic



Source: Lofton, Olivia, Nicolas Petrosky-Nadeau, and Lily Seitelman. "Parental Participation in a Pandemic Labor Market." *Federal Reserve Bank of San Francisco*, 5 April 2021, https://www.frbsf.org/economic-research/publications/economic-letter/2021/april/parental-participation-in-pandemic-labor-market/?utm_source=mailchimp&utm_medium=email&utm_campaign=economic-letter

As the pandemic slows and more schools and child care options open, how will labor force participation change for mothers? Will they return to the labor force and need the same child care they had pre-pandemic, or will their child care needs change?

In our survey of Whatcom parents/guardians, we asked respondents about their current employment, schooling, or other responsibilities. The following table summarizes the feedback received from female survey respondents on their current and expected post-pandemic labor force participation. Census data from 2019 on pre-pandemic labor force participation are also included; however, they come with large margins of error.

| Women’s Labor Force Expectations | Pre-Covid (2019 Census Data) ⁴ | Current % | Post-COVID % | % Change |
|---|---|---------------|---------------|-----------|
| In School: primarily in person classes | | 0.5% | 1.0% | 100% |
| In School: primarily online classes | | 1.0% | 0.5% | -50% |
| Unemployed | 1.6% (women with children <18) 2.8% (women with children <6) | 1.8% | 0.6% | -67% |
| Other responsibilities (please explain): | | 5.8% | 4.3% | -25% |
| A mix of working/schooling from home and from another location | | 11.1% | 13.0% | 17% |
| Stay-at-home parent/caregiver | | 14.6% | 10.3% | -30% |
| Employed: working from home | | 27.6% | 9.5% | -66% |
| Employed: not working from home | | 37.8% | 60.8% | 61% |
| Total | | 100.0% | 100.0% | |
| In Labor Force | 72% (women with children <18) 65% (women with children <6) | 65.3% | 70.3% | 7% |

Currently, 65% of respondents have employment as their primary time commitment; however, 70% of respondents expect employment to be their primary time commitment after the pandemic. This suggests that many Whatcom mothers who may have left the labor force as a result of the COVID-19 pandemic plan to rejoin the labor force post-pandemic and some who may not have been in the labor force before the pandemic plan to join in the next year. This data is used to inform the scenarios presented in the “Child Care Preference Assumptions” section of this report.

⁴ Census Bureau. “Median Household Income by Household Size.” *Census Bureau*, 2019, <https://data.census.gov/cedsci/table?q=ACSDT1Y2019.B19019&g=0500000U53073&tid=ACSDT1Y2019.B19019&hidePreview=true>

Population Growth Assumptions

Another important factor in forecasting child care demand is forecasting populations. The following table presents population projections from Washington State’s Office of Financial Management (OFM) for relevant age groups in 2020 and 2025.⁵ For the purpose of modeling child care demand, we assume that the population follows a straight-line growth rate between 2020 and 2025.

We rely on data from OFM in this instance because it is used by city and county governments as the basis for decisions related to their comprehensive plans.

| Age | 2020 | 2025 | Annual Increase |
|--------|--------|--------|-----------------|
| 0 to 4 | 12,965 | 13,261 | 59 |
| 5 to 9 | 13,281 | 14,191 | 182 |

Source: WA Office of Financial Management. “County Projections: 2010-2050 by Age and Sex (Medium Series Only).” 2017, <https://ofm.wa.gov/washington-data-research/population-demographics/population-forecasts-and-projections/growth-management-act-county-projections/growth-management-act-population-projections-counties-2010-2040-0>

Child Care Preference Assumptions

The next question to consider is what percentage of children will be enrolled in formal child care, as opposed to solely using informal child care or parent/guardian care. For this, we turn to survey data to create three potential scenarios:

- **Current Utilization:** We base this scenario on current child care utilization rates as reported though the survey. The full time vs. part time care distributions are determined using survey data on current usage.
- **Total Demand:** This scenario assumes that all respondents who are open to enrolling their child in formal child care (77%) do. Formal child care is divided between the three categories following the relative distribution established in the low demand scenario. The distribution between full time and part time care is based on survey respondents reporting the type of care that would best meet their needs.
- **Moderate Demand Coverage:** Here we take the average of the low and high demand scenarios to establish a “most likely” scenario where more families use child care than during the COVID-19 pandemic; however, some families who are open to formal child care may opt for informal child care, face barriers to using formal child care, or have a parent who has remained out of the labor force. The scenario also uses the average FTE of the Low and High Demand scenarios.

For school-age children, we default to the survey data, which suggests that 52% of families with school-age children are considering enrolling them in formal child care. Given that these children (post-pandemic) are in school, we assume that all of their demand for child care will be part-time during the school year and potentially full-time during the summer. Given that part-time slots will likely overlap

⁵ WA Office of Financial Management. “Population by Age and Sex, Five Year Age Groups.” *Office of Financial Management, 2017*, <https://ofm.wa.gov/washington-data-research/population-demographics/population-forecasts-and-projections/growth-management-act-county-projections/growth-management-act-population-projections-counties-2010-2040-0>

completely, as will full-time slots, we assume the number of school-age children wanting child care will be equivalent to the licensed capacity needed.

| | Total Demand | Moderate Demand Coverage | Current Utilization |
|----------------------------------|--------------|--------------------------|---------------------|
| Formal Center-Based | 46% | 35% | 25% |
| Formal Home-Based | 5% | 4% | 3% |
| Preschool | 26% | 20% | 14% |
| Total Formal Care | 77% | 59% | 42% |
| Informal Care (no formal) | 12% | 30% | 47% |
| Only Parent/Guardian Care | 11% | 11% | 11% |

| | Total Demand | Moderate Demand Coverage | Current Utilization |
|------------------|--------------|--------------------------|---------------------|
| Full Time | 50% | 45% | 40% |
| Part Time | 50% | 55% | 60% |
| FTE | 75% | 73% | 70% |

Child Care Location Assumptions

Lastly, we use survey data to forecast the share of total demand that is expected to fall within each region of Whatcom County. To maintain as much statistical significance as possible, the county is divided into three regions by school district:

- **Bellingham:** Bellingham School District
- **East:** Mt. Baker and Nooksack school districts
- **Northwest:** Blaine, Ferndale, Lynden, and Meridian school districts, as well as the Lummi Nation

The first table displays the percentage of each region’s residents want child care in each region. For instance, 19% of Northwest Whatcom respondents who are open to formal child care indicate that their ideal location for child care is in Bellingham. This is likely an illustration of where people work compared to where they live. Bolded numbers represent the percentage of each region’s residents who are looking for child care in their home region.

| Where Survey Respondents Live and Where They Want Child Care | | | | |
|--|------------|------------------------|-------------|-------------|
| | | Where Respondents Live | | |
| | | Bellingham | East | Northwest |
| Ideal Child Care Location | Bellingham | 98% | 42% | 19% |
| | East | 1% | 36% | 6% |
| | Northwest | 1% | 21% | 75% |
| | Total | 100% | 100% | 100% |

Next, we use the Whatcom population distribution and data in the table above to create an estimate for the distribution of child care demand across Whatcom County. Based on survey responses and our associated assumptions, we expect roughly 63% of child care demand to be in the Bellingham region, 30% to be in Northwest Whatcom County, and 7% to be in East Whatcom County.

| | Bellingham | East | Northwest | Total |
|---|------------|------|-----------|-------------|
| Percent of Whatcom Population | 53% | 11% | 36% | 100% |
| Adjusted Percent of Whatcom Demand | 63% | 7% | 30% | 100% |

The same process is applied below by school district. By breaking down the 399 respondents who provided both their home location and ideal child care location into 7 school districts; however, these estimates come with a large margin of error. As a result, the forecast will be presented by region rather than by school district in order to preserve more statistical significance.

| | Bellingham | Blaine | Ferndale | Lynden | Meridian | Mt Baker | Nooksack |
|---|------------|--------|----------|--------|----------|----------|----------|
| Percent of Whatcom Population | 53% | 9% | 14% | 8% | 5% | 7% | 4% |
| Adjusted Percent of Whatcom Demand | 63% | 6% | 11% | 8% | 5% | 5% | 2% |

Demand Forecast

Demand is forecasted by multiplying the total population for an age range by the percentage assumed to enroll in formal child care. The resulting figure is then multiplied by the associated FTE percentage to convert all demand to like terms. Finally, we break total FTE demand for each year into demand by geographic region. The resulting demand forecast is presented in the table below.

The Current Utilization and Total Demand scenarios should be viewed as the upper and lower limits on demand, while the Moderate Demand Coverage scenario accounts for the possibility that those considering formal care were overrepresented in the sample and that not all who are considering formal care will choose it when presented with the option.

| FTE Formal Child Care Demand by Region | | | | | | | | | | | | | | | | |
|---|------|------|------|-------|------|------|------|-------|------|------|------|-------|------|------|------|-------|
| | 2022 | | | | 2023 | | | | 2024 | | | | 2025 | | | |
| | Bell | East | NW | Total | Bell | East | NW | Total | Bell | East | NW | Total | Bell | East | NW | Total |
| Total Demand (<5) | 5320 | 565 | 2503 | 8387 | 5344 | 567 | 2514 | 8425 | 5368 | 570 | 2525 | 8463 | 5392 | 572 | 2537 | 8501 |
| Moderate Demand Coverage (<5) | 4028 | 428 | 1895 | 6351 | 4047 | 429 | 1904 | 6380 | 4065 | 431 | 1912 | 6409 | 4083 | 433 | 1921 | 6437 |
| Current Utilization (<5) | 2788 | 296 | 1312 | 4396 | 2801 | 297 | 1318 | 4416 | 2814 | 299 | 1324 | 4436 | 2826 | 300 | 1330 | 4456 |
| School-Age (5-9) | 4440 | 471 | 2089 | 7001 | 4500 | 478 | 2117 | 7095 | 4560 | 484 | 2146 | 7190 | 4621 | 490 | 2174 | 7285 |

Current Supply and Gap Analysis

Data on the supply of child care in Whatcom County was provided by the Washington State Department of Children Youth and Families (DCYF). The total licensed capacity can be compared to forecasted FTE child care demand.

| Whatcom County Child Care Supply | | | | | | | | |
|--------------------------------------|------------|-----------|----------|-----------|-----------|-----------|---------------|-----------|
| | Bellingham | | East | | Northwest | | Whatcom Total | |
| | Capacity | Providers | Capacity | Providers | Capacity | Providers | Capacity | Providers |
| Child Care Center | 1,746 | 35 | 72 | 2 | 512 | 12 | 2,330 | 49 |
| Family Child Care Home | 127 | 13 | 51 | 5 | 176 | 17 | 354 | 35 |
| School-Age Program | 835 | 21 | 68 | 3 | 130 | 5 | 1,033 | 29 |
| Other (Outdoor Preschool) | | | 16 | 1 | | | 16 | 1 |
| Total | 2,708 | 69 | 207 | 11 | 818 | 34 | 3,733 | 114 |

The gap between the supply of formal child care in 2021 and the forecasted Total Demand for 2025 is 12,068 FTE. There is a slight oversupply of formal home-based care in the East and Northwest regions; however, this may be a result of a lack of access to center-based care leading to more families turning to their secondary preference. As more center-based and preschool options become available, the oversupply of home-based care may become more evident.

| Estimated Increase in Supply Needed to Meet 2025 Total Demand Scenario | | | | |
|--|------------|------|-----------|---------------|
| | Bellingham | East | Northwest | Whatcom Total |
| Formal Center-Based Care and Preschools | 3,296 | 463 | 1,860 | 5,619 |
| Formal Home-Based Care | 223 | -14 | -11 | 198 |
| School-Age Care | 3,786 | 422 | 2,044 | 6,252 |
| Total | 7,304 | 872 | 3,892 | 12,068 |

Survey Responses

For this study, we divide child care into the following categories:

- **Formal Child Care:** requires payment (or accepts State subsidies), run as a business, usually licensed through the State
 - Center-Based: licensed child care usually located in commercial areas and care for a large number of children
 - Home-Based: licensed child care located in a home
- **Informal Child Care:** children are cared for by a nanny, babysitter, family member, neighbor, friend, etc.

Demographic cross tabs are provided by geography – East County (Mount Baker and Nooksack school districts), Bellingham, and North County (Blaine, Ferndale, Lynden, and Meridian school districts) – income, and race/ethnicity.

For income-based cross tabs, respondents are divided into those with household incomes below \$50,000 and those with incomes above \$50,000. The results of income cross tabs will be reported when responses between groups differ by at least 5 percentage points.

For race/ethnicity, the comparison groups will be respondents with at least one BIPOC person in their household and respondents with only White people in their household. Cross tab results are reported when responses between the groups differ by at least 10 percentage points, due to the smaller sample size for BIPOC respondents.

The survey question asking respondents where they live gathered 450 responses from individuals with children they would consider enrolling in formal child care. As a result, only questions shown to respondents wanting formal child care will be analyzed by region. Because of the small total sample size for these questions, and even smaller sample size when divided by region, we will only report differences of more than 10 percentage points in response rates by region.

Programs and Factors to Consider by Region

Overall, quality, safety, and a welcoming environment are the three most important factors for Whatcom respondents when looking for child care. Below is a summary of notable differences in child care preferences by region:

- Northwest Whatcom: Less interest in licensed centers, preschools, and parent/guardian care compared to the rest of the County. Lower preference for informal care and higher preference for licensed family homes compared to Bellingham respondents. Availability is more of a barrier than for East Whatcom respondents.
- East Whatcom: Lower part-time demand than respondents from other parts of the County and higher year-round demand than Northwest Whatcom respondents.

Programs and Factors to Consider by Income Level

Respondents with household incomes below \$50,000 were more likely to prefer formal child care, while those with higher incomes were more likely to prefer informal or parent/guardian care. Financial barriers were more common for respondents with incomes below \$50,000 and those with higher incomes were more likely to report that the child care they have now meets their needs. While all factors were more significant for respondents with incomes less than \$50,000, the largest gaps between groups were subsidy availability, cost, languages spoken, and sibling discount availability. There were no significant differences in the quantity of child care desired.

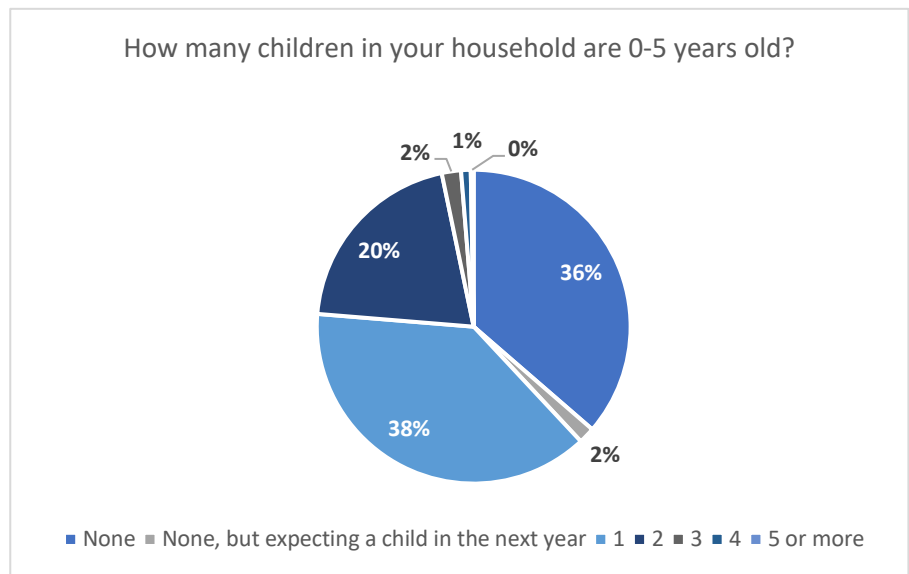
Programs and Factors to Consider by Race/Ethnicity

For respondents in BIPOC households who are not considering formal child care, five factors were more significant than for respondents in White households: staff diversity, a reduced need for formal care, a preference for informal care, the level of staff training, and the quality of care available. However, costs being too high was less likely to be a significant factor. BIPOC respondents who were currently using or considering formal child care were more likely to prioritize staff skill working with racially diverse classrooms and programs that accept state subsidies.

Questions Asked of All Respondents

Q1: How many children in your household are 0-5 years old? (n=1,312)

Of the 1,312 individuals who responded to the survey, 835 currently had children under 5 years old or expected to in the coming year. The other 477 did not have young children and were directed to Q18. Respondents with incomes less than \$50,000 were 6 percentage points less likely to mark “None.” There were no significant differences by race.



