

Childcare Baseline Inventory

JACKSON/TETON COUNTY, APRIL 2020



Produced by OPS Strategies for
Town of Jackson and Teton County, Wyoming

Table of Contents

Acknowledgments	2
Executive Summary	1
Background.....	3
Availability of ECE	5
Population Under 5 (Demand)	5
Certified ECE Capacity (Supply)	8
Future Availability of ECE	11
Affordability of ECE.....	14
Median Family Income (Demand)	14
Cost of ECE (Supply).....	16
Future Affordability of ECE	17
ECE Options	19
Schedule	19
Exempt ECE.....	20
Other ECE Characteristics.....	21
Appendix A: Family Survey	A-1
Appendix B: Provider Survey	B-1

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Executive Summary

Jackson and Teton County are interested in understanding the scale and scope of pre-Kindergarten childcare and early childhood education (collectively referred to as ECE). The study is based on federal, state, and school district data supplemented by a survey of families and providers in February 2020. The study is organized into three topical sections: Availability of ECE, Affordability of ECE, and ECE Options. Each section addresses demand, supply, and opportunities/threats. The key findings and opportunities from each section are summarized here.

OVERALL ECE PICTURE

The ECE issue in Teton County is a lack of affordable options. The quantity of ECE in the community is relatively high – there is WyDFS **certified capacity for 80%** of the Teton County population under the age of 5. However, ECE costs twice as much as families can afford – the average family is paying **15% of its income toward ECE**, where 7% is the federally recognized definition of ECE affordability.

ECE affordability is a structural, national issue, especially for infants and toddlers. To maintain the necessary 4:1 and 5:1 child:teacher ratios for young children, each family has to pay more than 7% of its income, or the teacher has to be paid lower wages. In other communities, the structural affordability can be balanced with other costs of living. In Teton County, all living costs are high, and there is no room for families to absorb the ECE affordability issue.

It is unlikely that ECE affordability alone is the cause, but there is a trending decline in the number of young families in the community. The number of births to Teton County mothers is in an unprecedented decline that is likely to continue because the number of women age 15-44 is also in decline. The last 15 years have seen record-high out-migration of families once they have a child and record-low in-migration of 25-35-year-olds who will have the next generation of children.

Income data indicates that the families leaving (or never coming) are those in the lower-middle class. While the median income for families with children has increased relative to community median income, the proportion of families in poverty, at the lowest end of the income spectrum, has remained the same.

The declining demand for ECE represents an opportunity to use existing ECE space to provide ECE to a greater portion of the population. The increasing divide in incomes and the cost of living in Teton County mean that addressing the structural unaffordability of ECE will require looking for new solutions.

There is an extensive body of research on the benefits and importance of ECE that this study does not review. The purpose of this report is not to recommend what the community should do. This report is a community snapshot of the current state of ECE to inform community decisions about what to do next.

AVAILABILITY OF ECE

Key Availability Findings

- In 2019 there was certified ECE capacity for 80% of children under age 5, compared to 58% in 2012.
- The population under 5 (ECE demand) is declining
 - The Teton County population under age 5 is in an unprecedented decline, down 15% since 2011.
 - Births to Teton County mothers were down to 224 in 2019, the lowest amount since 2002
 - The population of women age 15-44, who will have the next generation of babies, is likely to decline in the next 10 years due to a lack of Millennial migration to Teton County in their 20s and 30s.
 - The under-5 population decline has coincided with 3.4% job growth. Growing reliance on commuters dampens the ECE demand from job growth because commuters utilize ECE in their home towns.

- Certified capacity (supply) increasing
 - In 2019 there was a certified capacity of 915 children, compared to a 740 child capacity in 2012
 - 53% of capacity was provided in facilities subsidized by the public, a large business, or a church; meaning that continuation of the supply is more resilient to economic shocks such as COVID-19

Key Availability Opportunities

- Additional resources for noncertified providers, such as group activities and education opportunities.
- Utilize existing ECE space and space in businesses and institutional settings to meet the declining demand.

AFFORDABILITY OF ECE

Key Affordability Findings

- The average family pays 15% of its income toward ECE. The US Department of Health and Human Services defines affordability as ECE that costs no more than 7% of income.
- Median family income is increasing, but the lowest family incomes are not
 - The median income for families with children rose relative to the community median income
 - However, the percentage of the population in poverty seems to be consistent, indicating a growing gap between the lowest incomes and median income.
- ECE is structurally unaffordable
 - If a family is only paying 7% of its income for ECE, it takes 8 families to pay a teacher a median income.
 - Child:teacher ratios for safe, quality ECE vary from 4:1 for infants, to 8:1 for 2-year-olds, to 12:1 for 4 and 5-year-olds.
 - Teton County cost of living limits options for addressing the structural unaffordability.

Key Affordability Opportunities

- Continued collaboration among providers to share resources and reduce costs.
- Tuition assistance programs for working families.
- Support of ECE teachers to reduce their cost of living.

ECE OPTIONS

Key Options Findings

- 74% of families have ECE on the days of the week they desire, and 38% have the daily drop-off and pick-up schedule they want.
 - 84% of Teton County families with children have all parents in the workforce, compared to 71% nationally, decreasing schedule flexibility.
 - The schedule that is desired but not available is pre-7:30 drop-off and post-5:30 pick-up; however, extending the day for families also means extending the day for teachers.
- 21% of families were unable to find ECE in their desired location.
- 13-17% of families were unable to find ECE with their desired curriculum or qualifications.

Key Options Opportunities

- Coordinated early and aftercare options to support working family schedules without burning out ECE staff.
- Remove certification barriers for substitutes and other relief options for providers.
- Opportunities for exempt providers to bring children together for play and providers together for education.

Background

PURPOSE

In August 2019, the Town of Jackson and Teton County, Wyoming, released a request for proposals to complete a baseline inventory of the supply of and demand for childcare in the community. The focus of the study is the quantification of the supply and demand of childcare and early childcare education of various types. The study also identifies future opportunities and threats based on supply and demand projections. This study is not an evaluation of any particular provider or type of provider and does not make any curriculum-related findings or recommendations. As a result, the report refers to all types of childcare and early childhood education by the acronym ECE to avoid any distinction or valuation. This nomenclature matches the terminology being used in the current ECE Needs Assessment being completed by the State. How the study will be used will be determined in the future based on its findings. Jackson and Teton County seek to provide a baseline against which future efforts can be monitored, but anticipate that a variety of stakeholders will act on the study

ORGANIZATION

This report is organized into three topical sections: Availability of ECE, Affordability of ECE, and ECE Options. Each section addresses demand, supply, and opportunities/threats. The Executive Summary combines the key findings and opportunities from all three sections.

OTHER STUDIES

Past Studies

The most recent study of ECE provision was the 2012 Teton County Childcare Assessment completed by Susan Eriksen-Meier Consulting, LLC, and available on the Teton County website. The purpose of that study was to evaluate options for spending Special Purpose Excise Tax (SPET) dollars dedicated to providing ECE. The 2012 Assessment made supply and programmatic recommendations. Much of the pre-2012 data cited in this study is from the 2012 Assessment. The 2012 Assessment also references a childcare assessment completed in 2005.

Human Services Plan

Concurrently to this study, Jackson and Teton County are also funding a Human Services Plan to coordinate the funding of human services in the community. That Plan is looking at high-level coordination of service provision but is not getting into a detailed needs assessment of any particular service. Early phases of that project identified child care as a key human services issue. A draft of that report is scheduled for release in the Spring of 2020 as well.

State Needs Assessment

In 2020, Wyoming received a federal grant to complete an ECE Needs Assessment and Strategic Action Plan. Early stages of that effort are underway. A listening session was held in Jackson on March 9, 2020. Other listening sessions around the State were scheduled, and a survey was planned. However, COVID-19 responses have postponed events, and schedule adjustments for the Assessment have not been finalized.

METHODOLOGY

This study compares and contrasts trends from State, Federal, and Local School District data. That data is supplemented with surveys local parents and ECE providers that were in the field in February of 2020. Neither survey

has been weighted, and all respondents self-selected. The response demographics for each survey are compared to community demographics below to illustrate how representative the surveys were. The actual survey results are discussed through the body of the study. The complete survey responses are attached as appendices.

Family Survey Response Demographics

- 446 responses were submitted; there were 908 families with a child under 6 in 2018.¹
- 49% of responses had an income under the 2018 median income for families with children.²
- 2.5% of responses had an income below the poverty line; in 2018, 7.1% of the population was in poverty.³
- 14% of responses were Hispanic; 30% of the population under 5 is Hispanic.⁴
- 11% of responses were from commuters; 44% of the workforce commutes.⁵ (how many commuters have children under the age of 5 is not known)

Provider Survey Response Characteristics

- 37 responses were submitted.
- 18 of 31 certified providers were represented.
- The median capacity of certified providers who responded was 40 children, the median capacity of all certified providers is 20 children.

COVID-19

The data in this study were collected before the COVID-19 pandemic closed schools and ECE, and shocked the economy. The timing is invaluable as this study will provide a prior condition in analyzing the effects of COVID-19 on ECE. That said, this study does not attempt to project the impacts of COVID-19. This study is being released before the pandemic even reaches its peak. All projections made are based on prior conditions and trends, some of which may be irrelevant if the current public health and economic crises reset trendlines.

Finally, a special note of thanks to the public officials in the above acknowledgments who remained available for last-minute follow-up questions regarding this study, while managing a 100-year public health crisis. Their continued valuation of this project in the face of a pandemic can only serve to emphasize the importance of the topic.

¹ American Community Survey

² American Community Survey

³ American Community Survey

⁴ Wyoming Economic Analysis Division

⁵ 2020 Annual Indicator Report

Availability of ECE

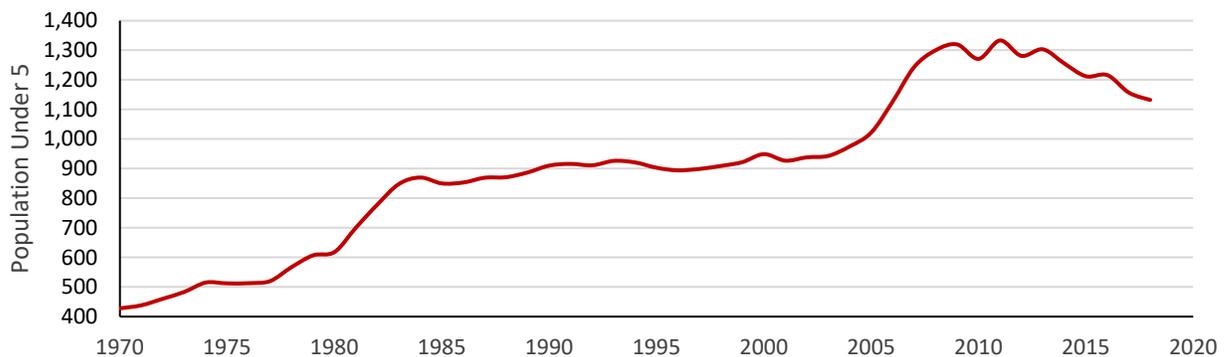
The availability of ECE is the percentage of the under-5 population for which there is certified ECE capacity. At the time of the 2012 Childcare Assessment, the Teton County availability was 58%. In 2019 it was about 80%. This Section of the Study looks at the two components of availability in more detail – the under-5 population (demand) and the certified ECE capacity (supply). At the end of this section is an additional discussion of the availability percentage and opportunities and threats to future availability.

Population Under 5 (Demand)

CURRENT DEMAND

The State of Wyoming Economic Analysis Division estimates that there were 1,132 children under the age of 5 in Teton County in 2018. Estimates for 2019 are not yet available. However, birth numbers would indicate that the 2019 population is likely to be similar to the 2018 population.

Population Under 5, Teton County, 1970-2018

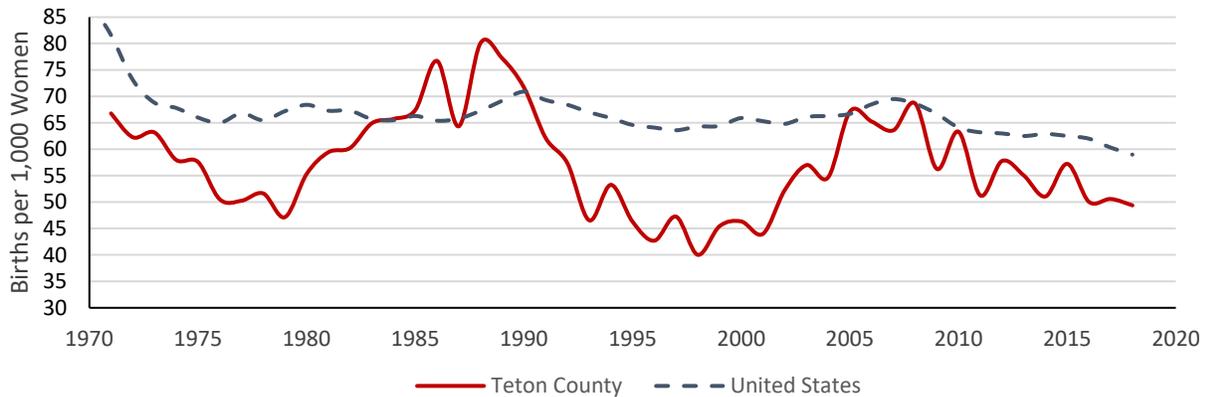


Source: Wyoming Economic Analysis Div.

The population under 5 was peaking around the time of the 2012 Childcare Assessment. Since its peak in 2011, the under-5 population has declined by 15%. The steep 2004-2008 increase in the under-5 population is not unprecedented. A similar increase occurred from 1977 to 1983. However, the decline that has followed the 2004-2008 increase is the first period of significant, multi-year decline in the State dataset, which goes back to 1969.

A baby-boom drove the spike in the under-5 population from 2004-2008. (The same baby-boom that is currently overflowing the Middle School.) The increase in the under-5 population was not accompanied by a similar increase in women age 15-44 that would indicate an in-migration of young families. Instead, the increase corresponded with an increase in birth rate from 44 births per 1,000 women age 15 to 44 in 2001 to 69 in 2008. The decline in births since 2011 is the result of a birth rate that has fallen back to 49 in 2018 and a population of women age 15-44 that is the same in 2018 as it was in 2013.

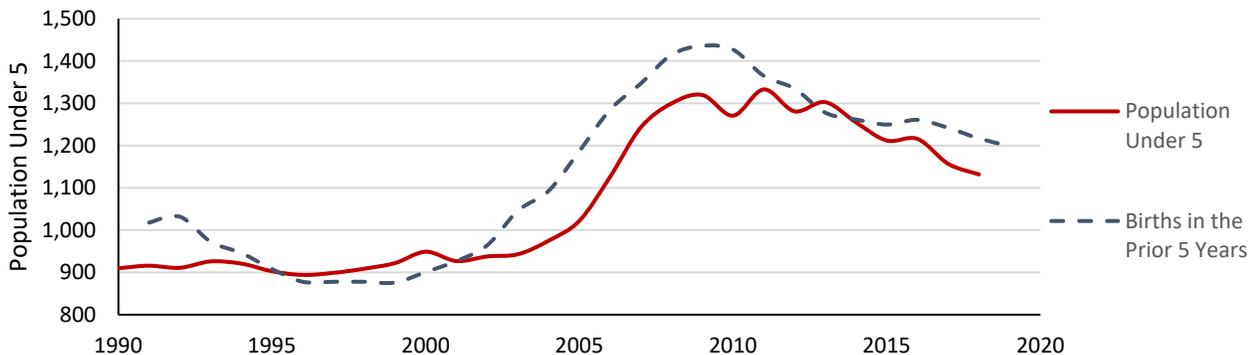
Births per 1,000 Women Age 15-44, Teton County and US, 1970-2018



Source: Wyoming Economic Analysis Div., Wyoming Dept. of Health, CDC

Not only was the increase not driven by an influx of young families, but it appears that young families actually left the community at a higher rate over the boom period. The chart below compares the under-5 population estimate to the sum of the number of births to Teton County mothers in the same year and 4 previous years. Where the lines are further apart, migration is having an impact on the under-5 population. On average, for the past 50 years, more young families leave the County than arrive - the actual population under 5 is most often below the sum of the births in the most recent 5 years. This out-migration of young families appears to have peaked in the boom and Recession of the 2000s – dampening the impact of the baby-boom. For comparison, the steep increase in the under-5 population in the early eighties was the product of a baby-boom compounded by in-migration rather than muted by out-migration. The gap has widened again over the past few years.

Population Under 5 and Births in the Prior 5 Years, Teton County, 1990-2018



Source: Wyoming Economic Analysis Div., Wyoming Dept. of Health

FUTURE DEMAND

The decline we've seen in the Teton County population under the age of 5 has no historical reference. However, the receding birth rate and loss of young families suggest the decline in demand for ECE is not about to rebound. Births to Teton County mothers were down again in 2019 to their lowest level (224)⁶ since 2002.

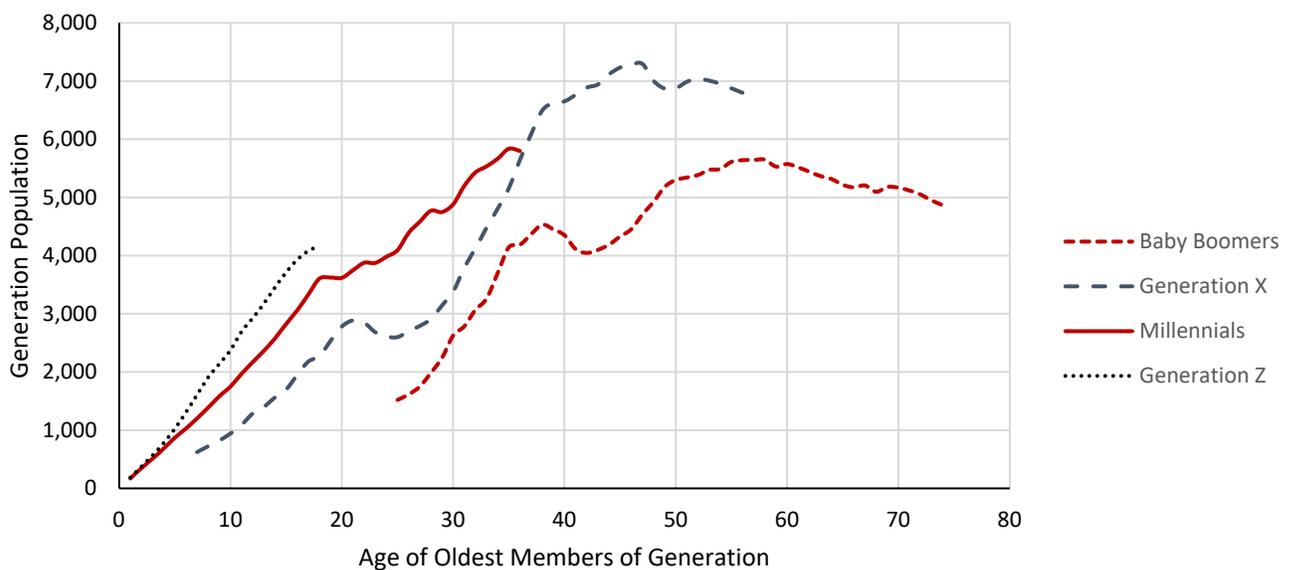
In addition, the generational demographics indicate that, for the first time, the birth rate of the next generation of Teton County children will be less than the birth rate of the generation before it (Generation Z born 2000-2019). The

⁶ Preliminary estimate as of 3/26/2020 from the Wyoming Dept. of Health

chart below shows the population in each generation by the age of its oldest members. Each Teton County generation has had two periods of increase: the natural increase from birth to age 20, then the in-migration increase in the generation's 20s and 30s. The in-migration increase is the popular community identity, "I came for a season, and never left." Except that it does not appear to be the reality for Millennials – who are going to have the majority of the next generation of Teton County babies. Millennials did not migrate to Teton County like Gen X or the Boomers, or if they did, they did not stay like the generations before them.