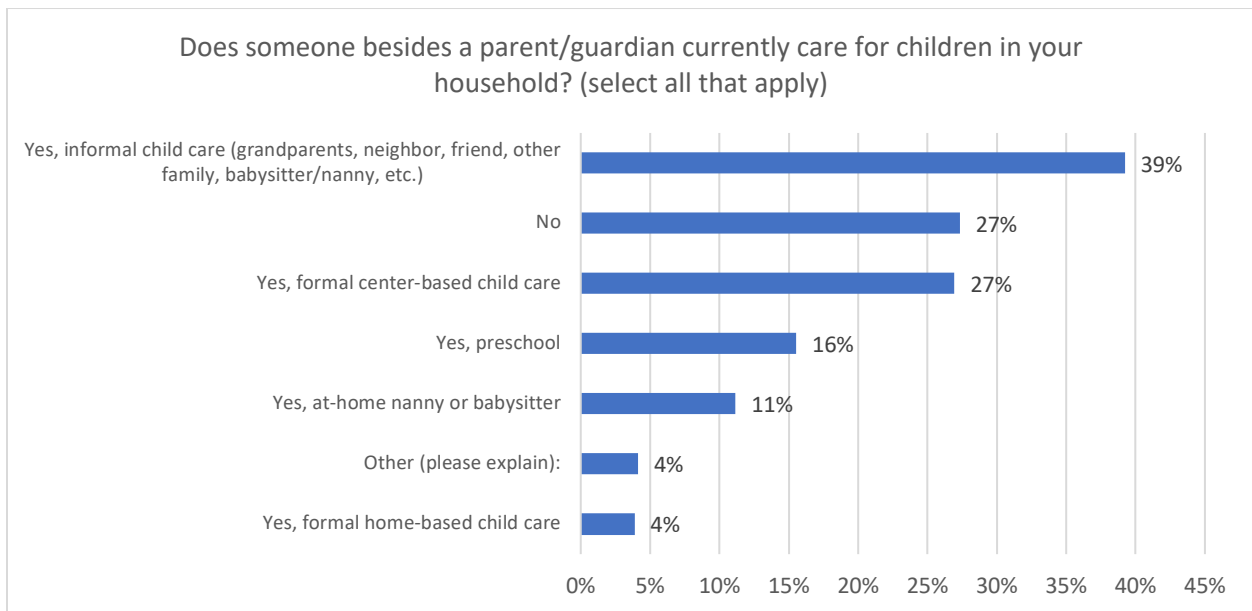
Respondents with Children 0-5

The following four questions were only asked of those with children age 0-5.

Q2: Does someone besides a parent/guardian currently care for children in your household? (select all that apply) (n = 798)

In this question, we begin to see what the demand for child care looks like among those with children 0 to 5 years old. Based on this data, we see that 27% of respondents use formal center-based child care, 4% use formal home based child care, and 27% have their children fully cared for by a parent/guardian.

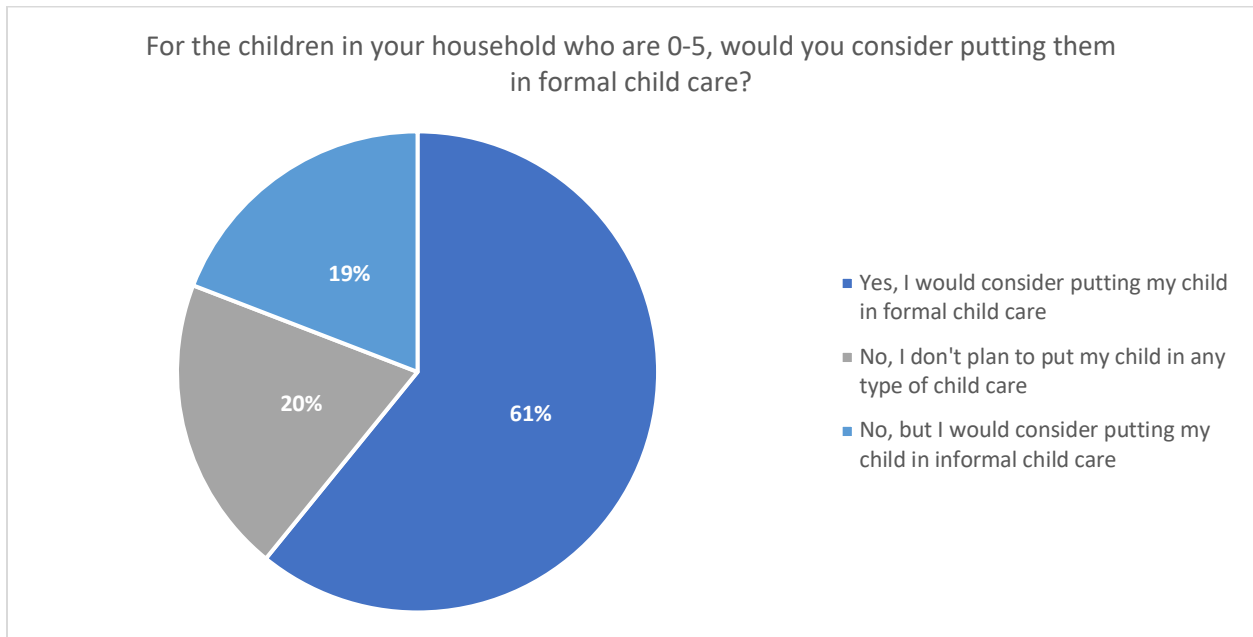
Respondents with incomes less than \$50,000 were less likely to have their child enrolled in preschool or to have them cared for by an at-home nanny or babysitter, but more likely to indicate that their child was only being cared for by a parent/guardian. BIPOC respondents were more likely to have formal center-based care.



| Other (please explain): | |
|------------------------------------|------------------------------|
| • COVID-19 Impacts (9 respondents) | • Informal (4 respondents) |
| • Kindergarten (9 respondents) | • School-Age (3 respondents) |
| • Parent Care (5 respondents) | • Respite Care (1) |

Q3: For the children in your household who are 0-5, would you consider putting them in formal child care? (n=465)

This question was only asked of respondents who did not select formal center, home, or preschool care in the previous question. Of those who are not currently using formal care, 61% are open to formal care in the future, 20% plan to have their child fully cared for by a parent/guardian, and 19% may rely on informal care. Respondents with incomes less than \$50,000 were more likely to consider informal care and less likely to be open to formal child care. There were no significant differences by race.



The following two questions were asked of those who do not currently have a child 0-5, but expect to in the coming year. Given the small samples, this data is not useful.

Q4: Has your child been in formal child care outside of your home in the past two years? (n=5)

Q5: Do you plan to have your child in formal child care in the next year? (n=5)

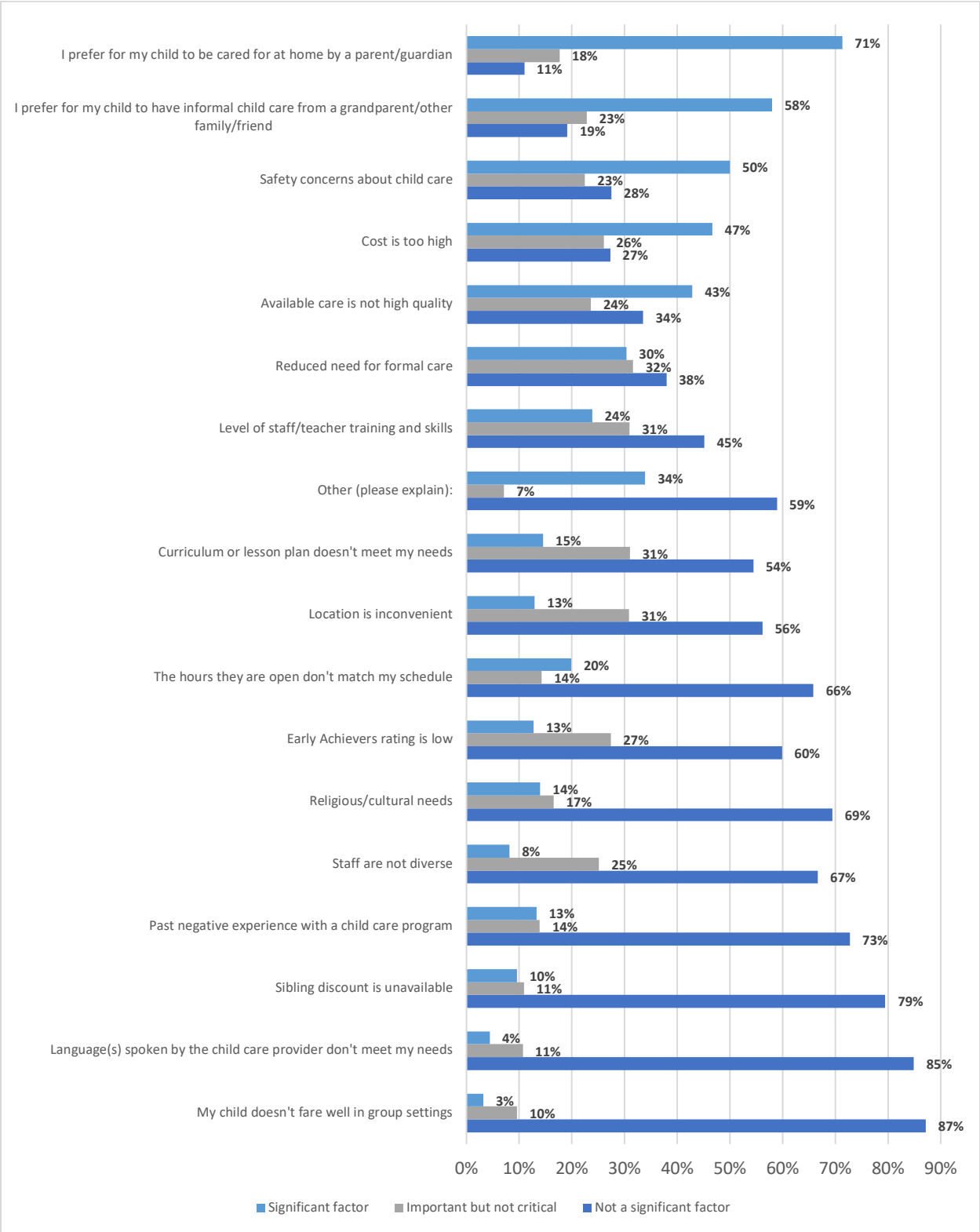
Respondents Who Do Not Want Formal Child Care

Q6: You indicated that you are not planning to place your child in formal child care in the year ahead. We are interested in learning what reasons may have led you to this decision. In looking at the list below, please tell us how much each factors may have influenced your decision (n=165)

This question was shown to respondents who are considering formal child care. Looking at the data, preferences for parent/guardian care or informal care are the most significant reasons why these respondents are not considering formal child care. Safety, cost, and quality also appear to be significant for this group.

The following table shows the percentage point difference between the responses of different demographic groups. Among the factors with the largest difference between income groups were cost, location, sibling discount availability, and quality. The largest differences between the responses of BIPOC and White respondents were with respect to the following factors: staff diversity, reduced need for formal care, a preference for parent/guardian care, quality, and teacher/staff training.

| Differences in % Rating Factor "Significant" | | |
|--|---------------|-----------------------|
| | BIPOC White | <\$50,000 >\$50,000 |
| Cost is too high | -11% | 30% |
| Location is inconvenient | - | 14% |
| Available care is not high quality | 10% | 12% |
| Early Achievers rating is low | - | 10% |
| Staff are not diverse | 15% | - |
| Sibling discount is unavailable | - | 13% |
| Religious/cultural needs | - | -5% |
| Past negative experience with a child care program | - | 9% |
| My child doesn't fare well in group settings | - | 10% |
| I prefer for my child to be cared for at home by a parent/guardian | - | -7% |
| I prefer for my child to have informal child care from a grandparent/other family/friend | 11% | - |
| Reduced need for formal care | 12% | 7% |
| Level of staff/teacher training and skills | 10% | - |



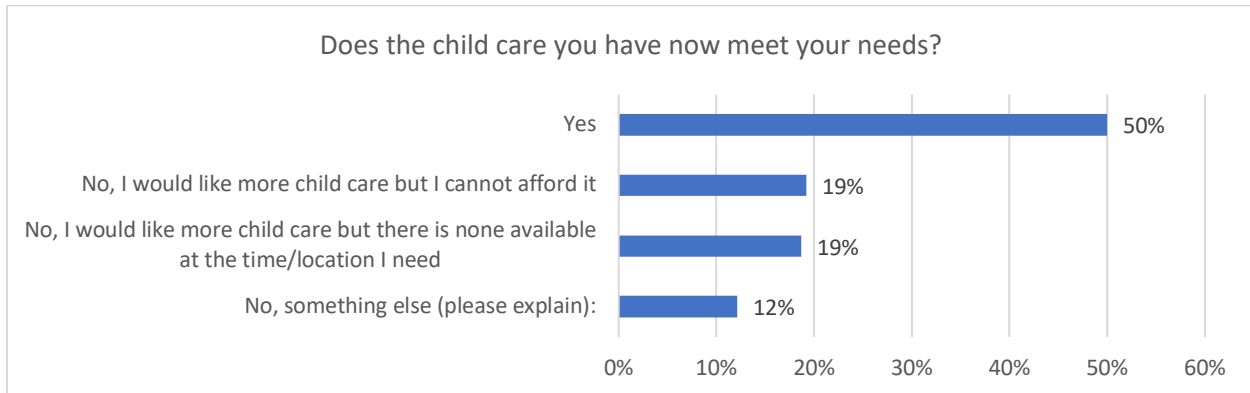
Respondents Who Want Formal Child Care

The following series of questions were only shown to those with children 0-5 who are currently in formal child care or who would consider formal child care in the future.

Q7: Does the child care you have now meet your needs? (n=578)

For those who are open to or currently use formal child care, half of the families report that their child care needs are not being met. Cost and availability were each barriers for 19% of respondents and those who responded *No, something else* mentioned pandemic-related struggles and combinations of cost and availability.

For those with incomes less than \$50,000, they were 21 percentage points more likely to say affordability is a barrier and 16 percentage points less likely to say that their needs are being met. By region, Northwest respondents were 11 percentage points less likely to choose *No, something else* compared to Bellingham respondents. Northwest respondents were also 12 percentage points more likely to indicate that availability was a barrier compared to East respondents. There were no significant differences by race.

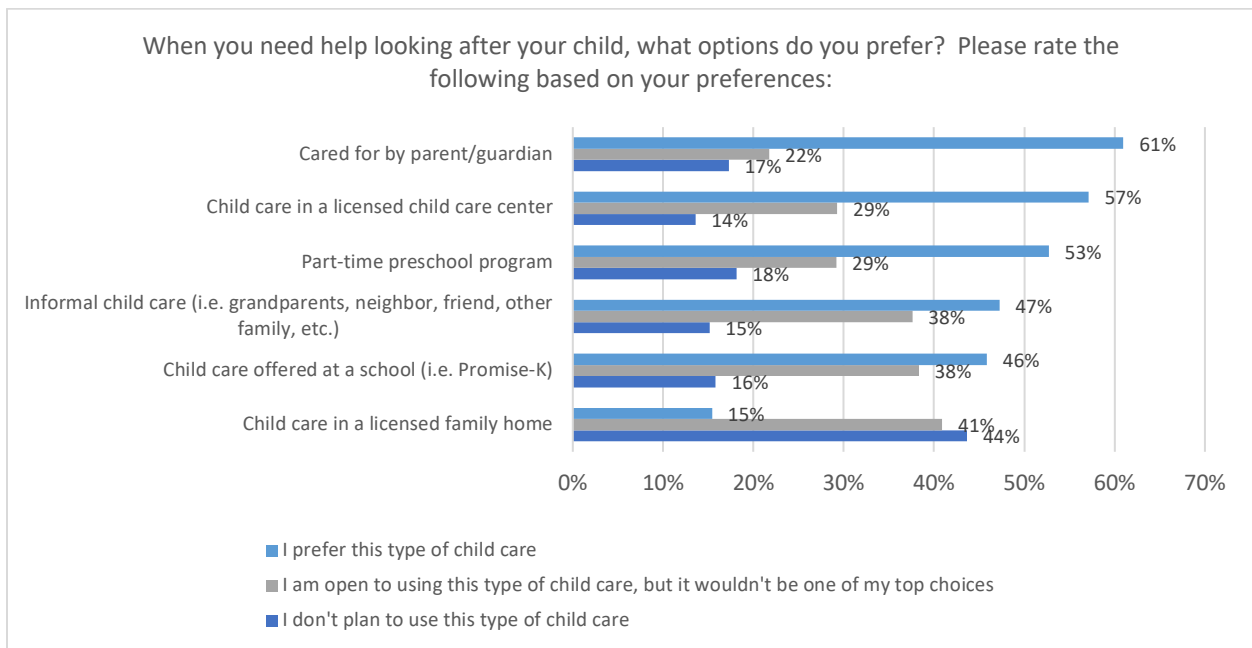


| | <\$50,000 >\$50,000 | NW Bellingham | NW E |
|---|-----------------------|-----------------|--------|
| Yes | -16% | - | - |
| No, I would like more child care but I cannot afford it | 21% | - | - |
| No, I would like more child care but there is none available at the time/location I need | - | - | 12% |
| No, something else (please explain): | - | -10% | - |

Q8: When you need help looking after your child, what options do you prefer? Please rate the following based on your preferences: (n=567)

The majority of respondents prefer care by a parent/guardian (61%), followed by licensed child care centers (57%), and part-time preschool (53%). Informal care (47%) and Promise-K (46%) were also preferred by a large share of respondents. Child care offered at a licensed family home, on the other hand, was only preferred by 15% and 44% do not plan to use this type of child care.

Respondents with incomes less than \$50,000 were more likely than respondents with higher household incomes to indicate that they prefer each type of child care, with the exception of informal child care and care by a parent/guardian. By geography, Northwest residents were 12 to 29 percentage points less likely than both Bellingham and East residents to indicate that they prefer care by a parent/guardian, through a licensed center, or through a part-time preschool program. Bellingham respondents were more likely to indicate that they prefer informal child care (10 percentage points) and less likely to prefer care in a licensed family home (11 percentage points) compared to Northwest respondents. There are no significant differences by race. Single parent/guardian respondents were less likely to prefer informal or parent/guardian care, and more likely to prefer center-based care. Parents of infants are more likely to prefer parent/guardian or informal care than those with older children.

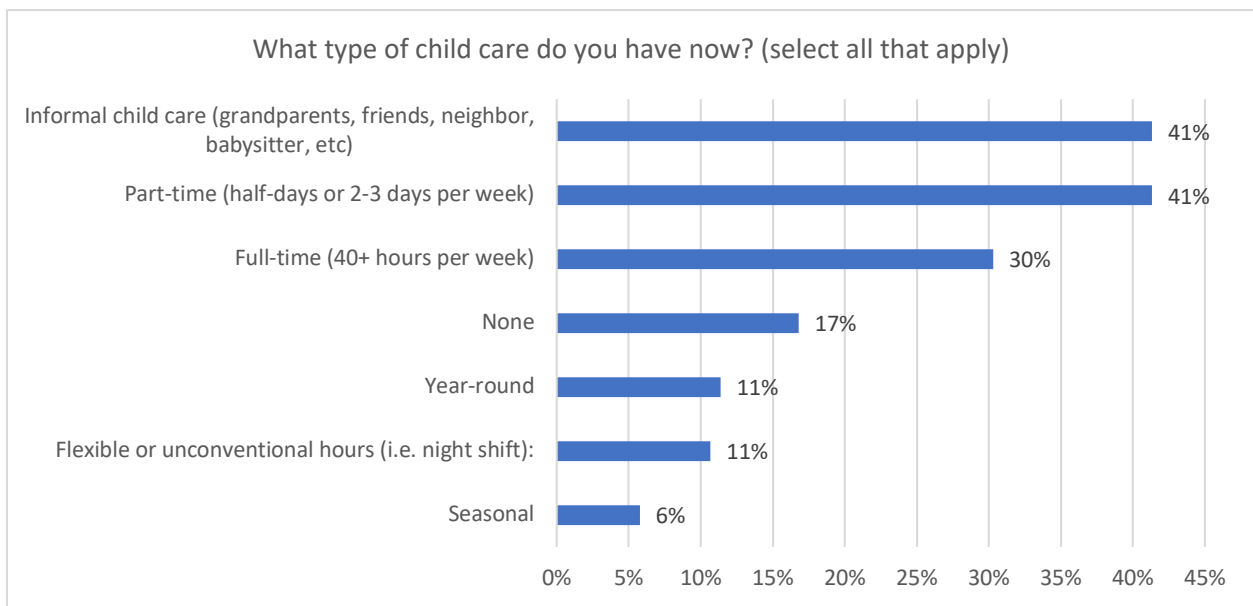


| Differences: "I prefer this type of child care" | <\$50,000 >\$50,000 | NW Bellingham | NW E | Single-Parent Dual-Parent | Parent of Infant |
|---|-----------------------|-----------------|--------|-----------------------------|------------------|
| Child care in a licensed child care center | 6% | -19% | -23% | 16% | |
| Child care in a licensed family home | 10% | 11% | - | - | |
| Part-time preschool program | 5% | -13% | -12% | - | |
| Informal child care (i.e. grandparents, neighbor, friend, other family, etc.) | -7% | - | - | -14% | 9% |
| Cared for by parent/guardian | - | -20% | -29% | -16% | 12% |

Q9: What type of child care do you have now? (select all that apply) (n=571)

Among respondents, informal and part-time care were most common. While all of these respondents expressed an interest in formal child care, 17% do not currently have formal or informal care. Most flexible/unconventional care needs reflected work schedules or COVID-19 impacts.

Respondents with incomes less than \$50,000 were slightly less likely to have part-time care and more likely to not currently have child care. Bellingham respondents were slightly less likely to be using informal care than both East and Northwest respondents, as well as being more likely than East respondents to have part-time care. Northwest respondents were more likely than East respondents to have part-time care and to have year-round care. There were no significant differences by race.



| | E Bellingham | NW Bellingham | NW E |
|---|----------------|-----------------|--------|
| Part-time (half-days or 2-3 days per week) | -16% | - | 20% |
| Year-round | - | - | 10% |
| Informal child care | 12% | 10% | - |

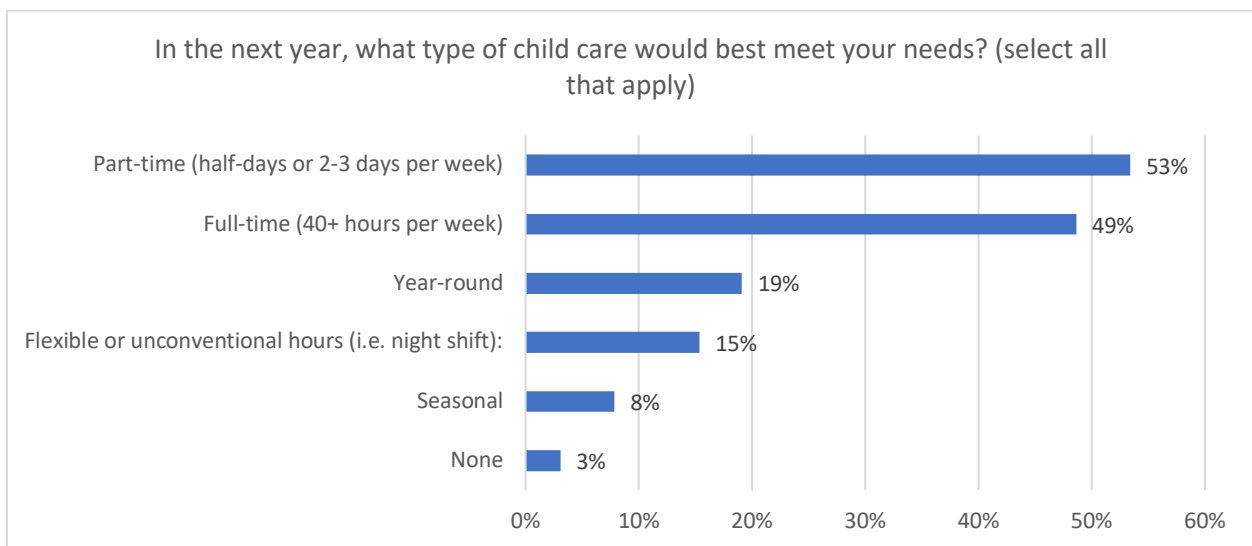
Q10: In the next year, what type of child care would best meet your needs? (select all that apply) (n=586)

In the previous question, 41% of respondents reported having part-time care; however, 53% would like part-time care. Similarly, 49% report wanting full-time care compared to 30% having full-time care. Similar disparities can be seen across care types. This is likely a reflection of the 50% of respondents who report that their current child care does not meet their needs due to cost, availability, or COVID-19 restrictions and impacts. For those looking for flexible options, work schedules and work schedule changes due to the pandemic were important factors.

There were no significant differences in the preferences by income, suggesting that the two groups have similar needs but those with incomes below \$50,000 are less likely to be having their needs met. Responses also do not vary significantly by race.

By region, East respondents were less likely than both Bellingham and Northwest respondents to want part time care (23 percentage points). East respondents were also less likely than Northwest respondents to want year-round care (13 percentage points).

Single parent/guardian respondents were more likely to want full-time care and less likely to want part-time care than respondents from dual parent/guardian households. Respondents with infants had no significant difference in needs from those who did not have an infant.



| | E Bellingham | NW E |
|---|----------------|--------|
| Part-time (half-days or 2-3 days per week) | -23% | 23% |
| Year-round | - | 13% |

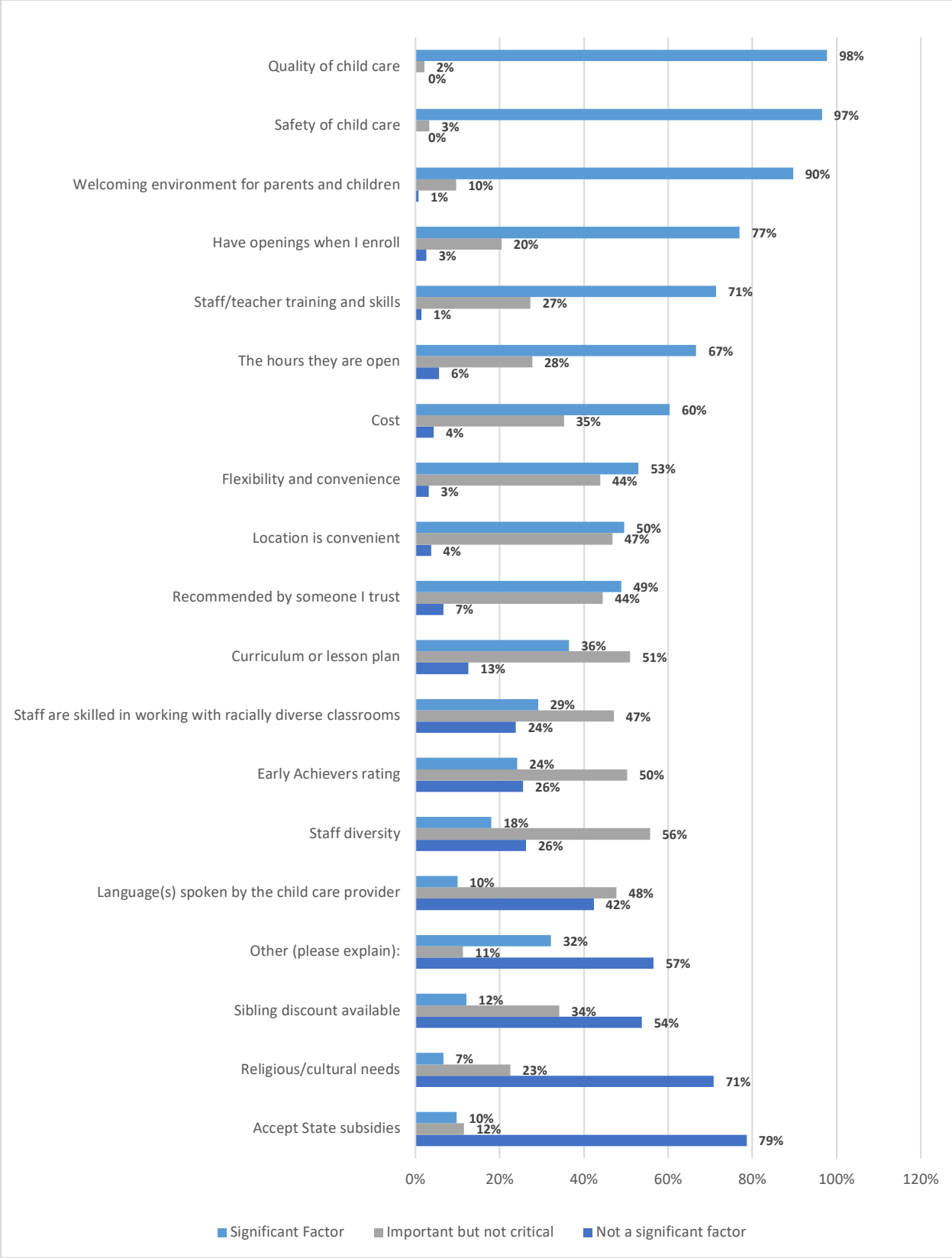
Q11: As a parent/guardian, there are a lot of things to consider when deciding what child care option is right for you and your child. What factors are most important when you are looking for child care? (n=573)

The top three most significant factors for these respondents when they decide what child care option is right for them are: quality (98%), safety (97%), and a welcoming environment (90%). Availability (77%), staff (71%), hours (67%), cost (60%), flexibility and convenience (53%), and location (50%) were all significant factors for at least half of respondents. Other more specific needs (i.e. subsidy acceptance, religious/cultural needs, sibling discounts, and languages spoken by provider) were important to a more narrow segment of the sample.

Respondents with incomes less than \$50,000 rated all the factors with more significance than respondents with higher household incomes, except for quality which was rated highly by both groups. Some of the largest gaps were accepting state subsidies, languages spoken, sibling discount, religious/cultural needs, and cost. By race, the biggest differences in responses were for accepting state subsidies and staff skill working with racially diverse classrooms, with BIPOC respondents more likely to rate the factors as *Significant* compared to White respondents.

By region, Bellingham and Northwest respondents reported the following as *Significant*, compared to East respondents: hours (less likely), curriculum (more likely), recommendation (more likely), and staff training (more likely). Compared to Bellingham respondents, both Northwest and East respondents more likely to say location is significant and less likely to say that staff skills in racially diverse classrooms is important. Lastly, compared to Northwest respondents, both Bellingham and East respondents were less likely to report Early Achievers ratings, languages spoken, and flexibility as important.