The lack of Millennials relative to prior generations will have numerous impacts on the community. It is relevant to ECE in that it ECE demand is likely to continue to decline before it levels out and unlikely to rebound back to 2011 levels. As the primary cohort of mothers shifts from Gen X to Millennials, there will be fewer mothers. We are still a few years away from a significant decrease in the number of women age 15-44, but without a surge of Millennial migration, the demographics indicate it is imminent. If the Millennial population tops out where it is, birth numbers over the next 20 years might be closer to those from 1980 to 2000 (average 188 births per year) than 2000 to today (average 250 per year).

Generational population by age of oldest members of the generation, Teton County



Source: Wyoming Economic Analysis Div.

ADDITIONAL DEMAND FROM CHILDREN OF COMMUTERS

Another source of demand for Teton County ECE is the children of the commuting workforce. The Town of Jackson and Teton County estimate that in 2018 about 7,900 commuters were working in Teton County each day.⁷ However, not all commuters have families, and the families with commuters often have a parent who does not commute. Of the families that responded to the family survey, only 5% were commuters who utilized Teton County ECE.

Another way to estimate the demand from commuters is to look at the number of working families in the communities nearest to Teton County that are most likely to bring children to ECE in Teton County. Based on American Community Survey population data (collected annually by the US Census Bureau) and Census Bureau commuter estimates, the demand for Teton County ECE from Driggs, Victor, and Alpine area children is about 190 children or an additional 17% on top of the Teton County, Wyoming population under 5.

⁷ 2020 Annual Indicator Report

The decline in the Teton County population under 5 is during a time of 3.4%⁸ annual job growth. This means that the new jobs created have been filled by non-parents, who do not stay in the community to have children, or by commuting working parents. The percentage of the Teton County workforce that commutes has begun to increase again after a period from 2013 to 2016, where the percentage was relatively flat.⁹ An increase in commuting parents may come with an increased demand for Teton County ECE that serves commuting families. However, the extent of the increased demand will depend on how ECE is provided in neighboring communities because some commuting families utilize ECE in their home community.

The remainder of this analysis will focus on Teton County, Wyoming households. Still, it is worth noting that 5-15% of the current gross ECE demand is coming from outside Teton County, Wyoming and that that percentage is likely to increase, at least somewhat. Teton County's ECE role relative to neighboring communities is a complex regional policy question that touches on the vision neighboring communities have for themselves and Teton County's policy not to export its impacts. More tangibly, having an increasing portion of the ECE demand come from commuters will change the characteristics of the ECE demanded. As discussed later in this report, pick-up and drop-off hours are already a stress point and might be even more so for commuters.

ETHNICITY

In 2018, about 30% of the population under 5 was Hispanic¹⁰, a percentage slightly higher than the 10-year average. This percentage is consistent with the demographics of the Teton County School District #1 Kindergarten classes of the past few years. The percentage of the under-5 population that is Hispanic is much higher than the percentage of the overall population that is Hispanic. This means that Hispanic households are more likely to be families than the population as a whole. That nearly a third of ECE students are Hispanic is significant in terms of the characteristics of the ECE demanded. Resources will continue to be needed to assist this large segment of the population to access the ECE that is available in overcoming language and cultural barriers.

Certified ECE Capacity (Supply)

Wyoming State Statute 14-4-102 requires certification with the Wyoming Department of Family Services (WyDFS) for all ECE providers except those listed below. Providers exempt from certification are:

- A parent or legal relative;
- A neighbor or friend if the childcare provider does not regularly engage in this activity;
- Parents exchanging child care on a mutually cooperative basis (e.g., a playdate);
- A person employed to come to the home of the child's parent or guardian (e.g., a nanny);
- Those providing care for less than 3 minors;
- Foster homes supervised by the state;
- Local government, school district, or agency or political subdivision of the state;
- Summer camps operated by nonprofit organizations;
- Ranches or farms not offering services to children who are homeless, delinquent or have an intellectual disability; and
- Day-care facilities providing care to the children of only one (1) immediate family unit.

⁸ 2020 Annual Indicator Report

⁹ 2020 Annual Indicator Report

¹⁰ Wyoming Economic Analysis Division

CERTIFIED PROVIDERS

In 2019, Teton County had 31 certified providers with license capacity for 915 children. The number of certified providers has grown from 25 in 2012 when the last Childcare Assessment was completed. Similarly, the amount of capacity has increased from a capacity of 740 children in 2012. It should be noted that the certified capacity is the maximum number. Some programs are not full-day. The total capacity includes some for-profit summer camps and drop-in only facilities. However, these categorizations have not changed since 2012, so the growth that has occurred is an apples-to-apples comparison.

Twenty (20) of the 31 providers certified in 2019 were also certified in 2012. Eleven (11) of the 2019 providers have become certified since 2012, with 4 of the new providers certified for the first time in 2019. Five (5) providers that existed in 2012 are no longer certified. And another 2 providers both opened and closed in the past 7 years. Some of the new providers are the result of work done by WyDFS with uncertified providers to help them become certified. This work did not add effective capacity, but it did bring more of the capacity in the community up to state standards.

Of the 18 certified providers who replied to the provider survey, 4 had decreased capacity, and 4 had increased capacity since 2012.

Many of the survey responses regarding capacity changes, or lack thereof, cited space as a limiting factor. Providers also cited staffing and growing costs as reasons for decreased capacity. Two (2) of the 4 respondents that have increased capacity are large employers responding to the demands of their employees – and for whom space is an issue with more solutions.

Certified Providers, Teton County, 2012-2019

Year	Certified Providers	Capacity
2012	25	740
2013	25	745
2014	25	767
2015	27	787
2016	31	861
2017	30	860
2018	29	788
2019	31	915

Source: Wyoming Dept. Family Services

SIZE OF CERTIFIED FACILITIES

WyDFS further classifies certified providers into 3 categories.

- Family Child Care Home (FCCH)
 - Maximum capacity of 10 children (including the provider's children under the age of 6)
 - Located in a home
- Family Child Care Center (FCCC)
 - Maximum capacity of 15 children (including the provider's children under the age of 6 if the FCCC is located in the provider's home)
 - Can be located in a home or as a separate facility
- Child Care Center (CCC)
 - Capacity base on size
 - Must be a separate facility, cannot be in a home

The growth in capacity has been in Child Care Centers (CCCs). In 2012 there were only 14 certified CCCs. In 2019, there were 22 CCCs. The new CCCs are smaller than the established facilities. The average CCC capacity has fallen from 45 children in 2012 to 38 children in 2019. The new CCCs opened in the past few years have had a capacity of 25 children or less.

Conversely, there has been a decline in Family Child Care Home (FCCH) facilities. In 2012 there were 7 FCCHs; in 2019, there were 5. The loss of FCCHs includes 1 FCCH that transitioned into a CCC, 3 that have closed, 1 that has opened

and closed, and 2 that have recently opened. Based on interviews, it is not uncommon for a mother to open an FCCH when her child(ren) needs care, then close when her child(ren) begins school. The certification data also hints at this phenomenon.

There has been 1 provider who grew from an FCCH to a CCC, 1 provider that grew from an FCCH to an FCCC, and 3 providers that grew from FCCC to CCC (1 of which is a summer camp).

Certified Providers by Certification Type, Teton County, 2012-2019

Cert. Year	FCCH		FCCC		CCC	
	Providers	Capacity	Providers	Capacity	Providers	Capacity
2012	7	70	4	41	14	629
2013	7	70	4	46	14	629
2014	6	60	4	46	15	661
2015	7	70	5	50	15	667
2016	8	80	3	25	20	756
2017	7	70	4	40	19	750
2018	5	50	5	65	19	673
2019	5	50	4	40	22	825

Source: Wyoming Dept. Family Services

CERTIFIED INFANT CARE

By far, the bulk of the child capacity is in CCCs, and it was primarily the CCCs that responded to the provider survey. Seventeen (17) of the 31 certified providers responded to the survey, representing 711 of the 915 certified ECE spaces. In addition, St. John’s Health Child Care responded as a “Licensed Facility” with capacity for 80 children based on state standards. (While St. John’s Health Child Care is exempt from state certification, it was included with the other certified providers in reviewing the survey data.) Only 3 providers with a capacity of 15 or less responded to the survey. The median capacity of a survey respondent was 37 children. As a result, the survey responses are most representative of CCCs.

Age of Children in Care on an Average Day, Teton County, 2020

Age	Total Children		Providers	Avg. Children per Provider
Less than 1 year	80	9%	9	8.9
Age 1	103	12%	9	11.4
Age 2	162	19%	12	13.5
Age 3	214	25%	16	13.4
Age 4	207	24%	15	13.8
Age 5	94	11%	14	6.7

Source: 2020 Provider Survey

About 60% of the children enrolled with surveyed providers are preschoolers – age 3-5. Fifteen (15) of the 18 respondents serve 4-year-olds, while only 9 take children under the age of 2. With an equal number of births each year, the preschool population would make up 40%-50% of the children in ECE, so the 60% makeup would indicate that preschoolers are more likely to be in certified care than infants and toddlers. TCSD #1 Kindergarten data from the

past two years supports the finding that the percentage of preschoolers in certified care is higher than the percentage of infants and toddlers. Still, the School District data would indicate a less stark contrast than the provider survey.

The survey response also indicates that the percentage of children in certified care increases with each year of age from 0 to 3. Parent choice and parental leave benefits might contribute to a decreased demand for ECE in the first year. But, the increasing enrollment in ECE also correlates with the increasing child:staff ratios for ECE providers, which are discussed in more detail in the affordability section below.

It may be that the smaller providers who did not respond to the survey are the ones providing infant and toddler care because smaller classrooms with lower child-to-provider ratios are functionally and regulatorily required for younger children. Smaller facilities can meet these needs easier than they can meet the space needs of older children. That said, home facilities can only take 2 infants, and incorporating infants into multi-age groups is difficult. Infants require greater one-on-one attention and are difficult to integrate into a group of older children because it limits what the

older children can do. Correspondingly, infants tend to have their own groups. The lack of response from smaller providers and the School District data likely suggest a higher toddler capacity, but may not suggest a higher infant capacity

FUTURE CERTIFIED SUPPLY

As discussed above, 20 of the 31 providers certified in 2019 were also certified in 2012, indicating that a significant portion of the current supply is well established and likely to remain. These 20 providers represent 77% of the certified capacity. Of the certified providers that responded to the survey, half have been in business for at least 11 years, with an average business age of 15 years. (CLC's 48 years in operation pulls up the average significantly.).

Two of the certified providers who responded to the survey were "not sure" if they intended to enroll new students after the current enrollment is grown. One was a smaller provider with a capacity of 10, the other a midsize provider with a capacity of 17. In addition to these survey responses, some of the existing ECE businesses will likely close as the directors of the businesses retire or move on. It is typical for an ECE business to retire with its director rather than continue. Although, there some ECE spaces that are inhabited by a new ECE business when vacated by another.

The most resilient ECE supply is the supply provided by the community's large employers and churches, and by Children's Learning Center (CLC). These providers account for about 53% of the ECE capacity in the community. Teton County School District, St. John's Health, and Jackson Hole Mountain Resort all provide ECE to their employees at a subsidized rate. The Presbyterian Church and Episcopal Church each have ECE facilities on their campuses. These ECE facilities are likely to continue beyond the careers of the current director and employees because the motivation for keeping the facilities open is larger than the ECE business itself.

Home facilities seem to be most vulnerable to disappearance. As discussed above, the number of home providers has declined, and home care is more prone to a shorter business life than an ECE in a dedicated business space. The current lack of home care may be merely a low point in a cycle because home care offers a provider cost advantages. However, home ECE has challenges as well. Home care can be isolating for a single provider, and providers have found they are treated less professionally in a home setting than in a center setting. Other issues are more specific to Teton County. Given the cost of housing, many working families rent and need permission from landlords to open a daycare. Other families can only afford to own a home because they already have jobs or can afford ECE. More recently, home facilities now need a state fire inspection for their license because of local interpretation that all ECE must be in a sprinklered building. Retroactively adding a sprinkler system within an existing home is cost-prohibitive to opening an ECE facility, and only homes of 5,000 square feet or more are required to have sprinklers.

The data and opinions reported in this study were gathered before the closure of ECE facilities due to the COVID-19 pandemic. What effect the pandemic will have on ECE supply remains to be seen. Will the newer facilities be able to float their costs, which likely include start-up costs that the more established facilities have already covered? Will providers have employees to reopen when they can reopen? The good news regarding the timing of this report is that it is a snapshot of where the community was right before the COVID-19 pandemic. It can be compared to the State Needs Assessment and other data collected during and after the pandemic to get a clear picture of the effects of the pandemic.

Future Availability of ECE

The 2012 Teton County Childcare Assessment reported an ECE availability rate (certified capacity divided by population under the age of 5) of 58%. Assuming the 2019 population under the age of 5 is not very different from what it was in 2018, the availability rate in 2019 was about 80% - the highest point in the last 15 years. The increase is

due to the combination of decreased demand - declining under-5 population; and increased supply - a 122-space increase in certified capacity from 2018 to 2019.

While neither the demand or supply inputs are perfect, the same data inputs were used in 2012 and 2019. If the demand data is adjusted for commuter demand by increasing the under-5 population by 15%, the 2019 availability ratio was still about 70%. On the supply side, the certified capacity does not include the 80-child capacity of St. John’s Health Child Care because that facility is exempt from state certification. Adding 80 spaces of capacity would increase availability to 87% for Teton County children and 75% for Teton County plus commuters. The supply input could also be reduced to account for summer only and drop-in only capacity, but such capacity exists in the 2012 and 2019 numbers.

ECE Availability Rate, Teton County, 2012-2019

Year	Certified Capacity	Population Under 5	Availability Rate	Births to Teton County Mothers
2012	740	1,281	58%	256
2013	745	1,303	57%	255
2014	767	1,255	61%	242
2015	787	1,212	65%	271
2016	861	1,216	71%	237
2017	860	1,157	74%	237
2018	788	1,132	70%	230
2019	915		(est.) 80%	224

Source: Wyo. Dept. Family Services, Economic Analysis Div., Dept. of Health

Note: 2012 Assessment used a 2012 capacity of 745 and population of 1,283

The availability rate was surprisingly high to reviewers of drafts of this study, but it is supported by the results from the family survey and TCSD #1 data. Seventy-six percent (76%) of families say they have certified care, indicating that the maximum capacity might not be fully available or utilized but that the number is not wildly high. TCSD #1 data for the last two years indicates that 90% of Kindergarteners attended preschool, and about 75% attended a certified preschool – with St. John’s Health Child Care accounting for the vast majority of the difference. The TCSD #1 numbers also support the results of the provider survey that preschool availability is higher than toddler and infant availability, but not tremendously so. If there were a larger discrepancy in availability by age, the overall availability ratio would be much lower than the ratio of Kindergarteners who attended preschool.

OPPORTUNITIES FOR AVAILABILITY

The projected decline in the population under 5 provides an opportunity over the next generation to fill existing ECE capacity with a higher percentage of the community’s children if the affordability and options discussed below can be addressed. While there is any number of concerns the community might have over the trending decline in children and young families, it can also be an ECE opportunity.

Another opportunity is in the continued collaboration between providers. In the past, ECE provision was characterized by competition. Competition still exists, but providers, officials, and organizers applaud the current collaboration between providers as a way to cut costs and provide support to the entire community. Suggestions for furthering this collaboration include supporting a network of smaller providers that have access to a larger pool of resources.

THREATS TO CERTIFIED CAPACITY

Survey responses consistently cite costs, staffing concerns, and lack of space as the challenges/barriers/threats to the future of ECE supply. Costs are analyzed in the Affordability of ECE section below.

Staffing

Funding is at the core of staffing challenges and leads to turnover and difficulty finding qualified full-time and substitute staff. Based on interviews, many ECE staff are young. Many do not last in the profession, and others do not

last in the community. Many of the providers who responded to the survey stated that typical teaching positions turn over every couple of years. Another staffing challenge mentioned by multiple survey responses is burnout of staff and difficulty in finding substitutes when needed.

One of the barriers to hiring and finding substitutes is the current certification process with the State. The process includes necessary background, health, and qualification checks that ensure the safety of the children. However, the current fingerprinting process has to be done by mail and runs with the facility. This means that the process can take up to 6 weeks, which can delay a start date and lead a potential employee to take another job. It also means that a substitute needs separate fingerprint verification for every provider. WyDFS is aware of the issue and looking into ways to streamline the process through electronic submittal and a central repository for the information. One of the outcomes of COVID-19 is that WyDFS is testing its ability to use a central repository to get out-of-work teachers who have been previously screened back to work when ECEs reopen.