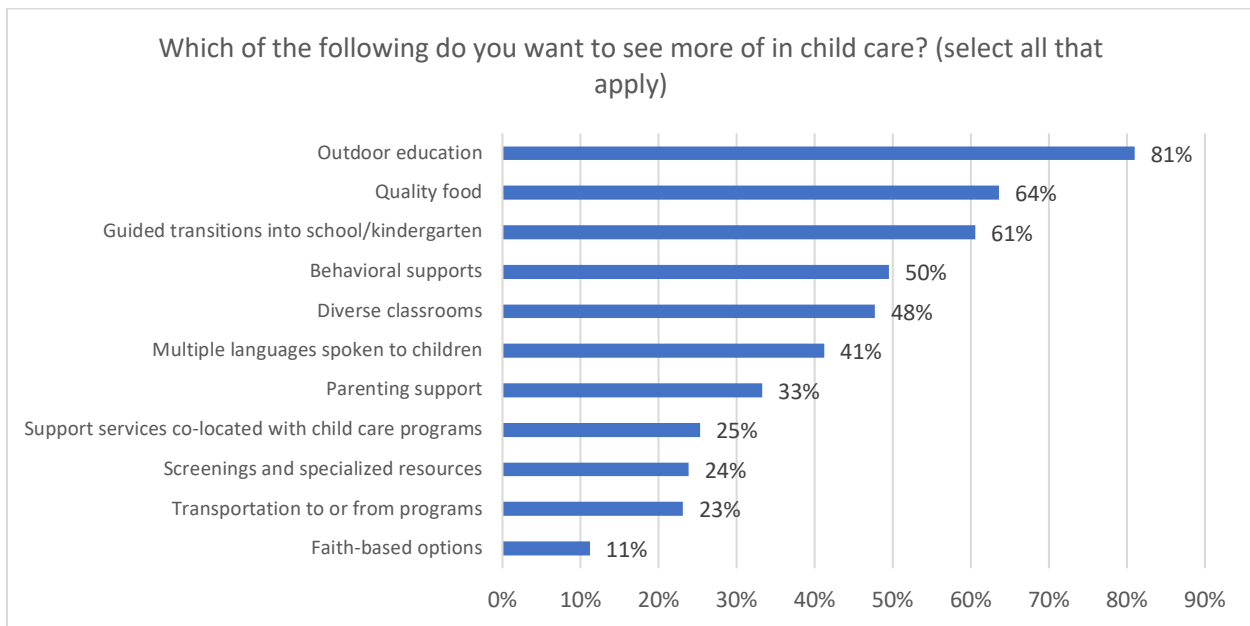
| Differences in % Rating Factor "Significant" | | | | | |
|---|---------------|-----------------------|----------------|-----------------|--------|
| | BIPOC White | <\$50,000 >\$50,000 | E Bellingham | NW Bellingham | NW E |
| Cost | - | 24% | - | - | - |
| The hours they are open | - | 11% | 16% | - | -15% |
| Location is convenient | - | 11% | 10% | 16% | - |
| Early Achievers rating | - | 10% | - | 10% | 14% |
| Staff diversity | - | 10% | - | - | - |
| Curriculum or lesson plan | - | 14% | -18% | - | 12% |
| Language(s) spoken by the child care provider | - | 16% | - | 12% | 10% |
| Sibling discount available | - | 13% | - | - | - |
| Religious/cultural needs | - | 6% | - | - | - |
| Accept State subsidies | 10% | 36% | 10% | - | - |
| Have openings when I enroll | - | 11% | 11% | - | - |
| Recommended by someone I trust | - | -7% | -19% | - | 24% |
| Flexibility and convenience | - | 9% | - | 11% | 16% |
| Staff/teacher training and skills | - | 8% | -17% | - | 16% |
| Other (please explain): | 14% | 7% | - | -13% | -10% |
| Staff are skilled in working with racially diverse classrooms | 14% | 9% | -14% | -16% | - |



Q12: Which of the following do you want to see more of in child care? (select all that apply) (n=553)

Looking at other child care attributes, there appears to be a strong preference for outdoor education (81%). Respondents would also like to see more quality food, guided transitions to school, behavioral supports, and diverse classrooms. Responses were similar between income groups, as well as between BIPOC and White respondents.

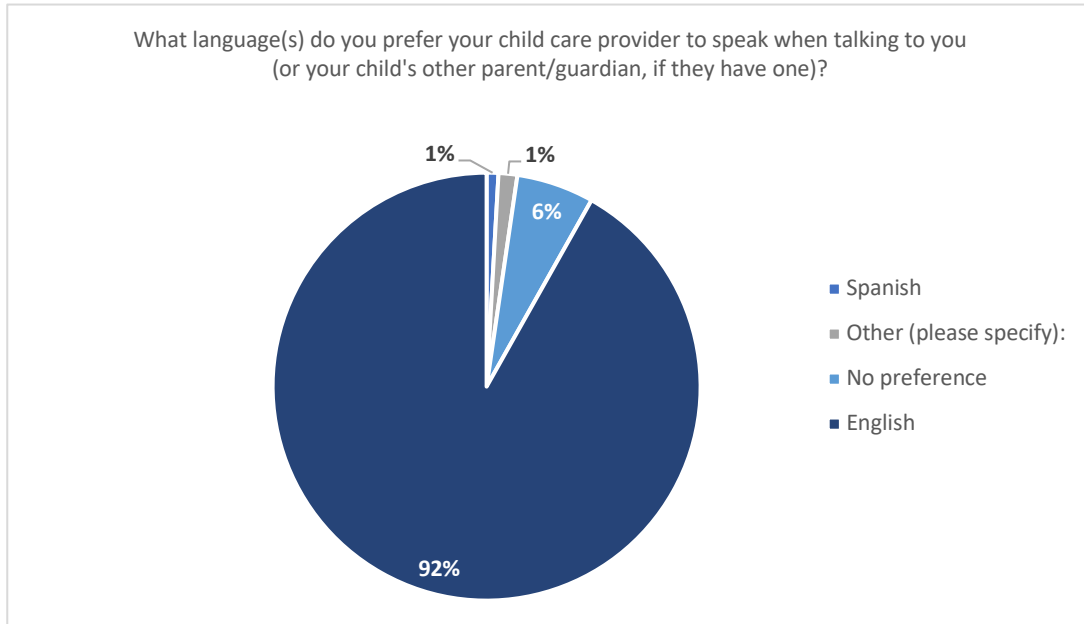
Compared to Bellingham respondents, East respondents were less likely to want to see quality food, outdoor education, parenting support, diverse classrooms, and multiple languages spoken; however, they were more likely to want transportation. Compared to Northwest respondents, Bellingham respondents were more likely to want diverse classrooms and less likely to want more faith-based options or transportation. Compared to East respondents, Northwest respondents were more likely to want to see more parenting support and multiple languages spoken; however, they were less likely to want more behavioral supports.



| | E Bellingham | NW Bellingham | NW E |
|--|----------------|-----------------|--------|
| Quality food | -11% | - | - |
| Outdoor education | -14% | - | - |
| Behavioral supports | - | - | -11% |
| Parenting support | -17% | - | 15% |
| Diverse classrooms | -30% | -25% | - |
| Faith-based options | - | 10% | - |
| Multiple languages spoken to children | -22% | - | 14% |
| Transportation to or from programs | 24% | 15% | - |

Q13: What language(s) do you prefer your child care provider to speak when talking to you (or your child's other parent/guardian, if they have one)? (n=564)

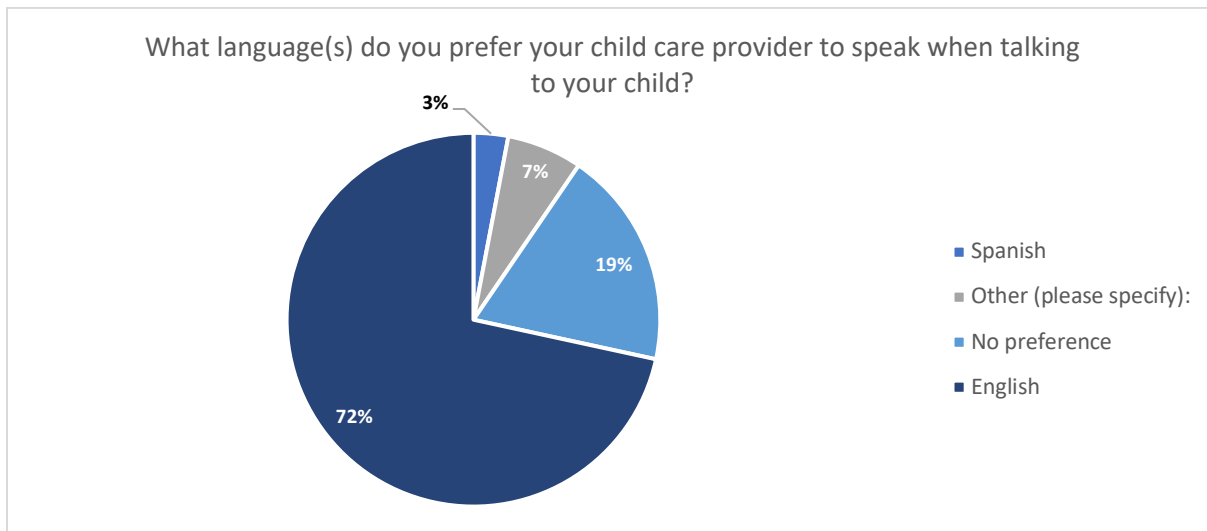
Most respondents (92%) want to be communicated with in English, 6% do not have a preference, 1% prefer Spanish, and 1% prefer another language. Respondents with incomes greater than \$50,000 were more likely to prefer English and less likely to have no preference than respondents with lower household incomes. There were no significant differences by region or race.



| Other (please specify): | |
|---|---|
| <ul style="list-style-type: none"> it's beneficial to a child to learn multiple languages. So I support many languages as long as it, doesn't cause any confusion for children | <ul style="list-style-type: none"> Any other language than English. My children being bilingual would benefit from hearing another foreign language. |
| <ul style="list-style-type: none"> Portuguese | <ul style="list-style-type: none"> Vietnamese |
| <ul style="list-style-type: none"> English / Japanese | <ul style="list-style-type: none"> If teaching language, talk to me the same as my kid. |
| <ul style="list-style-type: none"> Mandarin | <ul style="list-style-type: none"> Bilingual Spanish/english |

Q14: What language(s) do you prefer your child care provider to speak when talking to your child? (n=567)

In comparison, when asked what language respondents would like child care providers to use when communicating with their children English had a somewhat lower preference (72%), while a larger percentage had no preference (19%) or preferred Spanish (3%). For those who responded *Other*, many reported an interest in a bilingual environment (primarily English/Spanish). Respondents with incomes less than \$50,000 were less likely to prefer English and more likely to have no preference or be interested in another language. Both Northwest and East respondents were more likely than Bellingham respondents to prefer English. Northwest respondents were less likely than Bellingham respondents to have *No Preference*.

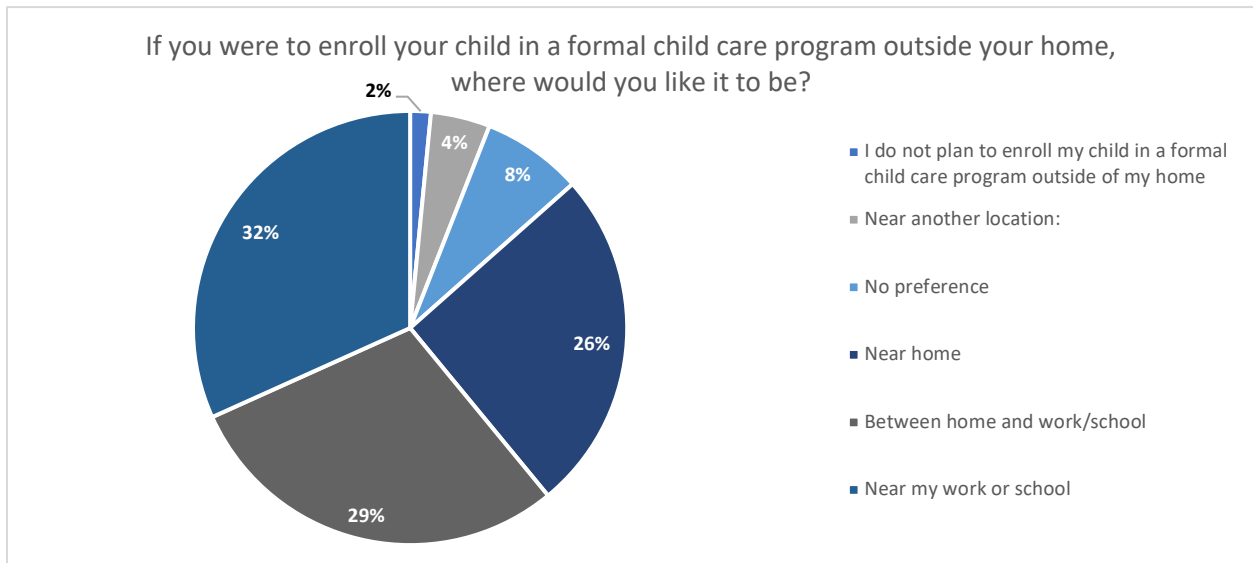


| Other (please specify): | |
|--|---|
| <ul style="list-style-type: none"> English and Spanish (13 respondents) | <ul style="list-style-type: none"> A combination |
| <ul style="list-style-type: none"> English + unspecified other language (8 respondents) | <ul style="list-style-type: none"> I would love my child to learn another language but we only speak english at home |
| <ul style="list-style-type: none"> Bilingual (6 respondents) | <ul style="list-style-type: none"> English / Japanese |
| <ul style="list-style-type: none"> English, but can understand child with aproxia. | <ul style="list-style-type: none"> Vietnamese |
| <ul style="list-style-type: none"> I'd want a structured program for a second language | <ul style="list-style-type: none"> English is preferred but would love a dual immersion program with any other language. |
| <ul style="list-style-type: none"> I wish they exposed to more languages in the classroom | <ul style="list-style-type: none"> Multiple |
| <ul style="list-style-type: none"> But want more language immersion options | <ul style="list-style-type: none"> Mandarin |
| <ul style="list-style-type: none"> Japanese | |

Q15: If you were to enroll your child in a formal child care program outside your home, where would you like it to be? (n=520)

Respondents were fairly evenly distributed between wanting child care near work/school (32%), between work/school and home (29%), or near home (26%). For those looking for child care near a location not listed, many respondents wanted child care near or on-site at their child’s school.

Preferences were similar between income groups, with respondents with incomes less than \$50,000 being slightly more likely to prefer care somewhere between home and work. Responses by region were also similar; however, Northwest respondents were 11 percentage points more likely to want child care near work/school compared to East respondents. There were no significant differences by race.

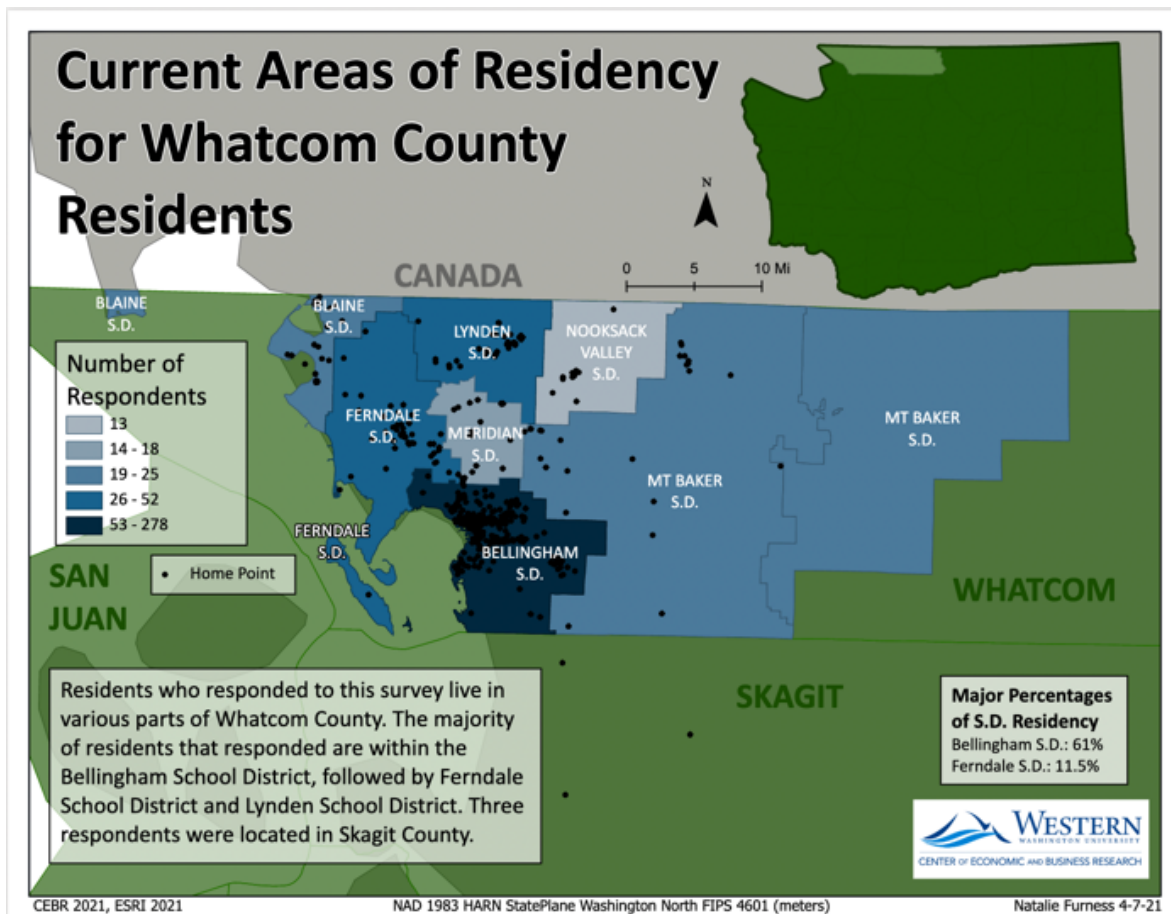


| Near another location: | |
|---|--|
| <ul style="list-style-type: none"> Child's school (15 respondents, Blaine schools and Kendall Elementary were each mentioned once) | <ul style="list-style-type: none"> My mom |
| <ul style="list-style-type: none"> grandparents home | <ul style="list-style-type: none"> Iummi early learning center |
| <ul style="list-style-type: none"> Location is not a top for me it is making sure my child is happy and comfortable there. | <ul style="list-style-type: none"> With younger sibling |
| <ul style="list-style-type: none"> A location with great access to outdoors or next would be school | <ul style="list-style-type: none"> Work is remote, so home is same as work. Outdoor locations preferred |

Q16: To help with our analysis, we would like to know approximately where you live (we will look at the information by school district or Census Tract). Please use the map below to drop a pin near where you live: (n=450)

This question was asked of respondents with children (0-5 and/or school age) who are open to formal child care. Based on this data, we see that the sample has an 11 percentage point overrepresentation of Bellingham residents and a 1-2 percentage point underrepresentation of residents of all other Whatcom County residents.

| School District | % Respondents | % Whatcom Households ⁶ |
|-----------------|---------------|-----------------------------------|
| Bellingham | 62% | 53% |
| Blaine | 5% | 9% |
| Ferndale | 12% | 14% |
| Lynden | 9% | 8% |
| Meridian | 4% | 5% |
| Mt. Baker | 6% | 7% |
| Nooksack Valley | 3% | 4% |

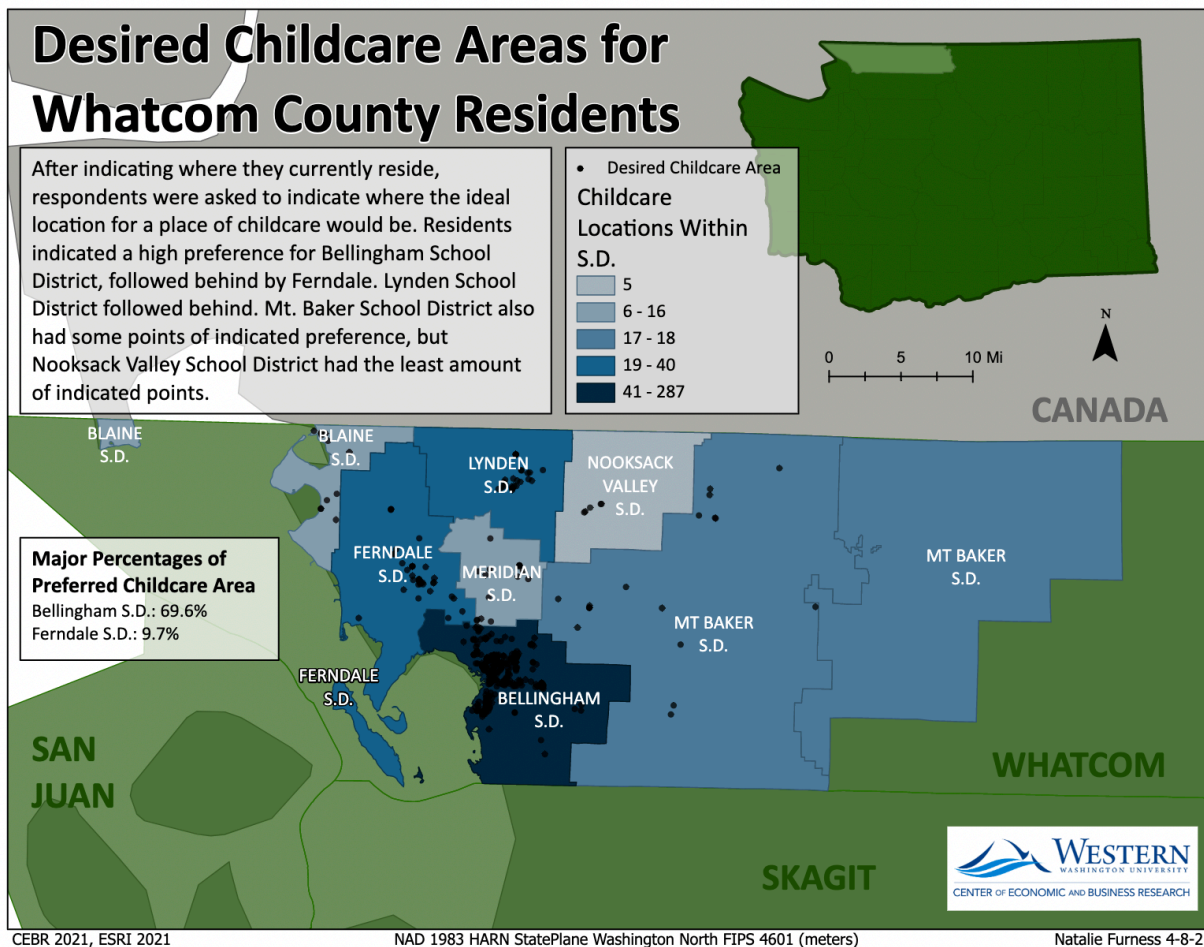


⁶ Census Reporter. "Profile." <https://censusreporter.org>

Q17: If you could choose the ideal location for child care, where would it be? Please use the map below to drop a pin near your ideal location: (n=412)

Given that most respondents want child care close to work or between work and school, this datapoint is important in determining where demand will be. In this case, many residents of other school districts want their child care to be located within in the boundaries of the Bellingham School District.

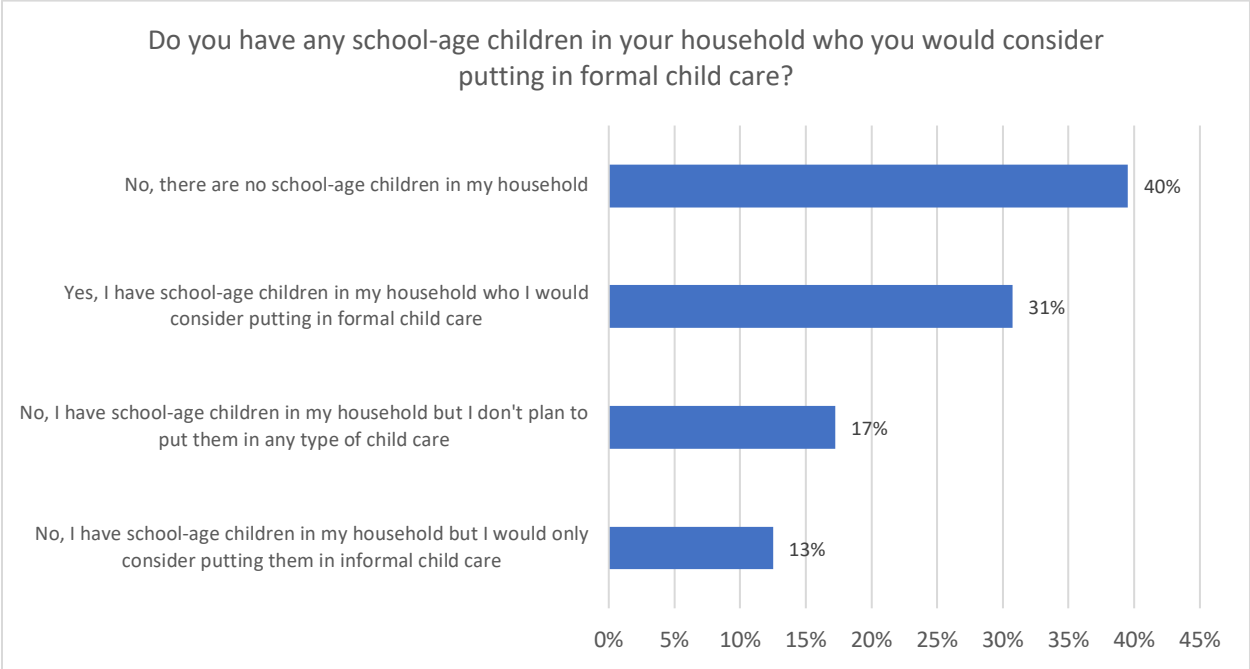
| School District | % Respondents |
|-----------------|---------------|
| Bellingham | 70% |
| Blaine | 4% |
| Ferndale | 10% |
| Lynden | 8% |
| Meridian | 4% |
| Mt. Baker | 4% |
| Nooksack Valley | 1% |



Respondents with School-Age Children

Q18: Do you have any school-age children in your household who you would consider putting in formal child care? (n=1,184).

Of those respondents who have school-age children in their household, 31% are interested in putting their child in formal child care. Respondents with household incomes greater than \$50,000 were slightly more likely to not have school-age children and slightly less likely to say they would only consider informal care for their school-age child. BIPOC respondents were more likely than White respondents to not plan to enroll their child in any form of child care. There were no significant differences between regions.



Q19: Using your mouse or finger, please drag and drop the following items in your order of importance when looking for child care for the school-age children in your household. Your top priority should be ranked as 1 and your lowest priority should be ranked 6. (n=348)

This question was only shown to those who have school-age children who they would consider putting in formal child care. When asked to rank importance for choosing school-age formal child care, respondents put the most weight on licensing status, enriching content, and partnerships with their child’s school. No respondents elaborated on their “Other” response. By region, the factors were ranked as follows:

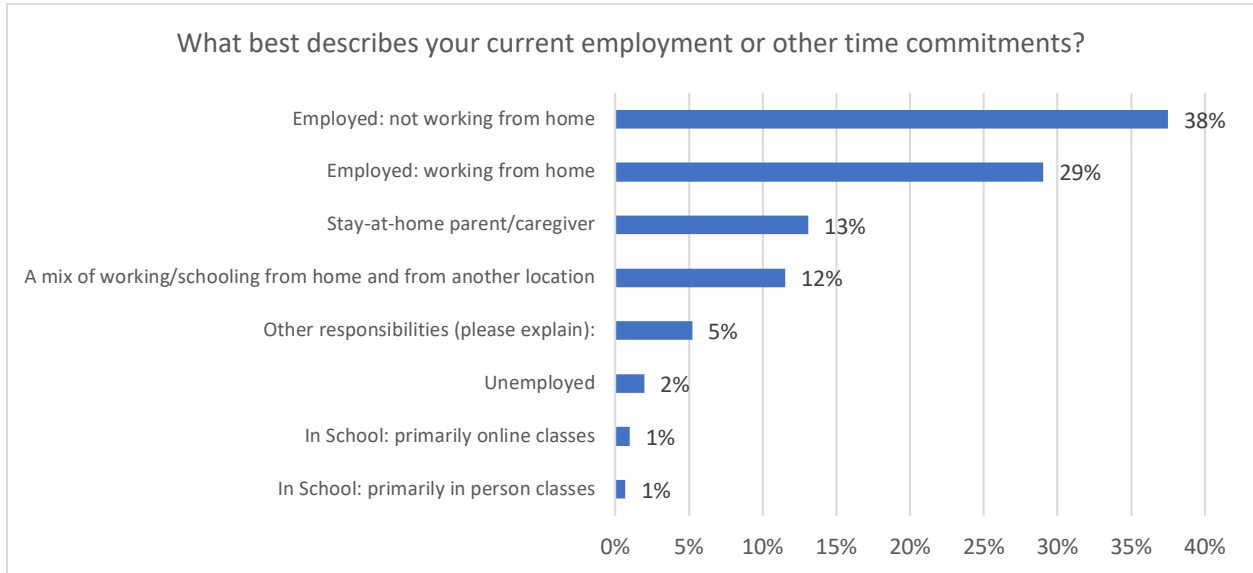
- Bellingham: enriching content, licensed child care program, partnership with school, offers care 5 days/week, same program as siblings, other
- East: licensed child care program, offers care 5 days/week, enriching content, partnership with school, same program as siblings, other
- Northwest: partnership with school, licensed child care program, offers care 5 days/week, enriching content, same program as siblings, other

| | Average |
|-----------------------------|---------|
| Licensed child care program | 2.83 |
| Enriching content | 3.01 |
| Partnership with school | 3.07 |
| Offers care 5 days/week | 3.16 |
| Same program as siblings | 3.91 |
| Other (please explain) | 5.03 |

Demographics

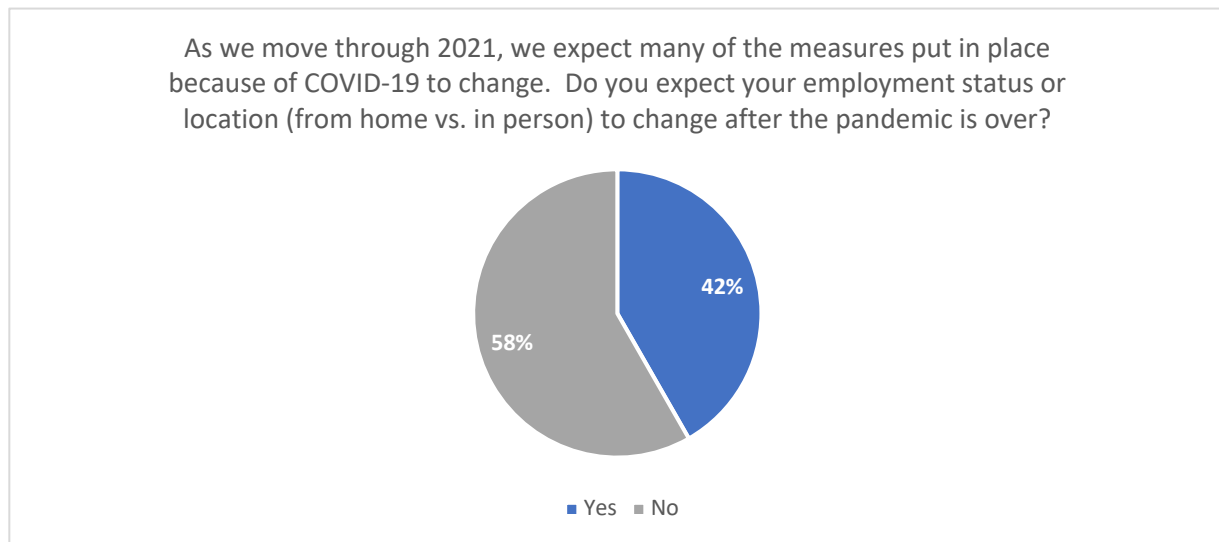
Q20: What best describes your current employment or other time commitments? (n=1,016)

Most respondents (67%) were employed and either working from home or in-person. Stay-at-home parents made up 13% of respondents and 12% were both working and attending school.



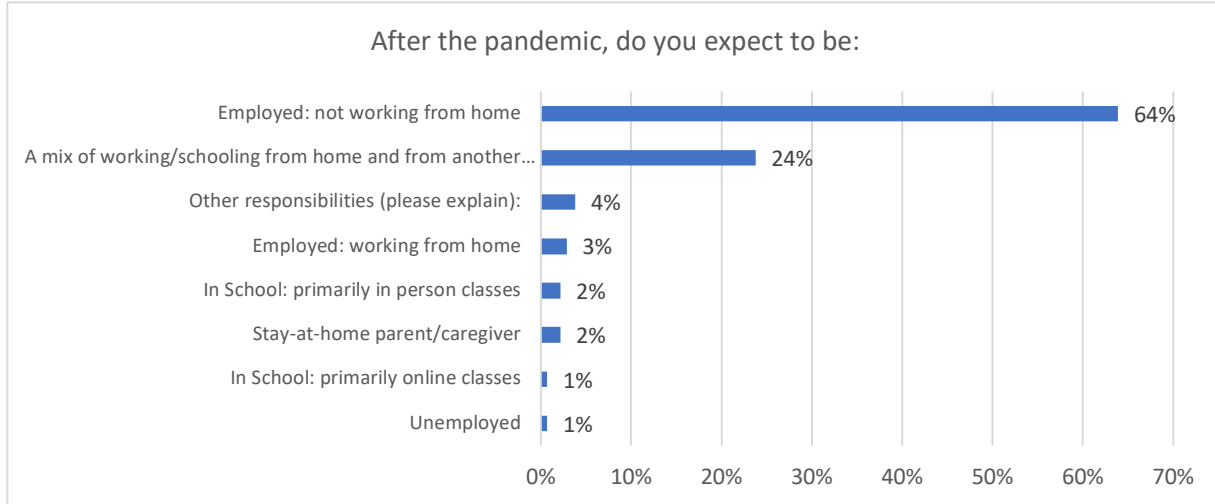
Q21: As we move through 2021, we expect many of the measures put in place because of COVID-19 to change. Do you expect your employment status or location (from home vs. in person) to change after the pandemic is over? (n=1,016)

In the coming year, 42% of respondents expected their employment status or location to change. If they responded *No*, they were directed to Q23.