Space

Finding space in Teton County is not a barrier unique to ECE. However, ECE has some unique requirements, especially as home care becomes more difficult. Commercial space accompanied by the requisite outdoor floor area to operate an ECE is rare. We are blessed with many outdoor recreation and learning opportunities that many of the providers use to full advantage. However, WyDFS requires a certain amount of fenced-in outdoor space near the facility, which can be hard when local codes limit options to commercial zoning. A local allowance to relieve this pressure slightly is the allowance of ECE in the Business Park zone otherwise reserved for industrial uses. Rents and competition in the BP zone are lower than in other zones. The tradeoff is that surrounding uses are not always compatible with ECE, an observation made in multiple family survey responses.

An opportunity with regard to space is the utilization of space in large businesses and institutional settings where ECE tuition does not have to cover the cost of the space. Some employers and community institutions are already doing this. There are likely other spaces that could be similarly utilized.

AVAILABILITY OF ECE SUMMARY

Key Availability Findings

- In 2019 there was certified ECE capacity for 80% of children under age 5, compared to 58% in 2012.
- The population under 5 (ECE demand) is declining
 - The Teton County population under age 5 is in an unprecedented decline, down 15% since 2011.
 - Births to Teton County mothers were down to 224 in 2019, the lowest amount since 2002
 - The population of women age 15-44, who will have the next generation of babies, is likely to decline in the next 10 years due to a lack of Millennial migration to Teton County in their 20s and 30s.
 - The under-5 population decline has coincided with 3.4% job growth. Growing reliance on commuters dampens the ECE demand from job growth because commuters utilize ECE in their home towns.
- Certified capacity (supply) increasing
 - In 2019 there was a certified capacity of 915 children, compared to a 740 child capacity in 2012
 - 53% of capacity was provided in facilities subsidized by the public, a large business, or a church; meaning that continuation of the supply is more resilient to economic shocks such as COVID-19

Key Availability Opportunities

- Additional resources for noncertified providers, such as group activities and education opportunities.
- Utilize existing ECE space and space in businesses and institutional settings to meet the declining demand.

Affordability of ECE

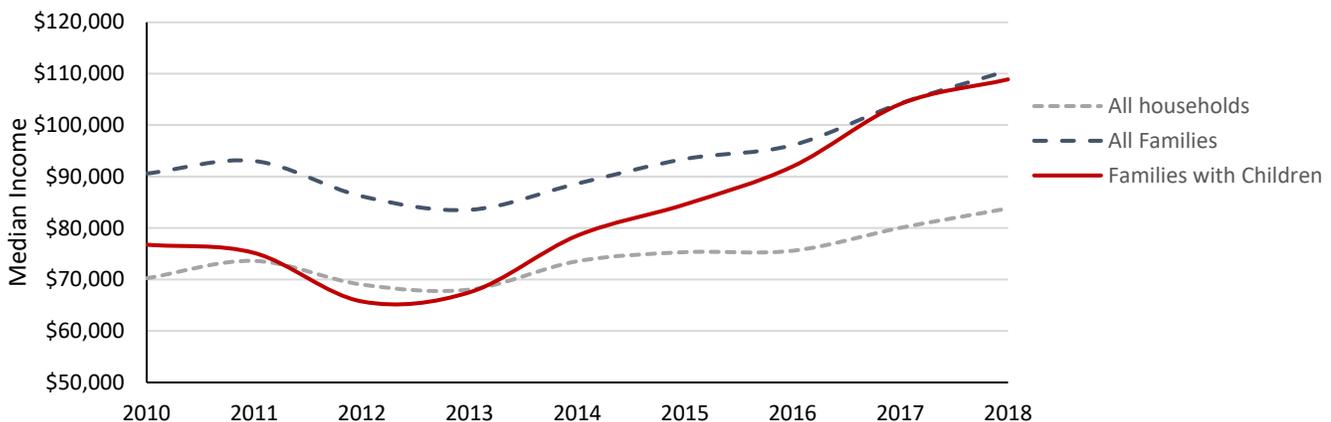
According to the U.S. Department of Health and Human Services (HHS), ECE is affordable if it costs families no more than 7% of their income. According to the family survey, the average Teton County family is spending 15% of their income on ECE. This section looks at the two components of ECE affordability – family income (demand), and ECE cost (supply). The final subsection looks at the affordability in more detail and the opportunities and threats to ECE affordability.

Median Family Income (Demand)

The 2018 median income of a Teton County family with children under the age of 18 was \$108,897, according to the American Community Survey (data for families with children under the age of 5 is not available). A family with median income and 1 child can afford ECE tuition of \$152 per week, or \$31 per day, according to the HHS standard.

The median income for families with children is on the rise. The median income for families with children was tracking with the household median income from 2010 through 2013. Since 2013, the median income for families with children jumped from tracking with the household median income to tracking with the family median income. What this jump means is that families with children have gone from being squarely middle class to being clustered in the upper-middle class. As discussed below, this does not indicate a reduction in low-income families, but it may mean that it was the lower-middle-income families with children are the ones that left during the baby-boom of the 2000s. It may also be an indication that in the reduced migration of Millennials, only the wealthier stayed in the community. A final potential explanation is that it is not a real-world trend but a statistical anomaly based on an under-count of low-income families, which is an explanation that has support from the poverty data discussed below.

Median Income by household type, Teton County, 2010-2018



Source: American Community Survey

LOW INCOME (POVERTY)

Poverty is a federally defined level of income and is used as a qualifying criterion for many federally funded social assistance programs. As a result, it is a level of income that is reported, allowing for an understanding of the lowest income segment of the population. In 2018 the poverty line was at about 30% of national median family income but only 17% of Teton County median family income. While many federal programs serve families making 130% of the poverty limit, that still only represents families earning 22% of median income. This means that wages are higher in Teton County than elsewhere in the nation. It also means that in a County with high wages, but an even higher cost of

living, a smaller percentage of the population has access to federal assistance. As the gap between Teton County's median income and the federal poverty level widens, it will be harder and harder for the lowest income members of the community to afford ECE and other services.

Census data indicates that a decreasing percentage of the under-5 population is living below the poverty line; however, local data does not agree with the federally reported trend. The American Community Survey began including the under-5 population as a subcategory in its poverty reporting for Teton County in 2015. In the 4-years that it has reported the figure, the percentage of under-5 children living in poverty has gone from mirroring the overall poverty rate in Teton County (average 7.6% of the population) to dipping far below the community poverty rate. In 2018 the ACS reported 2.2% of the under-5 population was in poverty. However, the dip is unlikely to represent a positive community trend. The margin of error for the under-5 poverty rate in 2017 and 2018 includes the possibility that it is still tracking with the overall poverty rate. Local data also refutes the decline in childhood poverty.

If there were truly a decline in child poverty, there would also be a decline in enrollment in the Head Start and Early Head Start programs that follow federal poverty limits. Such a decline has not occurred. Head Start (preschool age) and Early Head Start (infants and toddlers) have a capacity for 88 families total. In 2019, the programs were full, and there was a 20 to 60 family waitlist. If only 2.2% of the under-5 population were in poverty, the expected maximum enrollment in Head Start and Early Head Start would be 45 children. If 7.1% of the under-5 population were in poverty (the overall poverty rate), the expected maximum enrollment would be 145 – in line with actual enrollment.

Similarly, the number of Kindergarteners enrolled in the TCSD #1 Free or Reduced lunch program¹¹ has grown from 20 Kindergarteners in 2016, to 36 in 2019 (TCSD #1). The 2019 Kindergarten Free or Reduced Lunch enrollment (36 students) exceeded the ACS estimate for the entire under-5 population below the poverty line in 2018 (25).

The Hispanic population is more likely to be poor than the population as a whole. The poverty data for children under the age of 5 is not provided by ethnicity, but the Hispanic population is about 2.5 times more likely than the population as a whole to be in poverty.¹²

As the median income of families with children increases, understanding the percentage of the population that remains below the federal poverty line becomes especially important to the ECE affordability discussion. If 7% of the community and its children remain below the federal poverty line, even as that line gets further from Teton County's cost of living, ECE affordability will become an increasing issue. The gap between those in poverty and those making near median income also represents a growing range of incomes that cannot access federal assistance but cannot afford increasing living costs.

COST OF LIVING

The median family income and poverty data indicate that middle-class families with children are making more money, but there are still the same proportion of families with children that are in poverty. It makes sense that the wealthier middle-class families are the ones who stay and raise children because they can stretch to afford the cost of living. It is the lower-middle class that cannot afford the cost of living, does not qualify for federal assistance, but has enough mobility to leave the community.

None of the long-term economic indicators suggest these trends will decrease. Wealth in the community is growing much faster than the wages. Per capita income is growing at 2.7% annually¹³, while the median income is only growing at

¹¹ Free or Reduced lunch is available for children in households making up to 130% of the federal poverty level.

¹² American Community Survey

¹³ Jackson/Teton County Comprehensive Plan, Public Release Draft, March 20, 2020, pg. AV-9

0.9% annual rate.¹⁴ The wealth is driving up land values and the cost of services, while wages have not kept up. Median rent, which used to be affordable to houses making less than the median income, is now in line with median income.¹⁵ The median 2019 home sale was only affordable to a family making 3 times the median income.¹⁶ The natural beauty, state tax benefits, airport access, and increasing technology make it unlikely that community wealth will subside. They also mean that the lowest-wage workers will continue to be needed in the service industries that support the tourism and luxury residence economy.

The overall cost of living impacts ECE affordability because working families in Teton County do not have margins to absorb unaffordable ECE. As discussed below, the ECE affordability math is difficult in any community. In communities with lower costs of living, families might have a little room to budge, in Teton County families are already stretched to the max financially.

Cost of ECE (Supply)

As discussed at the beginning of the Section, a family with median income and 1 child can afford ECE tuition of \$152 per week, or \$31 per day, according to the HHS standard. A family with 2 children in care can afford \$76 per week tuition per child if there is no discount for multiple children. The lowest rate reported in the provider survey was \$52 per day – 168% of what is affordable to the median family income and in line with the survey response that families are spending 15% of their income on ECE.

COST OF THE PROVIDER RATIOS

While the cost of ECE is a huge concern for families, it is also a primary concern of providers. Making an ECE business work financially was the most commonly cited barrier, challenge, and threat for providers responding to the survey. One of the challenges identified by both families and providers is the need to pay ECE providers a living wage. However, when the family affordability standard of 7% of income is applied to the maximum child/staff ratios it is mathematically very difficult to pay providers the median income. Even before accounting for supplies, business expenses, staff benefits, or rent for the ECE space (let alone profit), the ratios make ECE a difficult economic prospect. The ECE ratios provide safety, and this study does not recommend a sacrifice in the safety or quality of ECE.

If a family with median income is only paying 7% of its income toward ECE, that means 8 families are needed to support median income wages for the ECE provider.¹⁷ Therefore, a preschool provider can charge affordable rates, pay median wages, and afford business expenses. For ages 2 and under, even with no rent, tradeoffs have to be made. Families have to be charged more, or staff paid less. Affordable rates and median income do not pencil for infant and toddler care.

Child:Staff Ratios, Affordability, and WyDFS Rules

Child Age	Child:Staff Ratio
Affordable Rate & Median Wage	8:1
Age <1	4:1
Age 1	5:1
Age 2	8:1
Age 3	10:1
Age 4	12:1

Source: Wyo. Dept. Family Services

If families of young children only want ECE a few days a week, the family cost can be distributed to make the provider cost work. However, working families must make other sacrifices to accommodate such a schedule, and are often

¹⁴ 2020 Annual Indicator Report

¹⁵ Wyoming Economic Analysis Division, American Community Survey

¹⁶ 2020 Annual Indicator Report

¹⁷ A fulltime childcare provider who is part of a 1.8 income household needs to make 56% of median income. If a median income household can pay 7% of median income, it takes 8 median income household to affordably cover the providers wages (7% * 8 = 56%)

economically driven to reduce the number of days in care, rather than choosing the reduction. Eighty-one percent (81%) of survey responses said their ideal schedule was 5 days a week of ECE. Only 67% of responses actually have 5 days a week of ECE.

Some providers have varying rates by age. Some providers with all age ranges subsidize younger student costs with older student rates so that a single rate is used for all age levels. However, one of the most significant cost reductions is a rent subsidy. Of the 31 certified providers, at least 17 have no rent or subsidized rent. Some of these providers occupy publicly owned buildings, and others are part of larger businesses or campuses with broader business plans that do not require the ECE tuition to cover all costs. Included in the 17 are the at-home ECE providers. Provider survey responses were similar, with 6 of 11 responses reporting a rent or company subsidy. Providers also reported receiving donations and charging programs specific fees.

Future Affordability of ECE

The family survey asked families about the percentage of their income they paid to ECE per child. The median response was 9%. When taking into account families with multiple pre-Kindergarten children, the average family is paying 15% of its income for ECE. Only 29% of survey responders were paying less than 7% of their income on ECE. While the survey response is not weighted, the affordability data is supported by the rates reported by providers relative to median income. Also, the survey was reasonably representative of the income characteristics of the community, except that it slightly under-represents the poorest families in the community. About 2.5% of survey responses came from families that reported an annual income below the poverty line. About 49% of responses came from families that reported an annual income below the family median income.

The market relationship between ECE affordability and employee wages is a give and take. Child:staff ratios are in place to provide safe, quality care. The economic realities of the ratios are not a reason to change the ratios, but they do mean that affordability will continue to be an issue. In any community, the child:staff ratios make affordable ECE that pays a living wage a mathematical challenge. In Teton County, where all aspects of cost of living are high, the issues are magnified.

OPPORTUNITIES FOR ECE AFFORDABILITY

The opportunities related to ECE affordability are in limiting non-wage costs. At home ECE and ECE supported by a larger business or community interest limit a large expense – rent. Jackson Hole Childcare Helpers, a non-profit that provides capital investment support to ECE, is another resource. As the community, looking for space that is supported by other financial means so that the ECE cash flow can be focused on the affordability ratio will be the key is examining future capacity options.

Another opportunity to address affordability is through local tuition assistance. Because of the incomes and ECE rates in Teton County, federal and state tuition assistance is limited. However, providers are willing to participate in tuition subsidy programs. Half of the providers who responded to the survey stated that they accept tuition subsidies from the State. The problem is that only the poorest families qualify for the federal programs administered by the state. With Teton County families stretched in all aspects of cost of living, many families do not qualify for currently available assistance, but are spending twice as much on ECE as they can afford. Twenty percent (20%) of families stated they sought financial assistance but were unable to find it.

Affordability can also be addressed on the other side of the equation. By reducing the cost of living for ECE providers, less cost has to be passed on to families through the affordability balance. Housing programs already exist that could be modified to support ECE providers. Other means of support could also be explored.

THREATS TO ECE AFFORDABILITY

The biggest threat posed by the ECE affordability is that the overall cost of living in the community continues to escalate. The ECE affordability threat is most acute for lower-income families. The lower-middle-class families that are stretched but do not qualify for federal assistance might already be moving, increasing the median income by subtraction, rather than lifting the economic situation of the poorest people in the community. If these trends continue, ECE will become characterized by wealthy families that can stretch to bridge the affordability ratio and families near or below the poverty line that cannot.

AFFORDABILITY OF ECE SUMMARY

Key Affordability Findings

- The average family pays 15% of its income toward ECE. The US Department of Health and Human Services defines affordability as ECE that costs no more than 7% of income.
- Median family income is increasing, but the lowest family incomes are not
 - The median income for families with children rose relative to the community median income
 - However, the percentage of the population in poverty seems to be consistent, indicating a growing gap between the lowest incomes and median income.
- ECE is structurally unaffordable
 - If a family is only paying 7% of its income for ECE, it takes 8 families to pay a teacher a median income.
 - Child:teacher ratios for safe, quality ECE vary from 4:1 for infants, to 8:1 for 2-year-olds, to 12:1 for 4 and 5-year-olds.
 - Teton County cost of living limits options for addressing the structural unaffordability.

Key Affordability Opportunities

- Continued collaboration among providers to share resources and reduce costs.
- Tuition assistance programs for working families.
- Support of ECE teachers to reduce their cost of living.

ECE Options

Options in ECE does not have a standard comparative metric like availability and affordability. However, in Teton County, there is a common challenge beyond affordability – schedule. The most common characteristic families were unable to find (other than “Price”) was “Hours of operation.” Only 74% of families have been able to find care on all the days they want it, and only 38% have been able to find care with an ideal pick-up and drop-off schedule.

Beyond schedule, the survey also asked families about the other characteristics they look for in ECE. Location, specific curricula, provider qualifications, Spanish language skills, and outdoor activity were other characteristics families found lacking in their options.

Schedule

The survey asked families their ideal and actual ECE schedules. The responses explain why “availability” is such an often-used word in describing ECE challenges even though the availability statistic indicates a record high quantity of available care. Eighty-one percent (81%) of families are looking for ECE 5 days a week; only 67% of families actually have ECE 5 days a week. Overall, only 74% of families (represented by the diagonal of shaded cells in the table) have care on the days that they need it. Families under the diagonal line have less ECE than they want. Families above the diagonal line have more.

As mentioned above, some of the reduced schedules are related to price. Some families who cannot afford 5 days of care make other adjustments to their work and life schedules. Anecdotes include careers being put on hold and families not having time together because of work schedules that cannot overlap. The of schedule fit may also indicate that availability ratio is not the same on every day of the week. Four (4) of the licensed providers who responded to provider survey are only open 4 days per week.

Days per Week of ECE, Ideal vs. Actual, Teton County, 2020

Ideal	Actual							Total	
	1	2	3	4	5	6	7		
1	4	0	0	0	1	0	0	5	1%
2	0	1	0	1	0	0	0	2	1%
3	0	2	14	0	1	0	0	17	5%
4	0	2	5	8	1	1	0	17	5%
5	0	18	15	26	220	1	1	281	81%
6	0	0	2	1	7	4	1	15	4%
7	0	1	0	0	3	0	8	12	3%
Total	4	24	36	36	233	6	10		
	1%	7%	10%	10%	67%	2%	3%		74%

Source: 2020 Family Survey

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Where families are taking on one or two more days of care than they would like, it may be that their provider does not offer the schedule they want. Providers often have limits on the schedules they offer to avoid empty spaces. As discussed above, the margins are tight at maximum capacity. This may explain why it is difficult for families looking for 4 days of ECE.

DROP-OFF AND PICK-UP

Beyond the weekly schedule, the daily schedule puts stress on families. While 74% of families have ECE on their ideal days of the week, only 38% have ECE that matches their ideal days of the week and drop-off and pick-up schedules. The drop-off need that is not being met is the pre-7:30 drop-off. Fifteen percent (15%) of families desire a pre-7:30 am drop-off, while only 6% actually have one. The unmet need for a later pick-up is even greater, as is the gap between ideal and actual. Twenty percent (20%) of families desire a post-5:30 pm pick-up. Only 8% actually have one.