Q22: After the pandemic, do you expect to be (n=421)

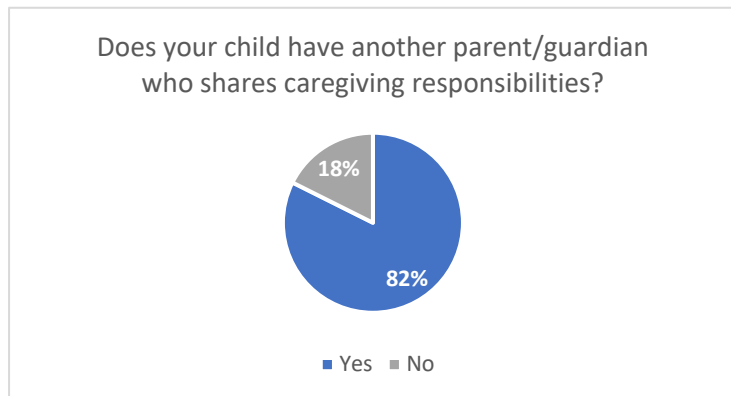
After the pandemic, the most common change was to working in-person. Those moving to in-person work may be coming from doing at-home work, being a stay-at-home parent/caregiver, or any other category.



| Other responsibilities (please explain): | |
|---|--|
| • Employed, mix of at-home and in-person (12) | • Stay-at-home parent and part-time work (2) |

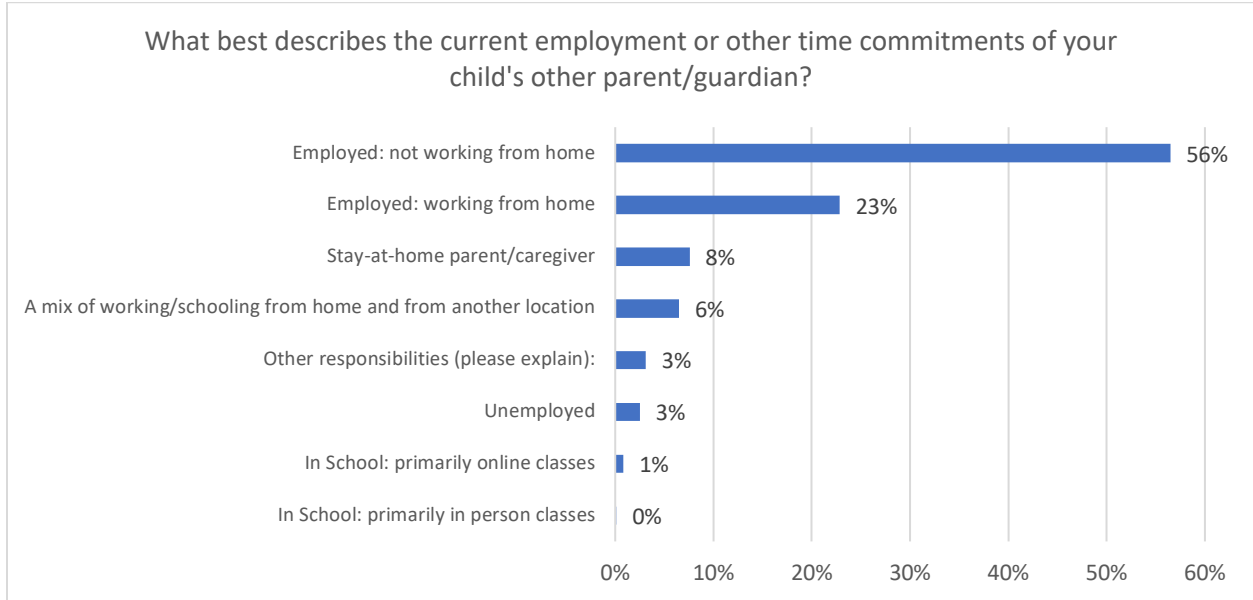
Q23: Does your child have another parent/guardian who shares caregiving responsibilities? (n=1,010)

Of the households surveyed, 82% of respondents reported that their child had another parent/guardian who shares caregiving responsibilities. If the respondent answered *No*, they were directed to Q27.



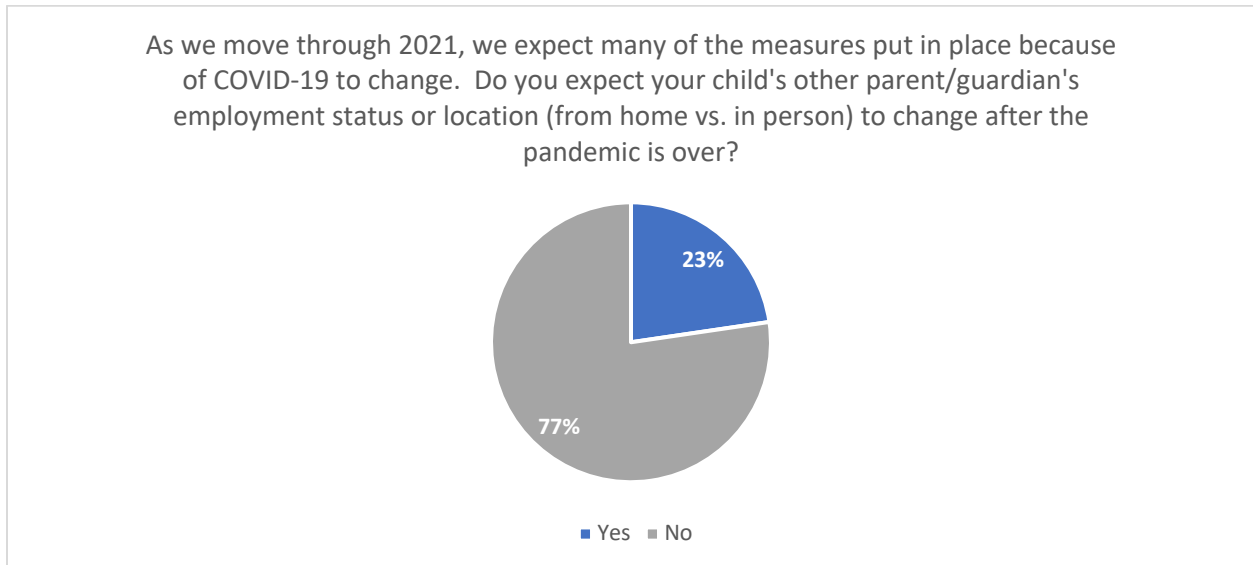
Q24: What best describes the current employment or other time commitments of your child's other parent/guardian? (n=832)

These second parent/caregivers were more likely to be working (especially in-person) and less likely to be a stay-at-home parent/caregiver.



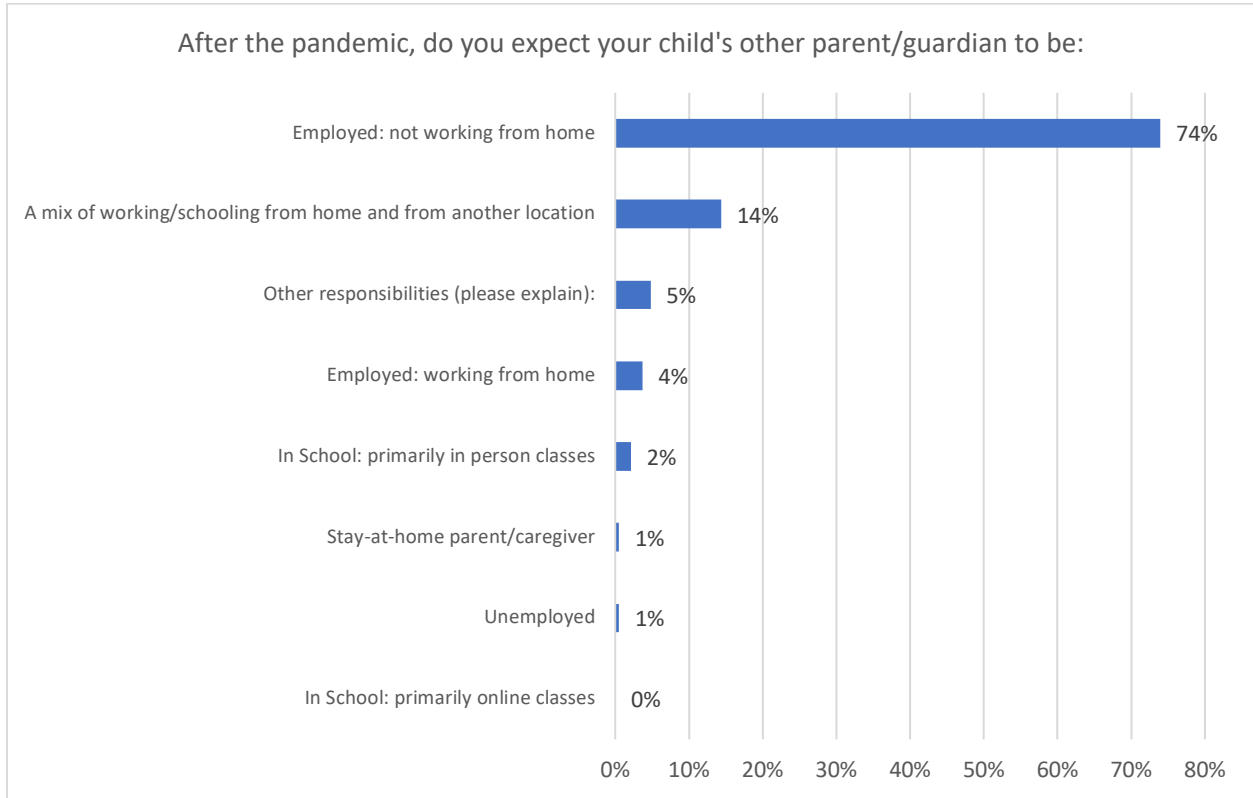
Q25: As we move through 2021, we expect many of the measures put in place because of COVID-19 to change. Do you expect your child's other parent/guardian's employment status or location (from home vs. in person) to change after the pandemic is over? (n=829)

Their employment status and location was also not as likely to change in the coming year. Those who said *No*, were directed to Q27.



Q26: After the pandemic, do you expect your child's other parent/guardian to be (n=188)

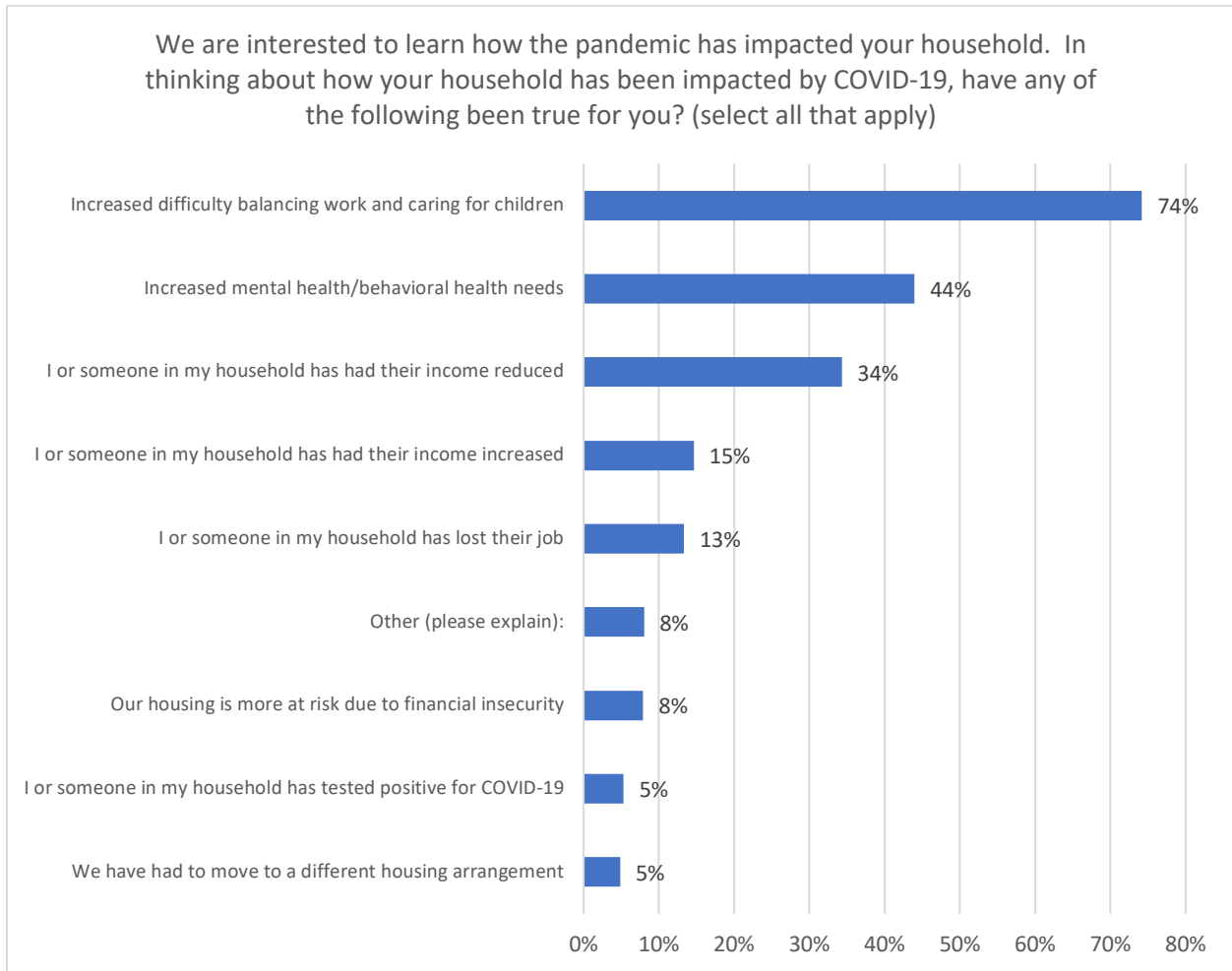
Again, a shift to in-person employment was most common.



| Other responsibilities (please explain): | |
|--|--|
| <ul style="list-style-type: none"> • More hours and not working at home (4) | <ul style="list-style-type: none"> • Retiring |
| <ul style="list-style-type: none"> • Working at a school (2) | <ul style="list-style-type: none"> • More travelling for work |

Q27: We are interested to learn how the pandemic has impacted your household. In thinking about how your household has been impacted by COVID-19, have any of the following been true for you? (select all that apply) (n=848)

Nearly three quarters of respondents experienced an increased difficulty balancing work and caring for children because of the pandemic. Increased mental and behavioral health needs were also common among this sample.



| Other (please explain): | |
|---|---|
| • Cost (13) | • Reduced employment (11) |
| • Child care availability/school closure (10) | • Child isolation (5) |
| • More involvement in child's education (4) | • Special needs support (4) |
| • Divorce/separation (4) | • Increased household responsibilities (3) |
| • Using leave to care for children (3) | • Spending more positive time with family (3) |
| • Increased stress (2) | |

Q28: How many children in your household are: (n=715-859)

Most respondents (62%) had at least one child between the age of 6 and 12. The other age groups were represented in between 13% (1 year old) to 26% (5 years old) of households surveyed.

| How many children in your household are: | | | | | | | | |
|--|------|-----|-----|----|----|-----------|------------|-----|
| | None | 1 | 2 | 3 | 4 | 5 or more | At least 1 | |
| Going to be born this year | 81% | 11% | 6% | 1% | 0% | 1% | 19% | 148 |
| Less than 1 year old | 83% | 17% | 0% | 0% | 0% | 0% | 17% | 130 |
| 1 year old | 87% | 13% | 0% | 0% | 0% | 0% | 13% | 95 |
| 2 years old | 79% | 20% | 1% | 0% | 0% | 0% | 21% | 156 |
| 3 years old | 77% | 23% | 0% | 0% | 0% | 0% | 23% | 171 |
| 4 years old | 77% | 22% | 1% | 0% | 0% | 0% | 23% | 165 |
| 5 years old | 74% | 25% | 1% | 0% | 0% | 0% | 26% | 189 |
| 6-12 years old | 38% | 40% | 19% | 2% | 1% | 0% | 62% | 529 |
| 13-17 years old | 79% | 16% | 5% | 1% | 0% | 0% | 21% | 153 |