Many of the comments from families responding to the survey indicate that the additional time needed at the beginning and end of the day is only enough to be at work in time to open/close.

Work schedules are the most commonly cited conflict with the ECE schedule. Schedule conflicts compound affordability stress on families in two ways. First, lower-wage jobs often have less schedule flexibility than higher-paying jobs. As a result, the workers already facing the most financial stress regarding ECE are the workers who cannot adapt their work schedules to their ECE schedules. Second, ECE rate structures often include additional fees for early drop-off or late pick-up. These after-hour rates are likely included in families reported ECE costs, but pose a stark, “optional” tradeoff that is front of mind for many families.

From a provider standpoint, the schedule desires compound the difficulty of the affordability math. If it is hard to balance the math for one teacher to cover the child/staff ratio, it is impossible to make it work for two teachers. That means staying open from before 7:30 am to beyond 5:30 pm is a 10.5-hour day or longer for each teacher. Asking teachers to work 5 - 10s to make their income is not what families or providers have in mind when discussing a living wage. Multiple providers cited fatigue and staff burnout from this schedule as a challenge.

WAITLISTS

A derivative of the affordability and schedule issue is the waitlist. The average waitlist for providers that responded to the survey (11 answered waitlist question) is about 1.3 times capacity. “Waitlist” was also a commonly used term used by families describing challenges in finding care. Families often put their names on many lists, and their names remain on lists after they have found other care. The high availability rate indicates that the long waitlist may be more of an indication of a lack of affordability and schedule options rather than an actual lack of availability.

Exempt ECE

Supply of ECE can take many different forms. In popular culture, the ECE center or stay-at-home parent are most common. In reality, there are also many home ECE facilities, family/friend arrangements, and variations in every general category. The bulk of this study focuses on certified centers and home providers. However, there is any number of families, friends, and nannies providing exempt ECE. Several types of care are exempt from certification, such as care provided by family members, care for 1 or 2 children, and care for a single family. ECE also exists that should have certification, but does not. When WyDFS is alerted to such a situation it works with the provider to get certified or cease the operation.

According to the family survey, 20% of families utilize a grandparent or other close relative for care, 12% utilize a family friend or distant relative, and 15% utilize a nanny. Many of these exempt, or otherwise uncertified providers, are used in addition to licensed providers to fill schedule gaps and as a way to manage affordability. Only 12% of families use an ECE combination that does not include a certified provider.

Drop-off and Pick-up Times, Ideal vs. Actual, Monday-Friday

Child Age	Family Ideal	Family Actual
Drop-off before 7:30 am	15%	6%
Drop-off 7:30 am – 8:30 am	73%	74%
Drop-off after 8:30 am	12%	20%
Pick-up before 4:30 pm	11%	25%
Pick-up 4:30 pm – 5:30 pm	70%	67%
Pick-up after 5:30 pm	20%	8%

Source: 2020 Family Survey

What type of ECE do/did you utilize?

	Count	% of Total
Licensed facility	315	76%
Grandparent or other close relative	84	20%
Family friend or distant relative	50	12%
Nanny	60	15%
Have not yet secured any ECE	46	11%
Total	412	

Source: 2020 Family Survey

Hispanic responders to the survey were more likely to use uncertified ECE, and accounted for half of the families utilizing a family friend or distant relative. The lower-income and higher poverty rate in the Hispanic community are likely part of the explanation. Language and cultural barriers are also factors. As would be expected, Spanish language was an important characteristic sought by Hispanic families. Forty-four percent (44%) of providers speak Spanish in the classroom.

The response to the provider survey from uncertified providers was minimal. Two (2) grandparents and 8 stay at home parents responded to the provider survey. Their responses echoed the availability and affordability concerns of the families and other providers. They also identified any opportunity around occasional times for exempt providers to come together for play and provider education. Such programs exist in other communities.

Other ECE Characteristics

Location was cited by 21% of families as a characteristic of their ideal ECE they were unable to achieve. As discussed above, at least 61% of certified capacity is in the Town of Jackson, but that does not necessarily mean that it meets the locational desires of families or the providers that occupy the space.

Specific curriculum was cited by 17% of families as a characteristic of their ideal ECE they were unable to achieve. Another 13% cited provider qualifications as a lacking characteristic. The purpose of this study is to quantify, not evaluate, the various ECE options in the community. This study defers to the extensive body of literature and research on the benefits of the various forms of ECE. These responses are in line with the general sentiment that there is a lack of affordable options and that families feel like they have to take what they can get.

Which, if any, of the characteristics you sought in selecting ECE were you UNABLE to attain?

	Count	% of Total
Price	138	53%
Hours of operation	116	44%
Location	54	21%
Financial assistance opportunity	53	20%
Specific curriculum	45	17%
Provider qualifications	35	13%
Spanish-language skills	35	13%
Outdoor activity	33	13%
Family atmosphere	26	10%
English-language skills	12	5%
Total	261	

Source: 2020 Family Survey

ECE OPTIONS SUMMARY

Key Options Findings

- 74% of families have ECE on the days of the week they desire, and 38% have the daily drop-off and pick-up schedule they want.
 - 84% of Teton County families with children have all parents in the workforce, compared to 71% nationally, decreasing schedule flexibility.
 - The schedule that is desired but not available is pre-7:30 drop-off and post-5:30 pick-up; however, extending the day for families also means extending the day for teachers.
- 21% of families were unable to find ECE in their desired location.
- 13-17% of families were unable to find ECE with their desired curriculum or qualifications.

Key Options Opportunities

- Coordinated early and aftercare options to support working family schedules without burning out ECE staff.
- Remove certification barriers for substitutes and other relief options for providers.
- Opportunities for exempt providers to bring children together for play and providers together for education.

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Appendix A: Family Survey

Multiple Choice Questions

Q. Where do you live?

Town of Jackson	266
Elsewhere in Teton County, Wyoming	121
Jackson Hole	1
Rafter J	1
Wilson, WY	1
Wilson	1
Lincoln County, Wyoming	20
Sublette County	2
Teton County, Idaho	27
Rigby ID	1
<hr/>	
Total Response	441

Q. What is your family's ethnicity?

Non-Hispanic	332
White	7
Caucasian	6
Hispanic	61
Multiple ethnicities	31
<hr/>	
Total Response	437

Q. What is your family's annual income?

0-50% of Median Income	42
50-80% of Median Income	56
80-120% of Median Income	123
120-200% of Median Income	147
Over 200% of Median Income	27
<hr/>	
Total Response	395

Q. How many people in your family work full-time? (40 hours per week)

0	7
1	145
2	282
<hr/>	
Total Response	434

Q. How many people in your family work part-time? (Less than 40 hours per week)

0	259
1	120
2	7
<hr/>	
Total Response	386

Q. Where do the working members of your family work?

Town of Jackson	386
Elsewhere in Jackson Hole	132
Teton County, Idaho	17
Remote	13
Home	7
Lincoln County, Wyoming	5
California	3
Freelance	3
California	3
Teton Village	2
Sublette County	2
Pinedale	1
University of Wyoming	1
Fremont County, WY	1
Moose, WY	1
Kelly, Wy	1
Teton County, WY	1
Grand Teton National Park	1
Another State	1
<hr/> Total Response	<hr/> 442

Q. How many pre-Kindergarten children do you have?

1	246
2	120
3	4
4+	2
None, planning to have children	31
None, children are in school	39
<hr/> Total Response	<hr/> 442

Q. Have you looked for childcare/early childhood education?

Yes	378
No	63
Not Yet	38
<hr/> Total Response	<hr/> 441

Q. Please describe why you chose not to look for childcare or early childhood education.

- To early
- Use the hospital daycare
- we are currently at CLC in Rafter J
- Already enrolled
- I own a school.
- I'm planning on homeschooling them for their younger years.
- I already have child care with CLC
- My son is older. We looked when he was younger
- My children are grown up.
- Not pregnant nor do I have a child yet
- It is too expensive
- Too expensive!
- Not needed.
- wife was stay at home until they were school age. Could not afford daycare.

- He is already in childcare. It is provided with my company.
- Already been through it.
- Too expensive and I am able to work from home.
- Single Mom, I stay at home and take care of a little girl
- Because I take care of them.
- I cannot because I have a nanny who takes care of them at home
- daycare is provided by my mom

Q. What is your ideal childcare/early childhood education drop-off time?

	Pre 7:30	7:30- 8:30	Post 8:30
Sunday	12	9	3
Monday	60	301	50
Tuesday	59	295	48
Wednesday	60	300	51
Thursday	59	297	48
Friday	56	293	45
Saturday	14	15	2

Q. What is your ideal childcare/early childhood education pick-up time?

	Pre 4:30	4:30- 5:30	Post 5:30
Sunday	2	14	13
Monday	46	283	83
Tuesday	45	277	83
Wednesday	46	284	84
Thursday	45	282	80
Friday	40	280	80
Saturday	3	14	15

Q. What characteristics did you seek (or are you seeking) in selecting childcare/early childhood education?

Hours of operation	304
Location	300
Price	345
Financial assistance opportunities	79
Specific curriculum	142
Provider qualifications	272
Family atmosphere	212
Spanish-language skills	79
English-language skills	88
Outdoor activity	311
Total Response	413

Q. What type of childcare/early childhood education do/did you utilize?

Licensed facility	315
Grandparent or other close relative	84
Family friend or distant relative	50
Nanny	60
Have not yet secured any childcare/early childhood education	46
Total Response	412

Q. How much do you pay per child for childcare/early childhood education each year?

25th Percentile	\$8,000
Median	\$12,000
75th Percentile	\$15,000
Max	\$40,000
<hr/>	
Total Response	329

Q. Where is/was your childcare/early childhood education located?

Town of Jackson	289
Elsewhere in Teton County, Wyoming	63
Teton County, Idaho	8
Lincoln County, Wyoming	4
<hr/>	
Total Response	369

Q. What is your actual childcare/early childhood education drop-off time?

	Pre 7:30	7:30- 8:30	Post 8:30
Sunday	4	8	4
Monday	19	244	64
Tuesday	17	238	71
Wednesday	18	243	64
Thursday	19	238	69
Friday	19	215	59
Saturday	3	7	4

Q. What is your actual childcare/early childhood education pick-up time?

	Pre 4:30	4:30- 5:30	Post 5:30
Sunday	2	10	6
Monday	80	219	27
Tuesday	86	214	25
Wednesday	82	219	26
Thursday	87	211	25
Friday	67	203	23
Saturday	2	6	6

Q. Which, if any, of the characteristics you sought in selecting childcare/early childhood education were you UNABLE to attain?

Hours of operation	116
Location	54
Price	138
Financial assistance opportunity	53
Specific curriculum	45
Provider qualifications	35
Family atmosphere	26
Spanish-language skills	35
English-language skills	12
Outdoor activity	33
<hr/>	
Total Response	258

- Closes earlier
- Closures during spring break and Christmas/New Years week
- Core hours are 8:30 - 4:30, all extended hour spots (7:30-8:30 and 4:30-5:30) are currently full for child's age group.
- cost
- Cost
- Cost and availability
- Current childcare schedule works great with working- 7:30am-5:30pm
- currently my husband is home on Fridays b/c of scheduling care
- Currently the earliest we can drop off is 8, and latest pick up is 5. This is problematic when you work 8-5, 15 minutes away from the daycare facility.
- Days too long for teachers at full length
- Didn't realize the previous question was what I actually wanted, thought it was just drop off and pick up times in general. We only wanted her to go 2 days/week.
- Didnt want to pay for before-care
- Doesn't, I drop off late and pick up early but still pay for full time.
- Drop off 8, pick up 5, same as work hours. Need more flexibility for earlier dropoff and later pick up for parents who work full time
- Drop off if not until 7:45, which makes it very difficult for me to arrive on time at 8am to work.
- Drop off is currently 7:45 or later. Would like to drop off earlier. Would like the option to pick up later as well (after 5:30).
- Drop off time is 7:45 at the earliest, which makes it difficult to get to work on time.
- Drop off was 745 and pick up 515 - this was too tight. No flexibility in days scheduled.
- Drop off was later than needed and pick up is earlier than needed. This is a resort town and most jobs are NOT 9-5.
- Drop offs and picks are tight - 7:45 drop off and 5:15 pickup; I work 8 - 5
- Due to staffing needs, the CLC had to reduce overall hours covered under the general tuition. 1. We felt that having our kids in both before and after care was too many hours for them to be going to school. 2. Utilizing the before and after care option was too expensive, it would have put our total cost at more like 36,000\$ year. 3. We were able to make it work while sacrificing some work time / personal time, so that was more important to us than having our kids in day care for 10 hours a day.
- During parts of the year, the facility closes at 5:30 and we get off work at 5:15/5:30 so it is a huge scramble to get to pick up on time.
- Extra hours cost more and we can't afford it
- Facilities hours of operation
- Financial situation
- Flexibility
- For a long time, they only had room for our kids a couple days a week.
- from 7:30 to 5:30
- Have to have flexible work hours and child care hours to make both the job and day care work.
- Having to commit to a MWF schedule, rather than custom schedule. Also, schedule shortened to require less staff.
- holidays and weekends
- Hours of operation by provider
- Husband and wife switch off who picks up and drops off each day

- I cant drop off before 8:30 and must pick up before 5:30.
- I do not want to pay for the additional day
- I do wish I could drop off 15 minutes earlier, but our current facility opens at 7:45am. I make it work because I have to, but it makes getting to my job on time very difficult/near impossible.
- I get out of work at 5pm and daycare pickup ends at 5pm.
- I have not looked for one
- I sometimes pick up my son early depending on nanny and if she need to go somewhere
- I use the school district daycare and the schedule lines up with my work schedule nicely.
- I used to work less
- I work 12 hour shifts starting 7am or 7pm so I can neither drop off nor pick up my child on days I work - must be arranged for spouse or someone else to do also creating a burden on their ability to get their full hours in at work if they are on 10 hour shifts.
- I work in Kelly at the school, so dropping off my child in order to get to school is hard.
- I would like to pick up later than 5:00 and before 7:45
- "I would prefer to drop off between 7:30
- And 7:45 and pick up between 4 and 4:30..the drop off times I was provided to choose between are 8-4 or 8:30-4:30..I chose 8-4 so now I am late to work and leave early everyday"
- I would rather be able to have 3-4 days a week in childcare but cannot afford it.
- I'd like 7:30-5:30
- Ideal schedule is only available in the winter at JHMR
- Ideal schedule not offered, lottery for late pickup (between 4:30 and 5:30).
- Ideally we could afford to drop our child off at 730. But it is more expensive to have those hours and there is limited availability
- If less expensive we would pay for four days of care
- If we drop off at 8am, we pick up at 4pm. If we drop off at 8.30am then we pick up at 4.30pm
- In order to meet employment requirements, our school is not open Fridays.
- Interferes with work since I work in a restaurant. Simply we get out at 5 but in winter we can but in summer its complicated.
- It can be challenging to get to/from my job to the site during this hours
- It does actually - but the timeframes above were too broad. Most childcare facilities need kids picked up by 5pm, most jobs go past 5 pm. Major disconnect...
- It does not
- It is difficult to make it to work when I can't drop off before 7:30
- It is more expensive to add an hour in the morning, so we drop after 8:30.
- It is really hard to find facilities that open before 7:30.... our current facility had to make special arrangements for us part time
- It was difficult for our preschool to staff
- It would be ideal to pick up at 5 or later. We can but have to pay more for the extra time. We already pay extra for the early hour in the morning, so we opted out of the extra hour in the afternoon since it isn't imperative with our work schedules. The early drop off is.
- It would be nice if it aligned with school start times.
- It would be nice if pickup was after 3
- It's 8 to 5 and I need 730 to 530 due to work hours and commuting. Even 745 to 515 would be better.
- It's what's available and what we could (kind of) afford. It's the best for our kids, so we make it work.

- Lack of availability at my children's preschools (they attend 2 different schools). We have to fill in the gaps where there is no availability with nannies. My older child attends a school that is for 3-5 years old and my younger daughter's school is for 2-5 year olds. My 2 year old will go to the same school as my 5 year old starting in the fall.
- Location and days/hours offered by facility
- Lottery
- Luckily, St Johns Health daycare accommodates for early/late drop off/pick up due to our working schedules
- Money
- More expensive to have early drop off and late pick up
- MS daughter is now in after-school sport that goes til 6pm
- MUST BE AT PICK UP BY 5:15. THIS IS DIFFICULT IN SUMMER TRAFFIC
- My husband works an eastern time zone schedule and we'd prefer to pick-up before 4:30 but he often is not finished with work and it ends up being 4:30-5:30 pick-up. (They allow pick-up anytime, and we appreciate the flexibility on that.)
- My schedule is 7 am to 7 pm and the school is from 7:30 am to 4:30 pm
- My work schedule makes it difficult to find childcare that works with my hours.
- Need to be able to drop off and pick up while still working a full day.
- need to be at work by 8am but cant drop off until 8am. Same with Pickup...work until 5pm and cannot pickup after 5pm.
- No
- no
- No
- NO
- No options for a different schedule.
- No weekends
- No, this is ideal
- Not as of now
- Not available
- Not available
- not enough staff
- Not really -- However, I would prefer a 7:30 drop off rather than a 7:45
- Nothing opens before 730 that is a convenient location from our home to work.
- now that I am starting to work, it's complicated to pick up since sometimes I am 30 minutes away
- On waitlist for fulltime
- one doesn't have Friday care, one the hours are strict 8:30 - 4:30 with stiff penalties for early or late drop off pick up
- Only needed part time childcare this year due to combo of my and my husband's schedules. But both our hours are changing in next 2 months and we anticipate needing more care. Also I am pregnant and due in April and will need double the care come July. (Changing from 2 days/wk- 3 or 4 days/wk)
- Only secured spot for 2 days / week. Also, program now closed on Fridays so even if spots become available my facility cannot accommodate 5 day / wk care.
- Only Tuesday Thursday
- Our child care/school only goes till 3pm. We still pay 9900 a month and after school care is provided but is an additional cost. I wouldnt say free child care would be appropriate, but affordable childcare would.
- Our childcare actually has more flexibility in timing than we need, a good thing

- Our preschool only offers two mornings per week for my child's age group
- Our schedule was ok with only two days of childcare per week until the child care facility reduced their daily hours. Then the reduced hours became a hardship but there was not availability to add days for both our children in order to have more childcare days with reduced daily childcare hours.
- Our school is closed on Friday and child has to be picked up no later than 5:15.
- Ours closes at 5:00. 30 more minutes would be ideal.
- Pick is too early. Have to leave work early in order to get child.
- Pick up and drop off hours were adjusted in response to workforce challenges. We are able to pick up in the 'late' option, and drop off in the regular option – sometimes we are able to have flexibility to drop off earlier as needed.
- pick up time earlier then I would like
- Pick up was too early, was 5.
- Preschool is closed on Fridays.
- Price, availability, options
- Provider's lack of funding to provide/keep more staffing.
- Schedule changed after enrollment. We will not switch facilities as schedule is not the most important priority of mine. Our family has the privilege of being able to make a later drop-off & early pick-up work.
- She only watches her Mondays, Tuesdays and Wednesdays. We need Thursdays as well.
- Sometimes I need to be at work early and it would be nice to have a 7:00 drop-off option.
- Support staff.
- Take what we can get
- That is what is available
- That's what is available to me.
- The Childcare's Hours of Operation dictated timing.
- The daycare had to limit the number of kids during certain hours due to lack of employees. We found childcare two days a week from family.
- The hours are 7:30-5:00.
- The hours of operation are not ideal for our work schedule.
- The schedule is practical
- The work schedule is not adequate
- There is too much time between elementary school drop-off and preschool drop-off time.
- They are closed Fridays
- They are not open on Fridays
- They are not open on weekends and I work some weekends. We are on the waitlist for late pickup which is 5:30 instead of before 4:30
- they are the same
- they don't offer after 5:30
- They have the same days off like the school system but you pay per month and the daycare is closed a lot of days when parents have to work
- Those are the hours provided by the facility.
- Too early of a pick up time
- Very accommodating, we have the schedual we need.
- We are at CLC and these are the hours we were able to get through the CLC before/after care lottery
- We are paying to drop off our child before 8:30. We must pick up before 4:30. It would be nice if pick up was standard between 5-5:30. You can pay for this at CLC, but space is limited.

- We can only afford 2 days a week since quality care comes with a price in Jackson.
- We can't afford additional days/hours, and/or we are on waitlists. We moved here when our oldest was 3, and that seems too late to get into any preschool on my list in town.
- We can't afford to pay someone all the way until 5, so we pick-up at 4pm instead.
- We had to apply to get earlier drop off and pick up, which is a lottery system. And you have to reapply every year which is a little disconcerting if you don't get what you need then what?
- We often need earlier drop off and later pick up times because of the nature of our work (mountain guides)
- We pay for aftercare, so we would ideally have the ability to drop earlier than 8:30am without paying for before care
- We use the hospital daycare and mountain academy pre-k. Hospital hours are great and accommodate working families well. Mountain academy does not work within working families time schedule as well.
- We're unable to find childcare, on every wait list in town.
- We'd like to be able to afford one extra day of daycare.
- Work hours
- Work schedule
- Work schedule
- Work schedule
- Working doubles
- would effect the routine of care
- Would like more time at the end of the day
- Would like to be able to drop the kids off prior to 8 am.
- Yes
- Yes because of changes and cost
- Yes, I'd like to be able to drop off earlier and pick up later.
- Yes. We are at a day care that make you pay for extended care- hours before and after school. It's not ideal at all when before payment included 7:30-5:30. If I were a single working parent I don't know what I would do. Sometimes it still feels impossible to juggle the specific day care times and put in 40 hrs a week at work. This system does not support families who work full time. And to pay extra adds up quick! Especially when you have two kids.

- Cost
- Cost
- cost
- Cost of childcare as opposed to our income
- Cost of living in Jackson Hole + limited availability of options meant I had to choose what was available regardless of cost.
- Cost or real estate and cost of staffing
- COST, availability, inflexible payment structure around vacations
- Cost, availability, scheduling
- Cost, hours, environment
- Cost, no availability
- Cost, waitlists
- Day care centers are too expensive to afford for working families
- Daycare provider closing and not having any other affordable/decent options available in Teton Valley. Ended up bringing the baby over the pass to daycare in Jackson at \$70/day, they were understaffed and not qualified but cheapest option. We couldn't wait for our son to be old enough to go to the community school in Victor.
- Daycare was full - you took the first opening you could. You didn't decide - the system decides for you.
- Did not have a choice in the price. If you are middle class and work, you pay full price for everything and most of your paycheck goes to daycare. Does not seem fair.
- economics
- Even though we only have one income we still did not qualify for assistance
- expensive and limited hours due to staffing
- expensive to live here
- Facilities available for early childcare operators are often in commercial settings with little green space.
- Facility hours of operation
- Financial assistance was not offered
- financial help. more day cares and more place for financial help
- Financial situation
- Finding childcare that worked with 24/7 shift work or schedules outside of 8-5 hours.
- for the first year of our older child's care, we were paying a premium as we were on the waitlist for CLC
- General openings and availability at the childcare centers that accommodate working families. The hospital daycare was subsidized which was awesome but cost for most people is a huge barrier
- Hard to create a family atmosphere and sense of community when all the parents are rushing to get to work and pick up to get home and/or get another child.
- Hours of operation
- Hours of operation
- Hours of operation, so expensive,
- I can't afford to have my daughter in full time which is why I had to ask grandparents to help. Having two kids part time last year was like having a second mortgage .
- I don't know
- I live in Wilson
- I pay approximately \$2400.00 per month to have 2 kids in childcare full time. In the five years that my kids have been there, the tuition has increased four times. My monthly daycare bill is more than my paycheck.

- If my husband had not worked at the village, we would have had to pay way more money to be in town. The cheaper options in town are always full.
- In home day care
- income, lack of good child care in Victor
- Institutional setting
- It appears we make too much money to qualify for scholarships, but only make enough to live. There isn't any extra money left for savings.
- It is simply expensive.
- It's just expensive everywhere you look.
- It's not offered
- It's virtually too expensive for working people to have children in this valley.
- Just generally very expensive
- lack of availability
- Lack of available days at each preschool.
- Lack of dual immersion preschools
- Lack of employees to hire in town
- lack of information
- Lack of options
- Lack of options
- Lack of options and spaces, have to take what you can get. Had long wait lists for all programs. Started in a more expensive one and then transitioned to our current provider.
- Lack of programs
- Large expense for an actual working person in Teton County.
- Limited choices forces families to take what they can get in the way of childcare regardless of price or quality.
- Limited choices of affordable care options
- limited options from licensed providers in town
- Limited selection of childcare facilities here. We need 1 more the size of CLC, it seems
- Limited space in more affordable places
- Location is the biggest issue for us.
- Long wait lists
- Long waitlists
- Lottery, not enough staff
- Many of the providers did not have great childcare qualifications. They seemed to fit more of a "body in the room for child ratio reasons." When we asked the childcare facility how they go about choosing the employees, etc they stated that it is quite difficult to get truly qualified employees due to the cost of living in Jackson and the facility is not able to pay a high enough wage. Individuals are able to get a job in a hotel for a higher hourly wage. Ultimately we did not feel comfortable leaving our child in that facility. For our next child we will choose a different childcare setting.
- money
- Most convenient option was not necessarily the optimal option in terms of early childhood education.
- Most programs are full and don't have room for new children
- Moved from Lincoln County to Teton County so my son could attend Kindergarten in Teton County, but difficulty finding childcare for other children that is affordable in Teton County.
- My work schedule
- My work schedule does not work with the hours.

- Never offered
- No availability in daycares despite being on the waitlist since 9 weeks pregnant - my son is now 19 months
- No facility
- No financial aid offered
- No half day preschool for 3 year olds
- No infant availability for under \$90 per day
- No one is open as late as we'd like
- No one seems to have the longer hours with the schedule I need. We change days needed each season.
- No option to pick up child after 4:30.
- no options
- No other daycares available.
- none
- none thanks to CLC problem solving the schedule
- None were provided
- Not all childcare facilities have a consistent preschool curriculum
- not at the moment
- Not available
- Not available
- Not Available at
- Not eligible for hospital day care as a part time employee
- Not enough pre school options.
- Not enough slots available; childcare centers with slots are too expensive
- Not enough space
- not enough supply
- Not offered
- Not provided at affordable levels
- Not reasonable because not enough money and there isn't more places
- not spots available, way too much money, unqualified and illegal worker with sketchy home
- not sure
- On every waitlist in town
- On the wait list for two years. There is too much demand.
- Only offered M, W, F until 3pm
- Only open certain days, waitlists, want to have diversity and other schools don't have this.
- Only open on week days
- Originally couldn't get into a facility with hours that were within our budget. The PRICE is unattainable!!! We can't have another child due to the price of childcare!
- Our income is considered too high, even though we live paycheck to paycheck.
- Our income level didn't qualify for assistance
- Our preschool reduced their hours and increased their price. We now only have 32 hours of childcare even though both parents work 40 hours a week in jobs that do not have flexible hours. They also took away a sibling discount
- overcoming
- Pick up was too early for our jobs
- Preschool oriented facilities required pickup at or before 5 which is not possible for us.

- price
- Price and registrations
- Price is always a challenge. This is an expensive place to live and childcare is very expensive as well, making it hard to get ahead.
- Price is expensive, Jackson rent is expensive, pay bills and taxes
- Price is so high
- price is the most difficult piece. we can only afford part time
- Price is way too much
- price- it's too expensive
- price of adding before care
- Price, locations.
- Price, schedule
- Pricing and lack of options.
- Quality of care
- Schedule availability at CLC.
- See above
- Selecting a childcare with providers who are trained in early childhood education was too hard when also considering location and hours needed. Places like mountain academy close at 3:30- not realistic for a family working traditional hrs Monday through Friday.
- Simply not available
- space
- Space available - required ratios for providers to children
- Space is full at CLC- I have been on the waitlist since I was 8 weeks pregnant
- Spanish-speaking teachers are not currently employed by the preschool we selected.
- special need child
- The cost of having childcare for twins was unrealistic. Even if I were working full time all the money I would bring home would go directly to pay for childcare.
- The daycare we go to has the best price and is available via my husband's work, so this was the best option despite the timing.
- The days and times, too expensive, no financial aid.
- The Outdoor Learning Environment at the town CLC site is low quality, un-natural, and focuses on gross motor skills development.
- The preschool is only open MWF.
- the price
- the provider had to change hours
- The provider's lack of funds for more staff including the inability to retain staff due to housing issues and low pay. All while the cost for families is at the ceiling for affordability.
- The school implemented extended care options. We were forced to comply. It's not easy. And if you are late it's \$20/per kid/per minute. 5 minutes late = \$200 for 2 kids!
- The simple availability and options in the area. The prices are incredibly high compared to other places that we've lived. We needed to have care for our daughters in place when we transferred into Wyoming, so we actually started paying for childcare slots 1.5 months before we moved to Jackson. My husband is forest service and I work full time, so having no care was not an option and we don't have family in the area.
- The waitlist to enroll children in this town in licensed facilities is great. So many couples end up working opposite schedules or flying out a family member until they can get into daycare. Which can be YEARS.

- There are NO affordable daycare options in Teton County. The cheapest is \$67-\$70/daily. That is not affordable for the majority of people. Even making \$120k annually we cannot afford more than 2 days/week at a licensed childcare provider. We have a grandparent watch our child one day a week and one of us works from home the other 2 days a week.
- There are not many options in Victor, and the options in Jackson were either not available (I have been waitlisted at CLC for 4+ year) or outside our budget.
- There are not many options, and CLC didn't have room.
- There are not many places to send an infant so you kind of have to take what you can get and hope that you get off the waitlist somewhere
- There are very few options available in the county that provide a high quality, reasonably priced daycare / pre-school opportunity with flexible hours of operations. We looked at other options that had longer hours, but we felt it was more important for our children to go somewhere that had a proven track record of education and quality care.
- There are very limited options, & those that fit all of our wants/needs were not in our budget. Therefore, we have had to mix/match throughout the year
- There is not enough daycare
- There is very little to no early childhood training for preschool teachers.
- There were very few options available and waiting lists at almost every facility. We secured a spot and had to take it despite the cost.
- They couldn't offer me my ideal schedule.
- They say we make too much but after we pay for rent, healthcare (that costs us more than our rent) and daycare we are completely broke.
- to be a lower price
- to pay
- Too expensive
- Unable to find a preschool with openings. Currently on a wait list And he is being watched by family till we can get him in.
- unable to get off waitlist for daycare facilities in town
- Universal paid preschool through the state of WY
- Very expensive to live here
- wait listed (no room), too expensive, wrong hours, no child care during spring break etc (when we have to work). Semesters don't line up with seasonal schedules.
- Waiting lists, lack of available places I felt ok about leaving my children.
- Waiting lists, preference to siblings
- Waitlists
- Waitlists and location of alternative childcare programs
- Way too expensive.
- We can barely cover the cost of childcare, but we have no choice!
- We can't afford additional days/hours
- We didn't have a choice. We had to go with where there was space as we are on waitlists at 2 other facilities.
- We had me make it work
- We had no other options. This facility was the only one available.
- We just need Thursdays and most places need you to sign up for Tuesdays & Thursdays, rather than just one day a week.
- We made too much money

- When the Children's Learning Center decided to change their hours, they basically told the parents that they had a hiring/staffing issue and so they would have to modify their operational hours. Instead of solving their staffing issue internally, they looked to the families to shoulder that burden. However, the standard of care, facility and location is ideal for my family, which is why I had to tell my employer that 3 days a week I would have to leave early to pick up my child. Fortunately, I have a supportive employer and flexible enough job that I could leave early. However, not all families have that flexibility or support."
- accessibility and quality. Continued work on prioritizing our early childhood educators and increasing their pay and professional development.
- affordability
- "Affordability and accessibility, lack of licensed options and lack of options that provide EC education (curriculum). There seem to be many in-home day cares, but not many preschools that have the space or qualifications to serve the need. "
- Affordability and availability for infants. It's hard to say what I would do to fill it because of the workforce. You need 1 person for every 4 babies and that costs more, and providers should be paid well to do their job. Maybe what would help is state subsidies for enrollment and that savings can be passed on to the consumer and paid to the provider.
- affordability and availability. I would like to see government take a greater role in making this a priority and helping to create more affordable opportunities, glad to see that this is happening through this survey
- Affordability and limited space/providers
- Affordability and space
- Affordability for low income families, consider additional subsidized or nonprofit options
- Affordability for most "working" families.
- Affordable childcare and retaining providers
- affordable choices, and multi-lingual opportunities. Push for state sponsored financial assistance.
- Affordable licensed options, availability (long wait lists everywhere), staff turnover/retention. More facilities, better pay for staff, with housing options in Teton county.
- Affordable offerings are day care centers with no curriculum or early Ed programs. Few options available that have professional staff that working community members can afford.
- Affordable opportunities. Work with large employers in the valley to provide childcare through the workplace for working parents. Having more than one child in need of care makes it a tough call for both parents to keep working.
- Affordable quality childcare
- Amount available. People work odd schedules here and care is expensive. It'd be nice to match parents to share care but that doesn't have a curriculum.
- Attainability, quality and quantity. We need more infant care in this town.
- Availability
- availability
- availability
- availability
- Availability - and I really don't know how to make this happen, but it would be amazing if the state of Wyoming made free preschool available in our public schools as other states have done.
- Availability and Affordability
- Availability and affordability are the biggest problems. I would love to see more "experts" in early childhood development caring for our community's children. Currently, in many facilities, they are low-wage earners that don't necessarily have a college education.

- availability and affordability; it would be nice to have more options that could drive prices down
- availability and cost. training and education courses for people who would like to open their own facility
- Availability and price
- availability and price- government assistance to providers directly
- Availability and price, every child care center in this county currently has a large waiting list, we need more affordable child care centers AND after school care programs in this county. The county and state as well as local businesses need to chip in to open, facilitate and fund child care centers for the residents and workforce of this county. This service is currently solely put on the shoulders of citizens and private childcare facilities. Another big challenge is afterschool care and summer care for our elementary school child. All after school programs require young children to ride and exit an activity bus on their own and most after school programs are expensive. Summer care is an even bigger problem, with the most affordable summer camp running at \$45/day and only available from 8am-4pm. This doesn't work with most working families schedules.
- Availability in infant programs can only be solved with more programs,
- Availability is the biggest limitation. Each family has different needs. As a working mother, I found caring for my children as direct competition to successful career path. Availability means flexibility which would reduce stress on families, improve the early childhood education path and relieve stress on our public schools.
- Availability of qualified and reputable providers, along with financial assistance.
- Availability of quality care providers for young babies (8 weeks- 6mo). Very limited spots in all daycares due to high ratios needed. Caregivers should be paid more to support difficult nature of job.
- availability- we just need more options and more capacity in this community.
- Availability, flexible hours and affordability
- Availability, wait time. We could use more affordable licenced child care providers. Im not sure how we can fix it with the space jackson has.
- Availability. You have to put your name on a waitlist as soon as you are pregnant (or before) in hopes of maybe getting something that works before you go back to work.
- available employees and reasonable rent on commercial space
- Babies and toddlers under 2
- Better food
- Capacity!
- Care for 0-3years. Create more affordable options
- caregivers.
- children who turn 5 after the school cutoff - we need a universal pre-k program
- CLC Rafter J site needs to address staff turnover. We are seeking other options due to the fact that our child's teachers turnover constantly and it is impacting her learning and comfort at school
- Consistence in quality programming; Equity in access to Kinder-readiness
- cost
- cost
- Cost
- Cost - Also options for children who are in elementary when schools are cancelled (Idaho)
- COST and availability.
- Cost and hours are prohibitive. I feel like daycare facilities are squeezed on both sides by regulation and price and it makes the current model unsustainable for the educators.
- Cost of care is overwhelming for most parents - could state/federal subsidies help? We don't qualify for federal assistance. We are moving to Victor in a month and commuting to Jackson b/c we cannot afford cost of living and daycare.