Q29: Do you need child care that can provide specific services or support for your child's physical, mental, or medical needs? (select all that apply) (n=250)

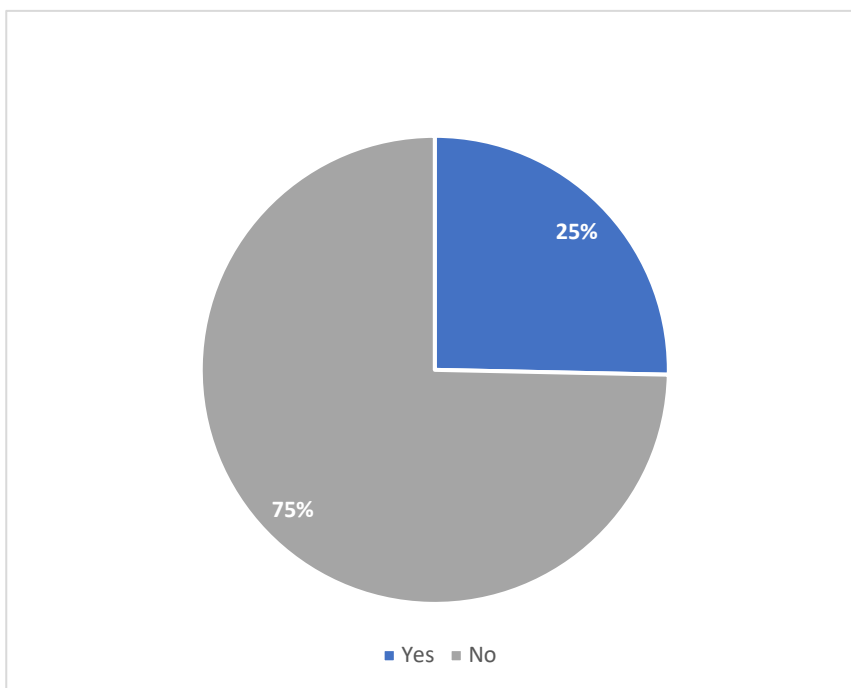
Withing the sample, 250 respondents were looking for specialized care. As a share of total survey respondents, the most common needs were for respite care (8.5%), therapeutic support (7.5%), behavioral support (6.9%), and mental health support (5.4%).

| Do you need child care that can provide specific services or support for your child's physical, mental, or medical needs? (select all that apply) | | |
|---|-------|------------------------------|
| | Count | Survey Respondents (n=1,312) |
| Respite care: short-term child care relief (a few hours to a few days or weeks) for primary caregivers | 111 | 8.5% |
| Therapeutic support (occupational/physical therapy, speech therapy, etc.) | 99 | 7.5% |
| Behavioral support | 91 | 6.9% |
| Mental health support | 71 | 5.4% |
| Other: | 19 | 1.4% |
| Specialized medical support | 11 | 0.8% |
| Physical accommodations for a disability | 5 | 0.4% |

| Other: | |
|--|--|
| • Physical Activity (3) | • High Cost |
| • Allergies and Dietary Requirements (3) | • Children miss other children |
| • Arts/Cultural Enrichment (2) | • Type 1 Diabetes |
| • More Mental/Behavioral Health Training and Availability for Child Care (2) | • Needs are being met without child care |
| • Speech | • Autism support |
| • Help with school work (tutoring) | • ABA Therapy |
| • Highly capable learner | |

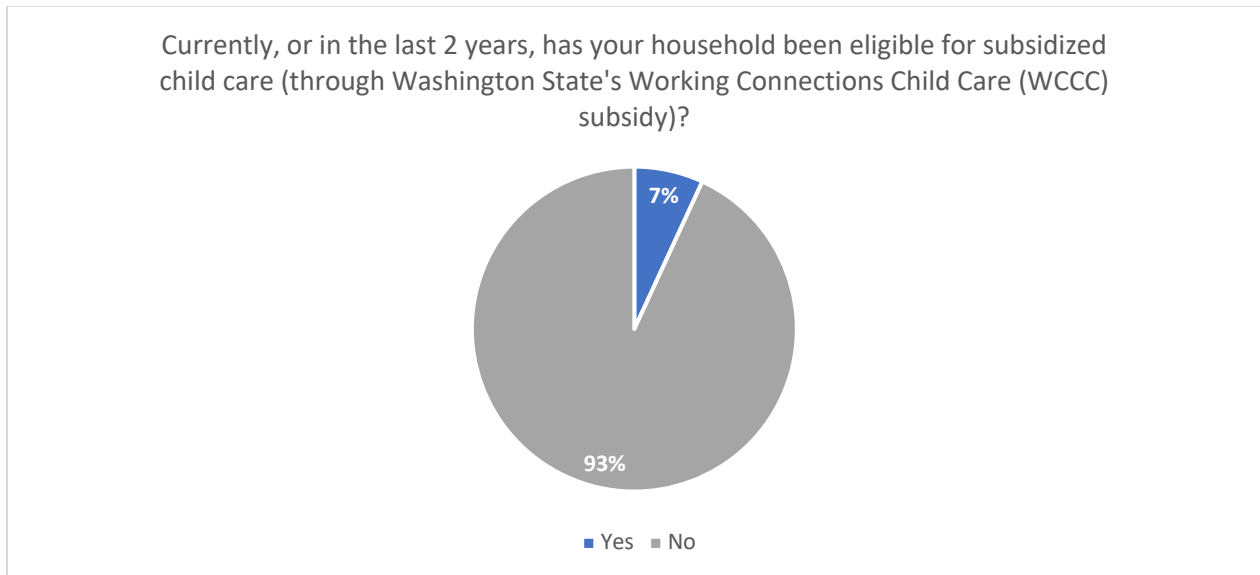
Q30: Have you ever used a child care option that you were uncomfortable with out of necessity (such as leaving your child home alone or in the care of someone you did not feel safe leaving your child with)? (n=995)

Approximately one-quarter of respondents reported that they had used a child care option in the past that they did not feel safe with. Further research could determine what the source of this discomfort was (i.e. pandemic safety concerns, children left home alone, etc.) and what factors contributed to this option being a necessity. There is no significant difference in responses by race; however, respondents with household incomes less than \$50,000 and single-parent respondents were more likely to have used care they were uncomfortable with.



Q31: Currently, or in the last 2 years, has your household been eligible for subsidized child care (through Washington State's Working Connections Child Care (WCCC) subsidy)? (n=770)

In this sample, 93% of respondents reported that they were not eligible for WCCC. Based on the incomes reported in the survey, it would appear that many respondents may not realize that they are eligible for subsidized child care.



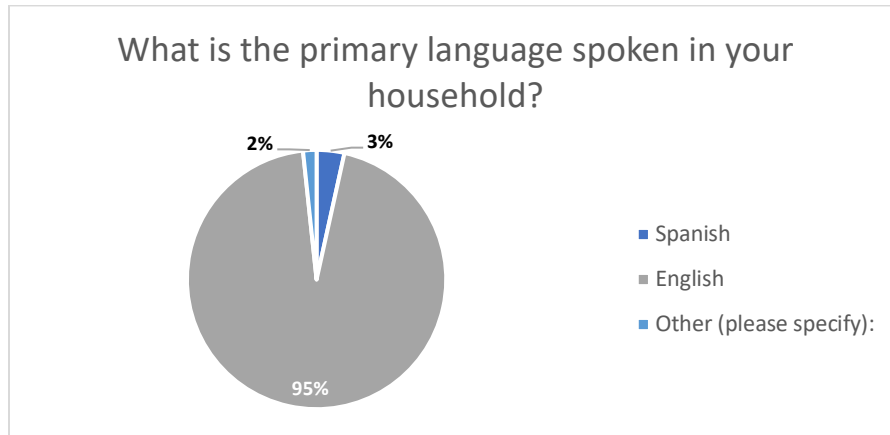
Q32: Would someone in your household consider themselves any of the following? (select all that apply) (total selections = 79)

Among all survey respondents, 2.1% were foster parents, 1.8% were members of a First Nation, 1.4% had experienced homelessness in the last 3 years, 0.5% were currently experiencing homelessness, and 0.2% were migrant farm workers.

| Would someone in your household consider themselves any of the following? (select all that apply) | | | |
|---|----------------------------------|-------|------------------------------|
| | % of Question Respondents (n=79) | Count | Survey Respondents (n=1,312) |
| Foster parent | 39% | 28 | 2.1% |
| A member of a First Nation | 32% | 23 | 1.8% |
| Experienced homelessness in the last 3 years (including doubled up, couch surfing, staying in an emergency shelter, etc.) | 26% | 19 | 1.4% |
| Currently experiencing homelessness (including doubled up, couch surfing, staying in an emergency shelter, etc.) | 8% | 6 | 0.5% |
| Migrant farm worker | 4% | 3 | 0.2% |

Q33: What is the primary language spoken in your household? (n=1,012)

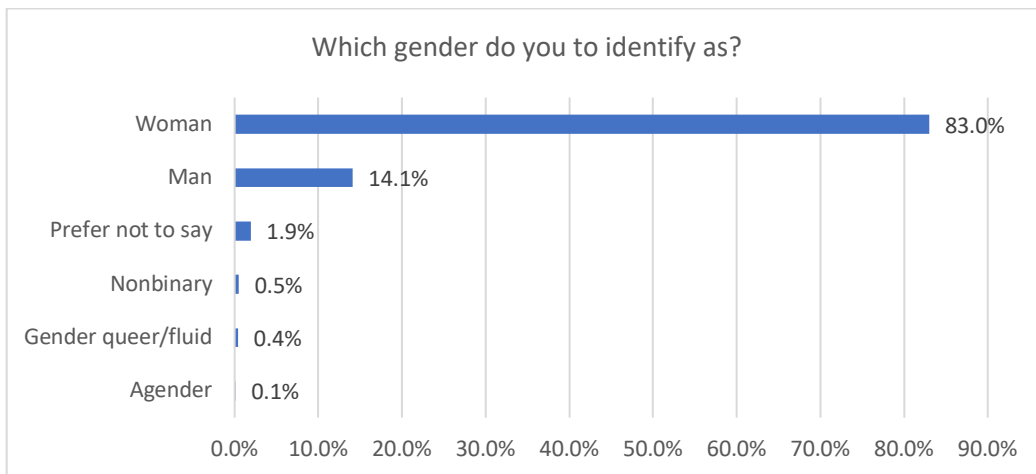
Survey respondents primarily spoke English in their household (95%), with 3% speaking Spanish and 2% speaking another language.



| Other (please specify): | | | | | |
|-------------------------|--------------|------------|-------------|--------------|----------|
| • Punjabi (3) | • German (2) | • Japanese | • Gujrat | • Vietnamese | • Arabic |
| • Spanish (2) | • Romanian | • Russian | • Cantonese | • Chinese | |

Q34: Which gender do you prefer to identify as? (n=993)

The majority of respondents identified as women (83%) with 14% identifying as men.



Q35: What race(s) are represented within your household? (select all that apply) (total responses = 1,129, n=983)

Overall, the respondents to this survey appear to reflect the racial makeup of Whatcom County well. The data is not directly comparable to Census data because the survey captures the racial makeup of households and Census data represents individuals. For instance, a household may consist of individuals of different races, but the individuals may not be multi-racial. The “Survey Households (adjusted)” column subtracts all multi-racial households from the individual race calculations and into the “Multi Racial” category.

| What race(s) are represented within your household? (select all that apply) | | | |
|---|-------------------|------------------------------|---------------------|
| | Survey Households | Survey Households (adjusted) | Whatcom Individuals |
| American Indian or Alaska Native | 3.9% | 0.7% | 3.4% |
| Asian | 5.6% | 1.1% | 4.8% |
| Black/African American | 3.2% | 0.3% | 1.3% |
| Native Hawaiian or other Pacific Islander | 0.9% | 0.1% | 0.3% |
| White/Caucasian | 83.3% | 82.5% | 86.2% |
| Some other race (please specify): | 3.2% | 1.9% | N/A |
| Multi Racial | N/A | 13.3% | 4.0% |
| Total | 100% | 100% | 100% |

| Some other race (please specify): | | |
|-----------------------------------|----------------------|-------------|
| • Hispanic (11) | • Multi-Racial (2) | • Human (2) |
| • Latinx (4) | • Middle-Eastern (3) | • Jewish |
| • Mexican (4) | • Spaniard (3) | • European |

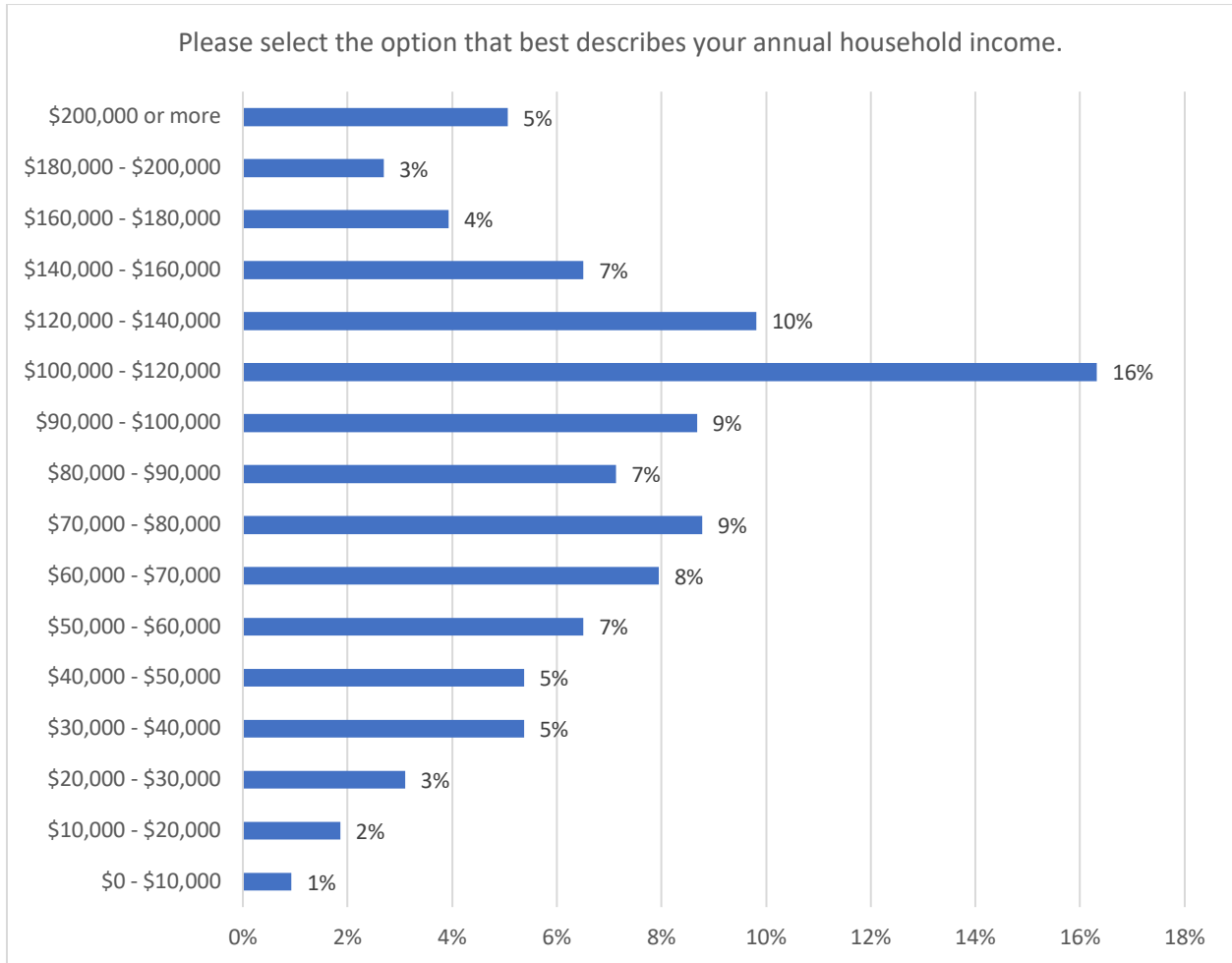
Q36: Is anyone in your household of Hispanic, Latino, or Spanish origin? (n=986)