- Cost of childcare.
- Cost! Most of us needing childcare are your Teton County Workforce.
- cost, availability
- COST, availability. The town, the community and the entire country needs to value childcare, childcare facilities and childcare workers a WHOLE lot more. We need to pay childcare workers more money for the hard work they do so employers can keep good people, minimize turnover and absenteeism, and provide service for hard-working families. The more early childhood education opportunities, the less interventions are necessary in the future!
- cost, enough qualified places for babies below 2
- Cost, quality, access
- Cost. I don't have a solution.
- Cost; subsidy from employers
- County provided pre-k
- daycare is expensive
- Don't know
- Drop in daycare for first responders. Infant childcare. Multiage childcare so kids can go with siblings.
- Ease of entering into a facility and time off other than school district schedule
- Easy! Infant care. It is impossible to find infant care in this town/county. I am speaking of age 3 months to 24 months. Until the child is 2, there is nothing available. The only option is to find someone to watch your child in their home. Not always idea. Never licensed. You need to have a lot of trust in the person caring for your infant. And the cost is a lot! over \$1000 a month per kid, even in this situation. We have three children and we never found any licensed care for them until they were 2.
- Educational programming and outdoor activities
- Encourage a parent to stay home during pre-K years, typically better financial option then working and better for children in the long run
- everything is functioning well
- Expense; grants.
- Facilities offering extended hours
- financial
- financial assistance from government
- Finding affordable childcare was tricky - all the waitlists were 0-3 years, even for the more pricey daycares. We lucked out and were able to use school district daycare, otherwise we would be paying thousands more. Employer-based opportunities seem promising, although not possible with every business.
- Finding care and an established education curriculum - I think making sure childcare teachers have access to professional development would be helpful
- Finding highly qualified early childhood teachers that can afford to work/live in the valley.
- for their to be scholarships and places with accessible prices based on our income
- "Getting good quality is extremely costly. Additionally, there are a limited
- Number of spots available, at the few places we chose as our top 3."
- Government subsidized childcare for middle and lower income families
- Have early drop off/late pickup options that work with nurses 7a-7p schedule
- Having available good facilities. There are not enough
- Higher level care at facility
- holiday coverage

- Hours and affordable prices. Lack of affordability is what causes so many to go to unlicensed locations where they watch tv all day.... widening the achievement gap in TCSD starting on day 1
- hours of operation based on a normal 9-5 workday, regardless of holidays
- Hours of operation, more staffing
- Hours of operations/days closed
- I am really happy with Children's learning center for my kids
- I do not have an answer on what I would do to fill it, but I do believe rental costs prohibits providers from being able to find affordable locations for their business. Also, at our daughters current childcare facility, 50% of the staff lives outside of the valley. Finding quality employees that can afford to live in Jackson on the pay they receive is a challenge.
- I don't know. It's very expensive.
- "I think it all boils down to real estate costs in this valley. There are very few options for quality facilities. The buildings that are available have high rent, which drives up costs for the parents and can force lower wages for care providers. High-quality care providers aren't able to afford to live in Jackson based on these lower wages, which makes it hard to retain these high-quality professionals.
- To fix...?
- Increase taxes/fees on 2nd, 3rd, and 4th homeowners. The more homes you own the more you should have to pay into our community to help keep it vibrant. This type of speculative real estate investing is causing insurmountable conditions for those of us that want to call this Valley home on a full-time basis.
- Modify the property tax structure so that permanent residents aren't pushed out simply because their middle-class wages or fixed incomes can't keep up with the increased taxes caused by the speculative real estate sales that are happening around them.
- Provide real estate subsidies to child care facilities with requirements that cost savings are applied to employee compensation/health insurance/401ks/etc."
- I think there should be more space in daycare and the prices more reasonable because they are so expensive
- I understand that the biggest need for child care is for children under the age of 2yrs - infants. I think that because of what people can afford and the necessary low adult/infant ratio, it may not be sustainable for providers financially. The other side of that is that only people with enough funds can afford childcare for infants. I don't know if CLC provides infant care, but it seems that infant care would need to be subsidized. In addition, it is unaffordable for providers to purchase or rent space to provide childcare. There is also lack of affordable housing for employees who are not paid much. Without employees, they cannot grow their programs/offerings. Solutions? I don't believe it is fair to put the financial burden of childcare on taxpayers. Is there some project with SPET that could create an infant child care facility? Yet that does not solve the housing/employment challenge in JH. I understand that there are grants through the state of WY to help get infant programs started, which is great.
- I wish there was more flexibility from licensed providers in terms of bringing kids on different or random days/hours, instead of sticking to a rigid schedule.
- I'd love a Montessori option.
- Immediate availability when you are trying to go back to work, and in a trustworthy location. I have no idea how to fix that.... affordable housing options?
- Incentives to providers?
- Infant care
- Infant care and pre-K / prep for Kindergarten
- Infant care is a mess in town and there are many, many barriers to opening a new childcare program. The town and county should identify a couple of those barriers and find ways to reduce them. We also need to

prioritize early childhood educators for subsidized housing. My child's teacher drives her from Driggs everyday and it's only a matter of time before she burns out.

- Infant care is a serious problem
- Infant care is in high demand. I have a regular work schedule, but my understanding that finding care for non-traditional work schedules that tend to come with a resort/tourist community (evenings, weekends, etc) is especially challenging.
- Infant care- very few places take infants.
- Infant Care.
- Infant Care. Add more providers.
- Infant care. We need more facilities!
- infant care; focus on outdoor free play
- Infant, its so hard to get infant care and its so expensive when you do get it
- Infant/Newborn care- There is simply not enough supply so I would increase the number of available options.
- Insufficient number of licensed facilities that are open 5 days/week 7:30-5:30pm
- It costs money. Government subsidized programs.
- It is too expensive. It makes it impractical to work if you are spending most of your income on childcare. I know many parents who choose to stay home with their kids rather than spending ~50%+ of their income to leave their child with someone else. Also, not enough childcare for the number of kids needing it.
- It's hard on families to make financial ends meet during Preschool years. Subsidized childcare costs would really help families get through to the elementary years.
- It's just expensive an inflexible. The fear of not having enough 'days' forces us to commit to more days (and expense then we might need. Space seems to be the leading problem. The location is expensive to the provider and thus the 'drop in' option is not financially viable. Our current provider is looking to expand but there simply isn't any space on the market (and certainly none at a viable price). Also, our provider offers an incredible schedule. They take very few vacation days off (they do not follow the school vaca schedule). This is very important. Also drop off is from 7:45-5:30. This allows for a full days work and no stress about finding alternatives during school breaks.
- It's not attainable for average working people
- It's expensive and if one doesn't work much you don't have enough for daycare
- it's very hard to understand local options; a "one-stop shop" for info would be huge. also just need more options; wait lists are very long from most places. suggest adding questions regarding this latter issue in the survey
- Just like the housing crisis we have a preschool/childcare crisis
- Just limited availability. Getting on waitlists before a child is even born is a bit daunting, especially as a first time mother without other kids in a routine of childcare, not knowing what is going to be needed and having to try to make decisions
- Just simple availability. We did not have a problem because my husband's work provided access to childcare, but I know a lot of people who had to wait to go back to work because they couldn't find childcare.
- Keeping highly qualified teachers employed, offering great benefits for those teacher and the administration level is not on top of things. We need professional development for people, administration needs to change and walk throughs are a MUST as our little children do not have voices.
- Keeping staff on a decent salary
- Kindergarten preparation emotionally
- Lack of affordable options, care until 6pm. Offer options to families with later pickup. Possibly you could pay more for that.

- Lack of capacity, lack of financial assistance.
- Lack of diversity of options. Work to establish a public private partnership with a daycare facility that focuses more on infant to 3 years old, since there are a number of facilities that are only open to 24+ months.
- Lack of English speaking childcare workers willing to work.
- Lack of options
- Lack of options, especially for infant care
- Lack of providers. Make regulations such that more are tenable.
- Lack of providers. The waitlists for some programs are years long. We need more capacity.
- Lack of space in successful and established Jackson daycare facility
- Limited availability, we were on multiple waitlists for one year
- Limited options exist for childcare. We were extremely fortunate to find a great situation, but I think many others struggle with this. Also, summer options for pre-K seem to be very limited.
- More affordable facilities to bring the cost down across all providers.
- More affordable housing for teachers and affordable commercial rent for childcare facilities. Largest gap seems like it is in the infant (0-2 years) age group.
- More budget
- more crafts, leave homework
- More day care centers that are open during working hours and affordable enough that people can work and pay for daycare
- more daycare
- More daycares
- More facilities and supplemental assistance from government
- More local government funding to lower cost
- More options
- More options at a better price.
- more options for care at affordable prices.
- More pre school options vs day cares
- More qualified options in more locations
- More space for small children.
- NA
- Need better pre-school curriculum so they are more prepared for kindergarten. The kindergarten teachers should provide daycares with what kids should know coming into kindergarten.
- Need more assistance from the state to allow childcare pricing to be more affordable for MIDDLE CLASS families. The costs of living in Jackson are driving out the middle class and along with that the community that Jackson says that they hold so dearly.
- Need more supply. Build more facilities or expand existing.
- none
- not a lot and very expensive
- Not a lot of daycares and are expensive. Waitlist is long
- not enough availability at licensed facilities in town
- not enough availability, on the waitlist for 2 years
- Not enough availability, wait lists are way too long and tuition is too expensive. Need another facility and the government should do more to help Offset the costs.
- Not enough childcare options for <2yo
- Not enough childcare providers.

- Not enough employees. They may need to be paid more or offer other incentives.
- not enough options or spaces available
- Not enough providers in the community; expand the county daycare to include more children; ensure that other large employers in the county are offering employees affordable daycare
- Not enough providers much less affordable providers. Additional affordable centers subsidized by county/town/federal system similar to Children's Learning Center.
- not enough providers particularly for newborns, too expensive
- Not enough room for placement / too expensive / Educational benefit is completely lacking. State of WY step up and address the issue of educational benefits for birth to 5 year olds.
- Not enough spots for number of children, not affordable, no regulation on cost.
- Not many choices without a waitlist, so you have to compromise your preferences
- not sure
- Number of facilities and hours/days of operation
- openings.
- Options for different work scheduled, price and then after school care for young children
- Options for non-traditional schedules including hours of the day and days of the week. Many licensed "programs" are MWF or TT or M-F but not M-W or M-Thur or W-F etc if someone works consecutive days but only 3-4 days a week with longer hours. Otherwise you end up paying for 5 days a week for an already costly expense. Also weekend and evening/night options would be amazing.
- options of affordable childcare
- Options, especially with 2 children in at the same time.
- Options, so I guess that means open spaces!
- "Other than the time restraints the care is outstanding. I understand there are regulations coming from federal and state governances. I think money is a HUGE piece of the puzzle.
- Wyoming continues to cut cut cut valuable programs. Wyoming needs to take responsibility if we want to be successful in all arenas - raising little people to be successful and productive adults, for one! I know town and county contributes to keep these programs sustainable and well as the private sector.
- But to keep outstanding care, we also need to pay well which goes back to funding- from the state in my opinion. If public school teachers are paid so well in our community how can early childcare providers be paid equivalently? Just as important! But without the financial burden going to the families who are just trying to get by. I don't know if I have the answer but finding seems to be the common denominator."
- Paying caregivers more and providing them housing, etc. So we can get good people to watch our kids and people who will stay. Turnover is not good for kids.
- Pick-up and Drop-off times
- Price
- Price - subsidize child care
- Price and availability
- PRICE AND AVAILABILITY. NO ONE CAN AFFORD \$100/DAY CHILDCARE LET ALONE HAVE MORE THAN A ONE CHILD HOME EVERY 5 YEARS AT THAT RATE. THEY KNOW WAITING LISTS ARE SO LONG THAT YOU ARE FORCED TO PAY WHATEVER THEY WANT. OUR RATES WENT UP EVERY YEAR FOR 3 YEARS AN NOTHING CHANGED ABOUT THE CARE BUT WE COULDN'T LEAVE BECAUSE THERE WAS NO WHERE ELSE AVAILABLE
- Price and consistency of staff . People in child care are not getting rich and the work and job is very taxing. The majority of people who need child care make sacrifices to afford it. I have no idea how to these two things.
- price and quality education

- Price is insane
- Price is so high it is basically unaffordable. Pick up times do not allow parents to work a full day.
- Price is such a problem
- Price! More state assistance.
- Price, availability. Universal free quality childcare - have you read Elizabeth Warren's plan?
- Price--lower prices and availability. Being on a waitlist for three years is not helpful.
- Pricing
- Pricing and availability; perhaps offer different rates for different ages.
- Provide Non-GMO snacks
- Provider qualifications is lacking and knowledge and expertise on play based education
- Qualified caregivers & the ability to pay them a living wage. AFFORDABLE HOUSING, workforce services, somehow addressing the insane wealth disparity that makes our community a joke for working class families
- Qualified providers
- Qualified teachers, teachers who are college educated and have degrees in education
- Quality childcare before age 2
- quality environment with an affordable price
- quality infant care. Higher wages for teachers
- Raising teacher wages/affordable housing
- seems like there are a lot of people that work evenings and weekends and childcare is not available at that time. The only solution would be to have a daycare open for that time that doesn't cost any more money (which is already a lot), but Jackson and staffing are difficult. Also, daycares are closed around all school holidays (Christmas/Spring Break) and all parents are not teachers.
- shared values and philosophy for a reasonable price
- Some of the "preschools" we looked at were more of a daycare facility and we wanted a better learning environment for our child.
- Something for parents who work early or late or weekends. It is really hard to pay childcare workers enough that they can afford to live in Jackson. Same as most of the rest of us. The struggle is real.
- Space availability
- Space is small
- Space. Just need to have another CLC size facility somewhere. Maybe one way to do it would be to tie new spaces into affordable housing projects. You see a lot of the new housing projects in town have some kind of retail or business component, well, maybe early childcare should be suggested as an option for those new developments.
- Spaces are limited and we are on waitlists. We have family in town and can make it work but if we didn't, it'd be really hard.
- Spaces, I assume most programs are quality, just not enough spaces for real working schedules (8-5 work, so 30 on either side of that).
- Staffing + physical infrastructure
- Staffing and funding. ECE staff are sorely needed in this county and there is very little money to fund them. The ones who do work in the County are under paid and over worked. They could make more money as bartenders but they all love their jobs. The county needs to offer benefits to ECE teachers that are the same as TCSD employees (housing opportunities, good benefits, higher pay than other states, lots of time off). ECE teachers need to be given career development opportunities. Asking individual families to pay more in tuition is not an option, as a family of 4, we are already paying almost 20% of our income towards daycare already

and we both have relatively upper middle class incomes. Public / Private partnerships should be sought to create a daycare endowment that accredited institutions in town could draw from to fund staff.

- Staffing, affordable site rent
- Summer
- Supply and demand is out of balance. Affordability is hard for daycare operators with high rent and hourly wages to support cost of living in Jackson. Those costs get passed down to families. I feel the quality of daycares are excellent but the affordability/availability is difficult for a normal working family. Possible financial assistance for daycare owners that they could pass on to families?
- Supply! There are not enough licensed daycares.
- Teacher pay is too low. Would require state assistance to raise.
- teacher retention. teachers need higher salaries.
- The amount of options/places with availability
- The biggest gap is number of providers. Wait lists are prevalent. The barrier to entry to be a provider seems to be adequate, cost effective space. Solutions would need to address that issue.
- The cost.
- The lack of financial assistance, the lack of quality daycare and a reasonable price
- The lack of open spots helps jack up the price. We need more, quality day cares that are affordable.
- The largest gap I think is availability - currently I am sending my child to two different childcare locations because of the schedule availability at either school. I think it is more difficult on him to not have a consistent schedule with the same peers/teachers. However, I know that I am lucky to have my child in any care at all based on current waitlists around the community.
- The number/capacity of high quality providers. The physical space, staff qualifications, and level of service desired by parents are difficult for providers to achieve. The cost of providing these services here is probably a barrier to the providers and their staff alike, and there simply aren't enough providers for the number of young children here.
- The pre-preschool age (under 2) is really difficult. There just aren't that many providers in Teton County and all the providers have waitlists. Encouraging the existing preschools to open baby rooms is hard because of the added space required—you really need a separate room—and added licensing requirements. If the county could help locate locations I think we have qualified and capable individuals in our area, they just don't have an appropriate space.
- the price is too expensive. We do not have the privileged to make tons of money to pay for it. There is a lot of bills to pay at home.
- The quality and quantity of childcare are huge gaps in making it accessible for all families. In a dream world, I would change the state ratios for infants to 1:2, have supervising staff that checks in with each facility and provides professional development that is appropriately designed for each age group, and create a sliding scale for tuition.
- The sheer volume of childcare available. It does not seem to meet the actual demand and forces people to split organizations in locations to meet their needs. It's also quite expensive. We are fortunate to have stable housing, but childcare is our most significant stressor.
- The simple availability of spaces in childcare is really tough. I've heard many people complaining about the lack of childcare spaces to fill. The cost is also extremely high in this area, especially for your local workforce members. It's been really hard to balance our monthly budget with this huge expense. If we didn't have subsidized housing from the forest service we wouldn't be able to pay all of our bills each month. I think that the housing issues and the childcare issues go hand-in-hand and affordability is a huge issue in both of these

areas. I'd think more holistically about how to support families in the local area and how you can help support affordability for your working class citizens.

- The wait lists for infants are too long at the established centers (up to two years), and too many parents are having to quit their jobs to watch the kids, or hire a nanny in order to keep their job. I personally believe this is not a great option. My good friend hired a nanny recommended by one of the local nanny services to fill in childcare gaps, and the nanny physically abused her one-year old son. It was horrifying and tragic.
- There are almost no part time options. I would like M-F morning schedule for a 2 year old.
- There are just so few. Not many spots available. Long waitlists for the more affordable options.
- There are no options. If you manage to get childcare somewhere it is impossible to switch if you become dissatisfied because waitlists for other facilities are so long. It takes years to get into a childcare facility once on a waitlist.
- There are not enough childhood education providers in the valley. And because there is huge demand the cost is now insane.
- There are not enough daycare/preschool facilities for all of the local children. We were forced to do nanny shares which are great, but more expensive than daycare/preschool.
- There are not enough providers to meet the demand. I wish the ratio of adults to children was less.
- There are not enough quality child care options that don't have a waitlist. Finances was not a problem for us. Was willing to pay whatever it cost but there were only 2-3 places in town I would even consider sending my child to and they all had long waitlists. The good reputable places with stable and happy staff all have waitlists.
- there are too little spots available in affordable, quality, licensed care facilities. Staffing is a huge issue. Figuring out how to pay early childhood teachers a livable wage in teton county is a huge struggle.
- There are too many to list. Infant care is almost non-existent. Staff turnover even at the most qualified places is a huge problem. General quality of care and curriculum is lacking. Only found one good place - JH Discovery.
- There aren't enough providers for infants, toddlers. Make more housing available.
- There is a lack of affordable care that is quality education for our Pre-K. I would love something less expensive with an actual curriculum and quality programming.
- There is a waitlist everywhere, and if you're not able to wait you're in a tight situation. That's when people get desperate and end up leaving kids with unqualified people or facilities disregard the ratios. When CLC had its licensing issue I tried to move our daughter and couldn't, because there was no where to go.
- There is an acute lack of availability in Preschools that offer all day or close to full days of care. There are plenty of day care options, but few true all day pre-schools. Many true preschools only offer half days, which are difficult for working families to accommodate .
- There is currently no preschool associated with the school district, which many other states and areas offer.
- There is just a lack of available providers.
- There is just not enough childcare--I have friends who were on the CLC wait-list for 3 years, and others that will never get off of it.
- There needs to be more childcare, especially in the under 2 years old segment. Early childhood educators should have the same advantage for Housing Authority options as other primary critical service providers.
- There were very little choices for daycare providers for our kids under age 2
- There's nothing available and everything that's out there is ridiculously expensive
- They are expensive and the waitlist is long
- Time availability, slots available for children
- To be at my possibilities

- Affordable options. Incentives for daycare providers to lower prices.
- Along with affordable housing another affordable childcare facility. Currently the waitlists at Children's Learning Center are too long.
- An option for sick children- when both parents work full-time there are no options other than not going to your job. I would also see an opportunity for more financial assistance for families who are working but still cannot afford childcare that is most often hard to find and even more often very expensive.
- As a teacher I would like to see state or county funded preschool for all! This money pays for itself over time.
- As an emergency dispatcher I work 12 hour shifts and there are no childcare options I've found that work with my schedule.
- As I mentioned before, infant care for working parents. Ages 3 months - 24 months. There is a huge need. It is also important parents know to start signing up for preschool wait list as soon as they know they are expecting a baby. That is the only way we were able to start a licensed preschool when the kids turned 2.
- Assistance for licensing, rent help for daycares, provider catalog with openings and availability that changes in real time.
- Availability
- Availability.
- become more accessible for daycare with new generations
- Being a Teton County Employee it would be nice if they offered daycare.
- Better programs and assistance from the government, financial aid for those in need. Actual availability - there are waitlists everywhere.
- Bilingual childcare is a must in this community!!!
- Can the town subsidize childcare education programs and provide discounted rents or real estate purchasing options to people who wish to provide such services?
- Cooperative childcare would be a good program to implement. The town and/or county could possibly help subsidize the space. There are many high functioning models of childcare cooperatives that can be reviewed.
- Cooperatives?
- Co-ops, volunteer hours to make up gaps in ability to pay
- cost and availability
- Cost. We receive assistance with our pre-k Costs but only because my husband works for the organization we use.
- create a public option
- Create a training program for nannies and babysitters to receive certifications in first aid, early childhood education, etc. This would fill a need that childcare centers don't have the capacity to address, and give parents peace of mind that their in home childcare providers were safe options for their children. Parents that lacked spaces at childcare facilities could form groups for nanny-shares. As a parent, I would have gladly paid to support a program that offered a pool of qualified nannies.
- daycare in cottonwood, rangeview area...close to 4 schools
- Demand far outweighs supply
- Difficult to achieve on such a lean government budget, but making space to care for children more affordable for providers would help a lot.
- district funded preschool
- Encourage parents to stay home
- Equity in access to quality programming for all children to ensure K-readiness, decrease opportunity gap starting at an early age; more integrated outdoor time for all children

- Every opportunity in the world this town totally sucks with childcare options most good places have a 2 year waitlist and cost more than buying a house costs.
- Expand incentives for employer-based childcare. Create a directory of childcare in the community. Offer incentives for people to rent out space for childcare programs in the community - it is hard for people to run daycares because of the cost of rent/buying space.
- Expand options. It seems like the biggest barrier is space that is affordable and up to code. If the town or county could provide spaces, I think that would go a long way towards having more options.
- extend the hours
- government assistance provided to providers directly
- government subsidizing; require developers in the community to reserve space for daycare facilities much like they are required to build units for affordable housing
- greater investment in subsidies for tuition (increasing pay for providers) + public investment in locations
- Have better pay for daycare providers and more housing options to keep them in Teton county.
- Help facilitate small biz development that emphasizes early care
- Higher wages with higher standards for hiring so that all childcare workers have a solid background in early childhood education.
- Hours of operation
- Housing for educators, perhaps creating our own QRIS program that reimburses programs who improve quality. Helping to streamline and support those who are trying to open new child care.
- Housing for teachers to attract people who are passionate about this work and well educated.
- I AM BAFLED THAT THE HOSPITAL AND THE SCHOOL HAVE A DAYCARE AND THAT THE COUNTY DOES NOT PROVIDE A DAYCARE TO ITS EMPLOYEES. IT IS ONE OF THE LARGEST EMPLOYERS HERE AND DOES THE LEAST IN TERMS OF CHILDCARE. THE CO-OP IS A JOKE TO SAY THE LEAST. WITH ONE PERSON WORKING, IF SHE IS SICK OR NEEDS A VACATION 4 KIDS ARE OUT CARE. AND HAVING TO COVER THAT LUNCH EVERYDAY IS BURDENSOME.
- I don't pretend to have the answer to this issue. A public option, county run possibly, seems far fetched.
- I hope that our early educators in the community all get the opportunity to have relevant professional development around best practices for early education. I would also like to see pay increase for our providers so that there were less turnover in staffing.
- I see there is a lot of help in the education and there is a lot of interest in our children. The therapies and educators have been an excellent help to my son.
- I think it would be helpful for the birth classes (for currently pregnant families) at St. John's hospital to speak about childcare and provide information about the different opportunities for childcare in the valley. It's so important to get on waitlists early and if you don't know to do that... then you are simply out of luck. It may be nice for there to be a centralized online location or meetings a few times a year for families to gain information from valley daycares/preschools.
- I think our community has great team work between the schools. CLC comes to the village to work with kids and families that need a little extra help, and more of that around the area could help everyone.
- I think the childcare we have is good but there isn't enough (particularly for infants), the waiting lists are unreal, and the price is very difficult for the middle-class working parent.
- I wish I could afford to work as a preschool teacher or help with creating an awesome program but the money isn't there. These teachers need more.
- I would like half day preschool for 3 and 4 year olds. I couldn't find any.
- I would love to see more spaces available. We are currently on waitlists and have no idea if we are going to get a spot when we need one.

- I'd love to see more reasonable rental opportunities to small business owners who are interested in running a full time, day care facility. Ideally landlords could receive some sort of tax abatement or rebate which might allow day care facilities to pay their employees more, making it a more desirable employment opportunity.
- If there could be some sort of financial assistance/subsidy to the daycare/preschools to pay their staff a living in Teton county wage or help with rent costs to offset that expense in the hopes that it would be transferred to the teachers? Maybe a landlord tax credit or something similar to housing mitigation? As a working family we can not afford to pay these people what they are worth
- Incentives for new daycares to start - hard market to break into with the cost of rent
- Incentivizing business-sponsored/in house childcare programs, drop-in daycare at cowork spaces,
- Increase number of licensed, qualified providers
- Integrate early childhood care into the Teton County School District. As with K-12 education, there are known benefits to early childhood education, both for the child and the parents (especially working mothers).
- Investment in affordable day care centers
- It is challenging...Does the housing trust/authority have the ability to build more affordable apartments specifically for preschool teachers? Does it have the authority to build a childcare center and provide space for private providers?
- It is financially very challenging, but this is the reality.
- It is hard to keep quality employees when they aren't paid sufficiently. Even if that means increased rates, I would prefer that to having more hours/days cut.
- It is too expensive
- It seems like there are plenty of opportunities, if only providers are able to secure locations and become certified.
- It would be nice to see more places that offered this, since every child care is maxed out, and having it be more affordable because most people do work 5 days a week and need that whole week of child care
- Just like early head start
- Keep government out of it!
- kids are already in school
- Lease town-owned properties to daycare providers at below-market rates
- Less expensive
- Less expensive, more standardized to prepare for Kinder
- List of available providers, costs and availability given to families at hospital
- Location sites for childcare are limited in this town. Rent is expensive. There needs to be an effort to provide suitable sites for childcare providers at resonable rates.
- Locations offered by the town and county for childcare centers so costs can be lower and more spots are available.
- Longer hours
- Make it more affordable and offer preschool as part of TCSD schooling.
- Make it more available. Waitlists are out of control and pricing is extremely high in most cases.
- more affordable (especially infant) childcare
- More affordable and available
- More affordable housing for staff, the school our kid goes to 70% of staff live in either Lincoln county, or Teton county, ID and this causes staffing issues during winter with road closures etc. plus long commutes for low pay.
- More affordable Montessori preschool and elementary education opportunities.
- More affordable options for working families without having to give up quality in childcare.

- More affordable options.
- More and affordable options
- More availability of high quality care
- More availability. Am currently on waitlist for every day care in town with 1 year notice, with no guarantee of finding childcare before it's needed.
- More care options
- More centers like CLC
- More child care facilities
- More child care options. Plus more economical options would be great
- More childcare providers / facilities.
- More day cares with financial assistance.
- more daycare for low income
- more daycare options, more staff, higher wages for staff, something else to eliminate staff turnover
- more economical
- More employers providing childcare for employees. Increased programs for infants so siblings can attend the same program.
- More facilities
- More facilities and more lower cost options
- More facilities, more affordable, more education and prep for K, more outside time (we live in Jackson, WY one of the most beautiful places in the world, kids should be outside as much as possible, connecting to their surroundings and learning about nature)
- More forest prek options, more facilities utilizing the outdoors. Creating a sustainable and affordable cost of childcare that promotes and supports working families, or those parents who might choose to go back into the workforce if they could afford it.
- More low cost childcare in particular infant
- More of it
- More of it. Would like a Montessori option.
- More opportunities. Streamlined processes for starting/opening childcare facilities. Subsidies for childcare providers were applicable.
- More options
- More options
- more options
- More options and a funded Pre-K program
- More options and a pay scale depending on family income. Also it would be nice if you did not have to pay for days when your child could not come because of sickness. Additionally, our daycare only goes through the school year, so summer options would be great.
- More options at affordable prices.
- More options for times that work for teachers
- More options in town and better pay for the caregivers.
- More options would be amazing but only if they are quality.
- More places like The Learning Academy in Driggs
- More pre school vs daycare, providing curriculum based learning.
- More preschools with qualified teachers
- "More programs for infants and toddlers under 2 years old.
- More programs in general.

- Higher pay for providers. On this note: Our program sees high turnaround - likely due to demands of job (caring for kids is challenging!) and inadequate pay. Several staff work other jobs... some to secure a free ski pass. I have thought it would be incredible if there was some way to ensure a free or reduced rate ski pass for childcare workers in the Valley! (Idea could go beyond ski passes too and extend to summer opportunities). Anything to help our childcare workers feel more valued and increase their likelihood to stay or work fewer jobs (thereby avoiding burnout!)"
- More programs that involve outdoor education
- More quality facilities
- More schools, daycare
- More skills in terms of reading and writing
- More summer programs for school aged kids. Flexible schedules would be nice (or ability to freeze without losing a spot). For daycare, my 4 year old will likely miss a lot this summer, but I don't want to lose her spot so i'll keep paying.
- more weekend opportunities for working parents for enrichment, especially in Teton Valley - parent/child dance, yoga, art, music, language, story time, swim lessons - ANYTHING! It is super frustrating that all of the enrichment opportunities are either on weekdays (and in the middle of the day) or in Jackson.
- More work-sponsored, onsite infant care (e.g. Teton Tiny Tots)
- No more opportunities. Just spots and affordability.
- Not enough qualified caregivers
- not right now
- Not sure
- Open more state-funded facilities, grant more childcare licenses
- opportunity for our children to assist safe places with early education based on our income
- Options for elementary school children when school is cancelled or PD day (TCSD has CREST, but Idaho schools do not...I would bring my daughter over for full day of something if there was an option)
- Our family does love the programs offered by the Children's Museum and by the Teton County Library. Finding ways to support those who are providing services to the community families and support existing programs.
- overcoming opportunity
- Paid maternal leave, employer subsidized childcare, more facilities
- Paying providers more and offering benefits to increase the number of providers in town as there js such a high demand
- Perhaps providing a directory of all of the licensensed daycares in the Jackson Hole region. When I found out I was pregnant I went around asking all my friends for recommendations. If there was a website that I could go to that listed all of the daycares in the area and, this may be a little too complicated, but reviews associated with the daycares (such as Google Reviews), that would be helpful. It would also keep the daycares accountable, knowing that people are reviewing them. For example, I work at a hotel, so I know that I need to provide the best service possible because if I provide bad service others will know about it via online reviews. If no one is talking about what happens in different daycares, there is no accountability. I only heard from word-of-mouth which ones were the most desireable versus which ones to avoid.
- Pre-School Teachers need to be paid more and they would attract good teachers
- Price, availability
- Price/more westbank locations
- Prices
- prices to be more accessible.

- Provide affordable housing so those working in child care can afford to stay in JH
- Provide enough pay to one parent so the other can stay home with the children.
- Provide housing for staff, and affordable location to house it
- Provide more financially reasonable, licensed child care facilities that start at 3 months old.
- Provide more scholarships for diversity and accessibility. Provide more community offerings for mama's groups, etc.
- Provide more spots at CLC
- providing benefits/ professional development for early childhood teachers
- Providing food!
- public pre k
- public preschool
- Public preschool
- Qualified teachers and staff members
- Quality staffing is the key to quality childcare and education.
- Ratios and professional development for staff.
- Reaching out to all licensed centers to assess programs offered and provide enrichment activities for teachers
- same as above
- scholarships
- See my last answer. We need teachers that can live in our community. Pay them more so they can live and stay here.
- See previous answer
- See prior (different/longer hours). Also it would be nice to have all-summer programs for those that are school age. 2020 will be the first summer we will have one between grades and we have yet to figure out how that will work if they have aged out of "daycare" but the only other options seem to be week-long or single day "camps".
- See response to lady question
- Services like early head start
- Should be tied to the school district
- skilled, experienced, background checked, and educated caregivers
- Space is limited in each local programs making wait lists long along with the costs too high
- Space is the issue, and profitability. Obviously there is demand. How can we get more quality early child care places to open when rent is high, and profits in this sector are low? I really think tying them in to affordable housing, and perhaps any new large development in town, could be a good way to gain more space slowly. Like there should be a child care plan in the Snow King master plan, for instance. And there should be child care plan in the 400 new homes slated for south park. etc. Overall idea: Tie childcare to development.
- State funded pre-K for all children
- State/Federal government subsidizing early childhood education.
- Stated earlier
- Subsidize tuition for families who need assistance, increase hours and days of childcare facilities,
- Subsidized childcare to encourage more utilization among children
- subsidized rent for locations, so that money could
- Subsidized space for private sector providers. Perhaps this is a discount on property tax, or allocating 'work' portions of county funded housing developments to childcare provider businesses and services.
- supplemental money for providers so they can reduce prices
- Teton county and town of Jackson should provide for employees

- That early childhood education teach them things.
- The County is currently developing a housing project on Mercill avenue. Portions of these apartments should be set aside as affordable homes for ECE teachers. Centers should be asked what they can do to help retain and nurture teachers and the County should implement their suggestions.
- The opportunity that children's learning center gives for the early head start.
- The school district could start a lottery to provide child care to 3 and 4 year olds much the same way that Denver public school does. The private child care facilities should be able to apply for county grants to provide employees with benefits so they can afford to live and take care of children in Teton County.
- There is a great need for drop-in childcare programs, but it is nearly impossible to find unless you can afford a private nanny. The KidJax program which was going to be opened by Danielle Haigh was a great model for filling this gap in the community, so I was sad to hear when that business did not come to fruition. Also, waitlists at all the daycare facilities are SO long due to the lack of providers and high turnover in the industry. When my husband and I relocated to Jackson 1 1/2 yrs ago (while pregnant), I called and put myself on every list- with most telling me it would be a 2-4 year wait for a spot. It also seems a bit unfair that many parents put themselves on the waitlists even before they have conceived - in order to expedite wait times. How does that family get a spot before the family who is actually expecting or in need of imminent care?
- There is a significant need for more early childcare options and providers in Teton County. There are not enough spaces for the number of children. Wait lists are too long and there is a lot of uncertainty for parents of young children who need to work. Better models that pay providers well and are reasonably priced for families who need to work.
- There needs to be more childcare centers and more affordable options so that parents can work. I'm not sure how to accomplish that but until it happens it will discourage families from having 2 incomes.
- "There needs to be more facilities for 0-2 year olds.
- Preschool curriculum should be aligned with TCSD standards so that all children are kindergarten ready."
- There needs to be more places that are affordable. Free daycare, or sliding scale daycare. I know our facility has scholarships, but there are few spots available. There also should be night daycares for people who work evenings. We as a society are already starting kids off on the wrong feet just because their parents might not work 9-5 or make a decent income. Jackson needs to support the families that keep this town afloat.
- There needs to be more qualified providers.
- There needs to be public/free preschool for ALL families who do not make enough to afford Jackson preschool prices
- There should be a organized pool of qualified substitute teachers/caregivers. Our facility, and others that I know of, often have to close one or more classrooms just because one teacher/caregiver is sick or road/weather issues prevent one teacher/caregiver from getting to work. It is hard to find qualified subs that are available on-call, especially outside of town, but if there was a large pool of subs that everyone could use, it would make it less likely that facilities have to close, limp along with a skeleton crew, or get by with a less-than-ideal sub. Facilities closing for the day on short notice has a huge impact on local families, but the facilities are left with no other option.
- There should be more available with highly qualified teachers. Finding providers who have teachers who were actually educated in early childhood education seems challenging. Public pre-k like some other states offer is lacking in Wyoming too.
- There should be more public funding for those who cannot afford preschool. This is an essential time for kids to begin learning that sets them up for success in kindergarten.
- They eat by them self and to share and be independent
- They take them out, to take care of them better

- They teach them discipline, to be social, to share, they prepare them to start school
- This county continues to grow at an exponential pace and the developers and businesses and the county and city who profit greatly from these new businesses take on no responsibility for providing affordable child care facilities for their workforce.
- This survey is a great first step. Programs need to be tailored to working families. There are a number of great programs in the community that don't meet the needs of working families since they're locked into the schedule of Teton County School district.
- To be a classroom for children under 4 years old
- to be more early age schools
- To be more financial assistance and to be able to quality for daycare.
- To be more programs like first learning center
- To become more independent and to do things without being shy
- To better - to check on the children more who don't pay attention. To have all children at the same level. Children with issues to get more attention.
- to have more options for the parents and to look for better opportunities for jobs and better support
- to have prices based on income
- to have the possibilities
- to join as a community to make a space much bigger. So the majority of the children have access to early childhood education
- to keep giving opportunity so they keep learning more
- To teach them to read, to do activities that are creative and educational.
- Town/county opening up their own facility for employees.
- Very very pleased with the care. Just wish it were more affordable for families and teachers got paid more- that's were the government needs to step in!
- We are a growing community and working people need childcare options.
- We have one child at the Children's Learning Center. I am very happy with the program. I love the creative projects they do. My child is always happy when I pick him up and drop him off. The teachers are caring and supportive to the children's needs.
- we need a lot more spaces to be made available, more staff, better paid
- We need a public provided pre K. All research shows that it greatly benefits students. We need to see childcare not just as daycare but for the learning experiences and opportunities it provides our students.
- We need more affordable housing to be able to attain qualified & great caregivers to be able to staff more facilities.
- We need more caregivers but less facilities.
- We need more options....everything is so expensive. Because they can charge a large amount
- We need much stricter guidelines for all of these facilities. I feel like most of them are really bad. Many the babies are left alone to cry and get off their schedules while children are mistreated by workers or ignored. It's a huge problem.
- We need qualified providers with a low student to teacher ratio. That's going to drive up the cost of childcare. Housing is a barrier to entry for this field. If we could support high quality providers with living stipends and help families pay the tuition, we might help make early childhood Ed / daycare access a little easier for most parents.
- We need to support high quality employees that want to make this their profession. We need to support them living close to where they work so they aren't adding hours of extra time to their work days commuting.