In terms of Hispanic, Latinx, and Spanish heritage, the sample appears to accurately reflect the Whatcom County population.

| Is anyone in your household of Hispanic, Latino, or Spanish origin? | | |
|---|--------|---------|
| | Survey | Whatcom |
| Yes | 11.0% | 9.8% |
| No | 89.1% | 90.2% |

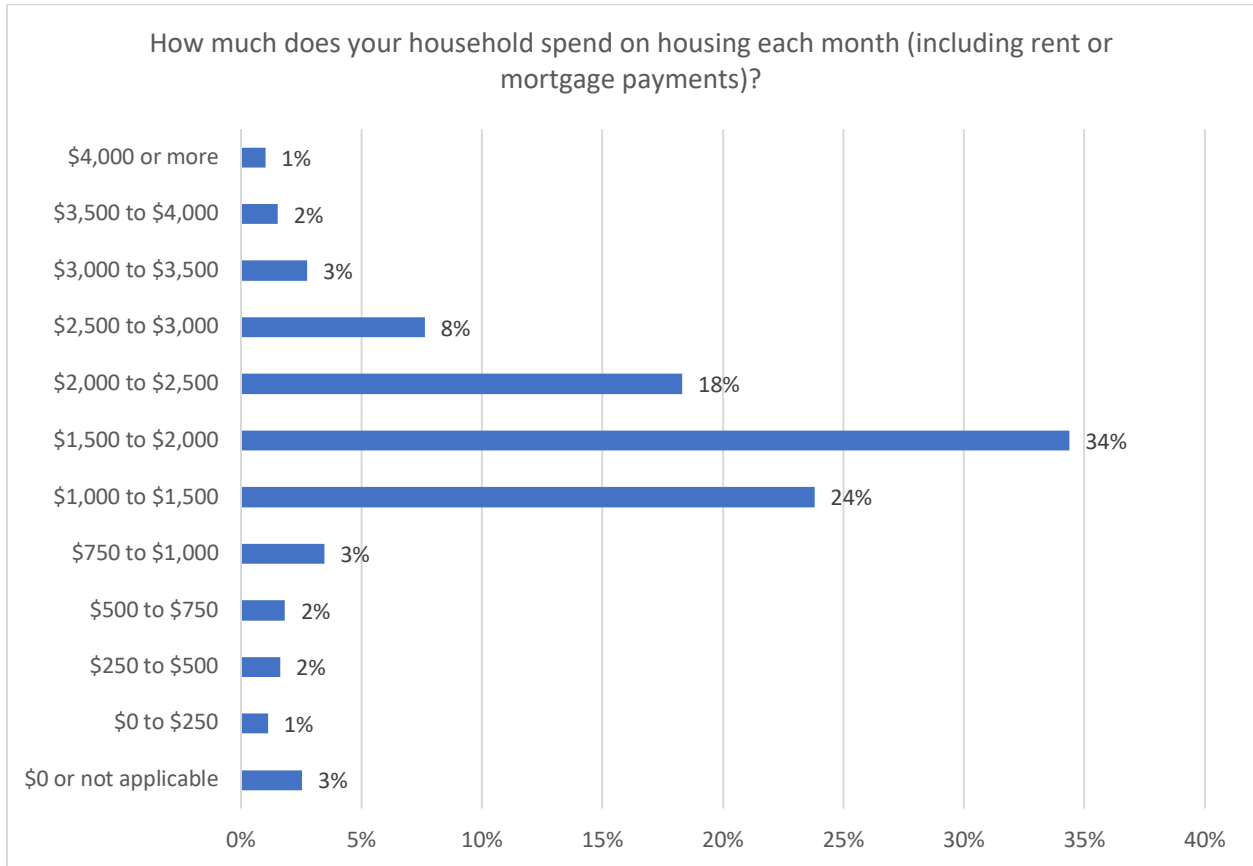
Q37: Please select the option that best describes your annual household income. (n=968)

According to the Census Bureau, the median household income in Whatcom County in 2019 ranged from \$74,005 for a two-person household, up to \$96,303 for a 4-person household. This is similar to the median income in this sample, which was somewhere between \$80,000 and \$100,000.



Q38: How much does your household spend on housing each month (including rent or mortgage payments)? (n=983)

The median household spending on housing each month in the sample is somewhere between \$1,000 and \$2,000. 66% of respondents spend between \$1,000 and \$2,500 per month on housing.



Discussion Group Feedback

For the discussion groups, we focused on highlighting the voices of individuals who were geographically underrepresented in the survey and BIPOC respondents who are more likely to be excluded from systems of support. In addition, a discussion group was held to gather the feedback of employers within Whatcom County.

Parent/Guardian Groups

For this series of questions, four discussion groups were held: one for residents of eastern Whatcom County, one for residents of northwestern Whatcom County, and two for individuals in BIPOC households.

There was a total of 12 participants in this series of parent/guardian discussion groups. All groups were asked the same series of questions. Response for all participants will be consolidated below, with any notable differences between discussion groups being noted. While the number of participants is small and cannot be seen as representative of the county as a whole or any individual demographic group, the narratives presented help to add more depth to the statistical survey's data.

Across all groups, one common theme was stress surrounding child care and wanting to do what is best for their child. Participants are looking for someone who can give their child individualized attention and support while they are not there to do so.

In addition to this commonality, themes arose that were specific to each group. For example:

- Geographic Discussion Groups:
 - More likely to have a hard time finding child care near their home/work

- BIPOC Discussion Groups:
 - Initiated conversations surrounding equity and diversity in child care
 - More likely to prioritize racial and economic diversity in child care

Overall, these discussion groups further demonstrate Whatcom County's struggle with child care availability and affordability. Specific needs arose that could be addressed in the short term, including making information on child care in Whatcom County more centralized and accessible. One suggestion is to create a website with information on waitlists, child care options, and available subsidies, as well as having an interactive page for parents to be able to search for all licensed providers in their area.

Background Information

Let's begin with getting to know each other a little. Could we go around the digital table and quickly introduce ourselves and share the age or ages of our children, what type of types of childcare you normally use?

The east-county group had two participants with children ranging from 4 to 7 years old who have used licensed centers, licensed homes, and informal care. The northwestern county group had seven participants with children ranging in age from infants to school-age. This group also drew from a wide range of incomes and child care utilization – from high-end daycares to informal care, parent care, and subsidized care. A wide range of careers were also represented, which offered varying levels of remote work opportunities and scheduling needs. For the BIPOC discussion groups, there were three participants with children between 2 and 14 years old. They utilized the YMCA, ECEAP subsidized care, and licensed child care homes. Amongst all participants, there was a shared level of stress expressed about finding child care that will be reliable, affordable, and available, while also meeting their unique schedule needs.

COVID Impacts on Routine

Ok, the elephant in every room is COVID. How disruptive has COVID been to your normal childcare routine?

Responses ranged from significant impacts – reduced child care availability, more parent care, and more informal care utilization – to negligible changes for essential workers and those previously using informal or parent care.

Changed Preferences Due to Pandemic

How has COVID changed what you might be looking for childcare?

Most participants planned to return to their normal child care routine post-pandemic. This is in keeping with the survey findings that suggested a 61 percent increase in working in-person after the pandemic, accompanied by a 66 percent decrease in working from home and a 30 percent decrease in stay-at-home parents/caregivers. However, some were considering moving to facilities who put a higher value on cleanliness and safety. For those expecting to permanently shift to remote or hybrid work, child care demand may decrease or move toward in-home care. Differences in responses varied primarily by career, with the biggest factor influencing child care decisions being the mother's career.

Child Care Utilization Decisions

There are several options for childcare – a Center, a licensed family home are probably the most typical but co-ops and family or friends. I am interested to know your thoughts on how you decide which you would prefer?

Several key factors were reiterated across *all* groups:

- Cost
- Availability/waitlist – especially for infant care
- Dependability
- Word of mouth
- Safety
- Student-staff ratio
- Opportunities for socialization
- Structure and academics

Diversity was mentioned as a factor during the BIPOC focus groups. For those not currently utilizing formal child care, barriers include cost and inflexible scheduling. With these barriers reduced or removed, all participants were open to using formal child care.

Quality Metrics

Quality or some sense of the term often comes up in talking about childcare. What do you think quality means for childcare? How do you know when you see it?

Throughout the discussions, there was a focus on staff engagement and training. Quality metrics were consistent across all groups. Many participants viewed child care as taking the place of parent care during the day, so they were hoping their child would receive individualized attention and support while engaging in activities, learning, and play. In addition, the following were common themes:

- Reliability
- Cleanliness
- Outside spaces
- Staff training in early childhood education/psychology
- Look/feel
- Student-teacher ratio
- Positive word of mouth
- Detailed/personalized staff feedback at the end of each day
- Quality of staff interactions
- Academics, activities, and play
- Safety
- Accessibility
- Meets scheduling/transportation needs
- Early Achievers rating

While participants identified aspects of quality that are important to them, they also noted that they are not generally able to choose between different facilities. As soon as they got off a waitlist, they enrolled because they could not find space anywhere else.

Equity and Diversity

When thinking about quality child care, how does equity and diversity factor into your decision making?

As a follow-up to the previous question, participants in all groups were asked how equity and diversity fit into the quality metrics they use when looking for care. For the eastern and northwestern groups, equity and diversity were lower down their list of priorities – availability and cost largely determine options in a child care desert. Some participants mentioned looking for income diversity (providers who accept subsidies) or providers with aligned values in terms of equity and diversity. Participants in all groups noted that they do not see Whatcom County as racially diverse.

The BIPOC discussion groups, on the other hand, put greater importance on both income and racial diversity. For one participant, it took going to another city to realize that their adopted child had never met someone of the same race in person. This realization led them to search for more diversity when looking for preschool programs so their child feels like they fit in and can see themselves reflected in their peers.

Staff Training

Another aspect of quality is staff training. What would you expect if a child care provider said that they have “trained staff”?

Common responses include:

- CPR/first aid
- Early childhood development, psychology, or education training
- History of providing child care
- Training on facility policies and procedures
- Head Start or Early Achievers

Expected Child Care Activities

When you place your child in childcare, whichever form you select, what do you expect them to do while they are in that care?

Many participants stressed the importance of structure including:

- Developing social skills
- Activities
- Shared meals
- Playing
- Academics
- Individualized attention from staff
- Physical activity
- Outdoor time

Ideal Provider

Imagine you are using the very best childcare provider in the world. How does your expectations change?

The common theme across all discussion groups was individualized staff attention. This comes in the form of attention and support for the child, as well as detailed feedback for the parent and suggestions for reinforcing what was learned in child care at home. Other suggestions included teaching another language, providing more outdoor activities, and having higher-quality food.

Outdoor Education

Outdoor education – what does this mean to you?

Within the survey, there were many respondents who indicated that they would like to see more outdoor education opportunities in child care. While outdoor education was not specifically mentioned by discussion group participants in earlier questions, they were prompted here to elaborate on what outdoor education means to them. There was a consensus among participants that outdoor education would include:

- Daily outdoor time
- Physical activity
- Basic nature/science lessons

Biggest Challenges

What are the biggest challenges in finding the care you would prefer for your child or children?

Availability and cost were the two biggest barriers across all three groups. Hours of operation were also important for those with non-traditional work schedules.

Unmet Needs

In thinking about these challenges, do you have any specific needs that you feel are not being met by your child care provider?

To follow up on the question surrounding challenges, participants were prompted to elaborate on needs that were not being met. Hours/months of operation were the biggest unmet needs. Transportation, affordability, and the ability to consider factors other than availability were also mentioned as unmet needs. Those in the northwest group also mentioned the lack of providers near their home/work.

Concluding Comments

We ask you here today to talk about childcare in Whatcom County. What have we not talked about that you expected or wanted to talk about?

The most common responses focused on the lack of affordable child care in Whatcom County. They note that to attract more providers, they need to be paid better; however, this increased availability would decrease affordability. Many also expressed hope that their contributions to the survey and discussion groups would help to inform the expansion of affordable child care in the county.

Others noted that “the biggest stressor as a working mom is child care,” and that child care can keep many people out of the workforce or working fewer hours than they would prefer. Expanded hours of operation, improved food quality, and more transportation availability were also mentioned.

One respondent highlighted a struggle that had been expressed by others in passing: there is no widely known way to find all licensed child care providers and search by needs (i.e. location, cost, hours, support for special needs). Instead, most information is spread by word of mouth. A website with information about child care (i.e. when to get on an infant care waitlist) and the options available within Whatcom County has the potential to be a low-cost way to reduce some barriers for those looking for care.

Employer Group

In addition to the discussion groups with parents/guardians, United Way also reached out to its contacts within the business community to assemble a discussion group of employers. Based on this discussion with two Whatcom County employers, a few key themes emerged:

- Community organizations like United Way have the potential to:
 - Get employers thinking about child care
 - Build coalitions and support among this community
 - Advocate for action
- The child care schedules offered by many providers do not accommodate nontraditional hours
 - 12-hour shifts
 - Night shifts
 - 4-day weeks
- Many employees are relying on multiple providers to meet their child care needs:
 - Barriers: availability, cost, and scheduling
 - Outcomes: stress, missed work days, and leaving the labor force
 - Both participants noted a disproportionate impact on mothers
- There is a lot of discussion surrounding child care in the community, but little action

Background Information

Please tell us a little bit about yourself and where you work.

This discussion group was attended by two employers of different sizes from adjacent industries. These companies tend to have work hours outside the typical 9-5 and lower representation of women in the workforce.

Current Child Care Support

I am curious, what kind of childcare support is currently offered by your companies?

Both participants highlighted a lack of employer support for child care within their own businesses and the general community. Dependent-care reimbursement, more flexibility with working from home post-pandemic, and paid parental leave were mentioned as current practices.

Future Considerations for Child Care Support

Has anyone started anything new or is considering something new?

Given the long shifts associated with both businesses, traditional child care may not work with employees' schedules. The employers also noted the child care shortage in Whatcom County and proposed the possibility of employer-sponsored child care providers.

Community Partners

Who do you partner with (or would like to partner with) to help develop childcare solutions for your employees?

United Way, the Opportunity Council, and child care providers were all mentioned. For smaller employers, this may come less in the form of direct communication and consultation, but rather through donations to support the work being done by these organizations. It should be noted that outreach for this focus group was conducted by United Way through their contacts and partners.

Employee Experiences

What are you hearing from your employees about childcare?

Feedback was generally negative, with the employers citing high costs, long waitlists, and child care offerings that do not match employee shift schedules. This results in many employees relying on a variety of different child care options, both formal and informal, to meet their weekly needs.

According to participants, these child care struggles have led employees to use vacation days or miss shifts when they have last-minute changes to the availability of their informal child care options. In terms of staff retention, both employers said that they have seen the high cost of child care and availability limitations push employees (especially women) out of the workforce.

Community Creativity

Do you feel that we are creative enough as a community for childcare?

According to one employer, they have seen “a lot of talk, but not a lot of action.” While the creativity may be present, both participants want to see more implementation of these plans and progress toward improved child care availability and affordability. For large employers, it was suggested that they could fund their own child care centers to meet employee needs. For smaller employers, however, the consensus was that community organizations like United Way or the Opportunity Council are better positioned for advocating for these needs.

Public Policies

If you had a magic wand, are there any public policies you would change to help address childcare issues?

The primary lever cited was subsidization. Not only did the employers want to see an increase in subsidy availability and acceptance, but they also wanted to see higher subsidy rates to match private-pay rates.

Suggestions for Company Support

Not quite as magical but what could change within companies (in general, not yours specifically)?

Here employers mentioned the possibility of large companies funding their own child care centers and smaller employers working together in groups to fund a child care center. Creating a consensus within the business to make these investments was cited as the largest barrier to implementation.

Post-COVID

As we emerge from the COVID experience, how do you see any of this changing just from that aspect?

The participants disagreed about whether employees will return to pre-pandemic child care plans, or if many will continue to work remotely or leave the labor force.

Concluding Remarks by Participants

Is there anything we haven't talked about yet today that you would like to discuss?

Both employers highlighted the disproportionate impact of child care on women, whether they are using child care or caring for their children full time. In addition, they reinforced the other discussion groups in saying that their employees often have a hard time finding care in general and finding care that matches their specific schedule and budget. This lack of availability and affordability have caused their staff to miss work, use vacation days, and even to drop out of the labor force.