- With rents so high for commercial space, childcare costs will be high. We have to stop pretending that the affordable housing options in this valley are affordable. The hourly rates for childcare providers has to be pretty high (\$17-19) in order to make any profit. And that cost is put directly on to the parents. It also limits how many facilities you have since overhead costs are so high. So when you add high housing costs for parents and high costs for child care, it makes it almost impossible to even have children in this town, let alone find childcare.
- Would be great to have a published list of licensed care in the county.
- Would love to see more options for qualified childcare options. Currently there are long waitlists, especially for children ages 2 and under. Would love to see more qualified caregivers - not just bodies in a classroom to fulfill ratios.

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Appendix B: Provider Survey

Multiple Choice Questions

Q. What type of childcare/early childhood education provider are you?

Licensed facility	23
Stay at home parent	6
Grandparent or other close relative	2
Family friend or distant relative	0
Nanny	0
Child Care	1
parent	1
Used to work in daycare/ preschool	1
part time care giver	1
Co-op Daycare	1
Total Responses	37

Q. Where are you located?

Town of Jackson	24
Elsewhere in Teton County, Wyoming	11
Teton County, Idaho	0
Lincoln County, Wyoming	1
Total Responses	37

Q. How many years have you been providing care/education?

Mean	10
Median	6
Total Responses	35

Q. Do you intend to continue providing childcare/education after the current child(ren) is/are grown?

Yes, I intend to enroll new children	20
No, I am caring for a specific child (example: own children, grandchildren, family friend)	11
Not sure	3
Total Responses	37

Q. Why did you, or your facility, begin providing childcare/early childhood education?

Needed care/education for own child	13
To help a family member or friend	1
Professional pursuit based on education/training	12
To make money	2
Part of larger employee retention/benefit package	3
Community need	4
Total Responses	36

Q. What language(s) do you speak with the children?

English	34
Spanish	14
French	1
Sign language	1
Total Responses	36

Q. What education do you have in early childhood education or a related field?

STARS training to meet DFS certification	17
Bachelor's Degree	8
Master's Degree	4
Program specific certificate (example: Montessori, Reggio Emilia)	4
Infant Toddler Director Credential	1
ECE Certificate	4
Postpartum doula certification	1
lactation educator certification	1
100s of hours of ECE workshops and classes	1
None	8
Total Responses	37

Q. How many children under (by age) do you provide care for on an average day? (Licensed facilities only)

Less than 1 year old	80	9%
Age 1	103	12%
Age 2	162	19%
Age 3	214	25%
Age 4	207	24%
Age 5	94	11%
Total Responses	18	

Q. What is your maximum capacity? (Licensed facilities only)

Min	4
Median	37.5
Average	54
Max	251
Total Responses	18

Q. How is your maximum capacity set? (Licensed facilities only)

License capacity	16
Early Head Start	1
Head Start	2
Space and feel	1
Availability and amount of enrollment	1
Self-imposed based on the numbers that I feel the center runs most smoothly	1
Best practices for inclusion classrooms	1
Based on staffing ratios and DFS guidelines (not licensed by DFS b/c we are a govt entity)	1
Total Responses	18

Q. Has your maximum capacity changed since 2012? (Licensed facilities only)

No	10
Yes, it has decreased	4
Yes, it has increased	4
Total Responses	18

Q. Why did you increase, decrease, or not change your capacity? (Licensed facilities only)

- Coop and space limitations
- numbers work for current community needs
- We became certified under DFS and moved into a smaller building
- License
- Licensing-wise and space-wise, it is difficult for us to increase due to lack or ability to staff adequately and space constraints.
- Decrease was due to staffing difficulties
- It all depends on how many students apply and enroll
- I'm not sure I haven't been here since 2012
- We utilize ratios smaller than that of the State so we can have a higher quality of programming
- more need for care
- Increase due to waitlist demand (grew from capacity of 45 to 80); about to expand again this year, adding 35-40 more spaces.
- To keep up with costs
- Expanding facilities

Q. How many families are on your waitlist? (Licensed facilities only)

- 0 (3)
- 4
- 8
- 11
- 20
- 20
- 27
- 40
- 57
- 61
- 82
- over 200
- Hundreds
- There are some each year starting in March of the previous year, but as we run on an academic calendar, we don't usually have opportunities to pull from the waitlist once the school year has started.
- 0 (new season not open yet)

Q. How does a family move to the top of the waitlist? (Licensed facilities only)

First come, first serve	7
Sibling in program	11
Employment with organization	5
Based on need	1
Head Start Regulations	1
Early Head Start Standards	1
Risk factors	1
<hr/>	
Total Responses	20

Q. Do you employ teachers in addition to yourself? (Licensed facilities only)

Yes	16
No	1
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Total Responses	19

Q. How many teachers are employed in addition to the facility director? (Licensed facilities only)

1	1
2	3
4	2
6	1
8	1
9	2
10	2
12	1
13	1
25	1
38	1
<hr/>	
Total Responses	16

Q. Does the facility director also teach in the classroom? (Licensed facilities only)

Yes	5
No	9
Minimally. She also teaches at our victor campus	0
Permanent sub as needed	1
If needed for staffing purposes	1
<hr/>	
Total Responses	17

Q. What is the minimum level of education in early childhood education or a related field that all teachers in your classroom possess? (Licensed facilities only)

STARS training to meet DFS certification	12
Bachelor's Degree	3
ECE Certificate	1
CDA	2
High School diploma	1
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Total Responses	17

Q. What skills/experience do you seek when hiring teachers? (Licensed facilities only)

Childcare/early childhood education experience	12
Education in early childcare education	9
Childcare certification	4
Passion	2
Teachable/open to learning	1
<hr/>	
Total Responses	17

Q. How often does your typical teaching position turnover? (Licensed facilities only)

- Our average since 2012 is one part-time teacher every year. Full time staff has not turned over.
- It depends we have been doing well this year but in past some turn over every year
- we might see one teaching position open per year (maybe more for workers)
- one or two positions every school year
- 2 years (3)
- 2-3 years (2)
- One position every 2-3 years on average.
- 3 plus years
- 6 years average
- seasonally
- 20% annual turnover rate
- 0.25

Q. When do you open for drop-off? (Licensed facilities only)

	Pre 7:30	7:30- 8:30	Post 8:30
Sunday	0	0	0
Monday	3	14	3
Tuesday	3	14	3
Wednesday	3	14	3
Thursday	3	14	3
Friday	3	10	2
Saturday	0	1	1

Q. When do you require for pick-up? (Licensed facilities only)

	Pre 4:30	4:30- 5:30	Post 5:30
Sunday	0	0	0
Monday	6	12	3
Tuesday	6	12	3
Wednesday	6	12	3
Thursday	6	12	3
Friday	3	10	3
Saturday	0	0	0

Q. If any, what months or periods of time are you closed?

- County Holidays
- Winter break, spring break, some holiday and in services matching Tcsd
- We offer after school for families that need it and we are closed on the academic calendar so a week at thanksgiving, 2 weeks at Christmas, 2 weeks at spring break, and over the summer in addition to a few holidays and conference trade days.
- 1 week of spring break, between Christmas and New Years, staff training before TCSD school year begins (2 days), staff training after TCSD closes for summer (2 days)
- We mostly follow the public school calendar, but are open for children during teacher inservice days as well as summer time.
- Christmas break, Spring Break and holidays
- Major Holidays, Christmas break, Thanksgiving break, and Spring break.
- half of June, all of July and half of August
- half of June, July and August (we follow TCSD calendar)
- 9 holidays plus one week at Spring Break
- We are just closed 2 weeks at Christmas and 2 weeks at Spring Break
- Christmas/Holiday break and random Holidays
- Weekends, New Years DAY, 4th of July, Thanksgiving DAY, Christmas DAY
- We have an extended year so we are closed part of June-July- part of August for children 3-5 and for the 0-2 we run full year with 3 breaks of 2 weeks.
- open all year
- N/A (3)

Q. Do you charge money for the childcare/education you provide? (Licensed facilities only)

Yes	13
No	4
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Total Responses	17

Q. What is your rate structure?

- \$58/day
- 5-day \$18,800.00; 4-day \$16,000.00; 3-day \$13,200.00; 2-day \$9,900.00. Based off of 175 days of childcare for 5 days.
- 2-days \$504; 3-days \$730; 4-days \$940 [per month]
- \$60 to \$75 per day depending on schedule.
- \$65/day
- Infants: \$95 day, toddlers: \$77 day, Preschoolers: \$72 per day
- Between \$460 and \$1,471 [per month] depending on part time, full time, extended care or not
- \$994-\$1,400 per month
- Jackson campus: Preschool 2-Day: \$9,900; Preschool 3-Day: \$13,200; Preschool 5-Day: \$18,800; *No 4 day schedule available. Teton valley campus: Preschool 2-Day: \$4,900; Preschool 3-Day: \$6,900; Preschool 5-Day: \$9,900; *No 4 day schedule available
- Around \$270 per after school session
- depends on the employment status of the parent with the company
- Flat Daily Rate PLUS Hourly rate
- Monthly tuition (or may pay whole year up front for discounted rate)

Q. Do you accept tuition subsidies from the state?

Yes	6
No	6
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Total Responses	12

Q. Please describe any rate reduction or scholarship programs you have.

- When partnering with other non-profits we have scholarship and rate reduction programs. When we run our own programs we charge an afterschool fee.
- We have tuition assistance and reduced rates for faculty.
- Need-based scholarship - application created through One22
- I often offer partial scholarships for families who can't cover child care. We normally have between 8% and 15% of our children on scholarship. We offer work scholarships, with parents providing cleaning services as well as outright scholarship to help families out.
- FSA account, and payroll deduction
- We have private donors who contribute to a scholarship fund. Discounts for multi-child as well as coming 5 days a week.
- Employees pay half price
- none, we offer employee based care at a subsidized rate
- The hospital subsidizes approximately half of the cost for all SJH employees
- We offer a family discount, an employee discount, and about \$136,000 in annual scholarships awarded to needy families

Q. Do you receive any funding other than tuition?

Program specific fees	3
Subsidized rent	3
Donations	6
JH Childcare Helpers	2
State/Federal funding	1
Company subsidy	2
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Total Responses	11

Open Response Questions

Q. Please briefly describe your mission statement, curriculum, and/or goal in providing childcare/education.

- To help children and families find their way to fulfilling and constructive lives.
- A mission of St. John's, Bright Beginnings is a preschool established to provide children ages 2-5 of all races, creeds, and ethnic backgrounds with a stimulating learning environment. Bright Beginnings Episcopal Preschool is a small program with space for up to 20 children between 2-5 years old. We are open four days a week from 7:45 a.m. – 5:15 p.m. Throughout the day, we focus on the development of the whole child by emphasizing the process, not the product. We value individuality and offer support in creating confident, independent and well-rounded children. Our teachers have a variety of experience working with children and families. They participate in ongoing training and meet or exceed the Wyoming state licensing requirements. We believe in inspiring creativity, stimulating curiosity, building independent thinkers, establishing social and emotional stability, and encouraging problem solving. Our program will prepare any child for the kindergarten classroom while ensuring they have fun along the way."
- At St. John's Health Child Care, our mission is to provide care so parents (hospital employees) can work and provide the educational opportunities families would pursue if their work schedules did not impact their ability to enroll children in a "pre-school"
- At TCSD Cubs, it is our goal to provide a safe and nurturing environment where a child can grow emotionally, socially, cognitively, and physically. Our classrooms are arranged based on the Reggio Emilia, Pyramid Model, and Play based philosophies.
- CLC Mission Statement: Children's Learning Center supports the development of the whole child through: Quality Care and Education, Early Interventions and Access for All. Current CLC Vision Statement: We believe

that all children reach their full potential when given a strong start. CLC used a research based emergent curriculum and provides childcare/education to at-risk families through our Head Start/Early Head Start program, early intervention services through our special education program and full day/year round childcare to working families.

- CLC supports the development of the whole child/creative curriculum and montessori curriculum/ goal measured with Teaching Strategies Gold/
- Establish bond with grandchildren, some enrichment activities.
- Have an 100% literate community within Teton County
- Highest quality co-op child care with focus on education and safety of children.
- I am wanting to work with troubled youth as a future career
- Just cover teachers lunch and end of day
- keeping safe and loved, encouraging children to learn from our environment and everyday life, therefore they feel comfortable to keep exploring, teaching them to be self reliant based on their stages, and be able to work as a team
- My goal is to help children get a head start on kindergarten
- My goal is to spend time with my child and work part-time, rather than opt for full-time child care.
- Provide a nurturing and engaging experience focused on exploration and social/emotional needs
- Provide the best hands on care for my children
- Raise my children
- Reggio, Our mission is to inspire curiosity, engagement and leadership through transformative place-based education.
- The mission of The Montessori Schools of the Tetons, Inc. is to provide the Jackson Hole area with the highest quality early childhood education program. The implementation of this program follows the latest standards for excellent care and institutes the Montessori Method and philosophy of education. The goal of the program is to provide an environment in which children are allowed to develop to the fullest their own natural desire to learn.
- to be home and available to my child during this stage of his development.
- To engage children in learning through play, exploration and discovery.
- to foster a love of learning in children and prepare them for kindergarten
- To give every child the opportunity to grow and learn in an Early Childhood Education Setting
- To meet the emotional needs of young children, laying a loving foundation rooted in relationships and trust to ensure their future success in life.
- To provide a place to play, create, explore and discover.
- To provide excellence in education to 3-5 year old children and their families. Our program is inspired with the Reggio Emilia philosophy and Place-Based practices.
- To provide the best care in a safe, happy, healthy environment
- We use Creative Curriculum for preschoolers.

Q: What is the biggest challenge you have overcome in providing childcare/early childhood education?

- We have one teacher, finding subs for absences is a challenge and therefore we close when the director cannot come in OR parents who are certified and meet DFS requirements, will cover teacher hours so we can remain open.
- Affordability and qualified and trained staff
- Attracting and retaining qualified teachers and securing a sustainable funding model that does not require \$500,000 in annual private donations to maintain the program.

- being able to pay quality teachers while keeping ratios low
- Boredom if we're being honest. It is lonely and rather boring being a stay at home parent sometimes.
- Expanding to provide more care to more families
- Finding a compliant space. It is difficult to find commercial property that has outdoor space for a playground, enough parking, and with an owner willing to rent to someone running a child care facility.
- Finding playgroups to join on occasional basis
- Finding qualified staff
- Finding qualified staff to meet ratios in the classrooms
- funding changes at the state level
- I work in two daycares mainly, I have had micromanaging bosses who are stressed out and the lack of commitment of coworkers for their job, where I would end up doing more work, because they weren't very professionals or they were no show. Making the same money, even though I had more work to do, was what motivated me to start being a nanny, where I take care of two children and I can make more money and I don't have to respond for coworkers and work straight with parents and children. I wish people who are in this business would care more about their job, be more prepared academically, emotionally and mentally ready for the challenges that working with children bring.
- It doesn't make financial sense for me to work with the high cost if. Hold are in Jackson
- Need a new location
- Parent Participation
- Putting personal emotions aside for the care of the students
- Receiving the amount of applicants we wish to have in order to reach capacity
- Securing space for my school
- Space and direct costs (decent salaries for qualified workers)
- Staffing and being able to pay our faculty what they deserve. Also having a long waitlist and not being able to provide services for younger children
- Staffing obstacles. I started as Director last year (2018), after teaching here full time since 2016. Staffing with 3 teachers and a few fill-in substitutes 5 days/50 hours was burning out staff. While we are in the business of caring for the community's children, it is also my job to retain and care for our caregivers, making sure they do not burn out and stay energized and effective in their jobs.
- Teacher salary. We are not able to provide the amount of afterschool programming that our patrons would like.
- The balance of meeting community needs with producing a profit
- We want to expand our daycare, but it is very complicated to find space in town
- Working with multiple children at different stages of development

Q: What is the biggest barrier you face in continuing to providing childcare/early childhood education?

- A permanent facility- we are currently in temporary modular.
- Affordability
- Awareness of services, funding
- Being a stay at home parent I cannot provide for my family- as I am only "saving my family money" but I can't go to work because I can't make enough to even make it worth it to go to work.
- Being able to meet the needs of our families in a way that is beneficial to working families. The amount of time it takes for all of our paperwork to come through for new hires is ridiculous. More often than not, someone who wants to work for you, wants to start as soon as possible. The State of WY restrictions on fingerprinting having to be on paper only is quite frankly, ridiculous. Our county has the ability to submit electronic fingerprints, but WY will not accept them. How are we supposed to attract new hires when they

can be hired, but not start work for approx. 1 month? Also, it is a very physically and emotionally draining line of work, being in the caretaking business. It is often difficult for individuals to want to make a career out of this field.

- Funding
- Funding to expand services
- Growth, the demand is higher than the supply and teachers are hard to come by
- Having a place in Jackson to provide it and enough funding.
- High cost of living/ lack of affordable housing in Jackson vs the lower salary range for childcare teachers
- Lack of communication between staff members
- My career will suffer
- Need a new location
- Providing myself good quality time, I work with children 5 days between 8 - 10 hours, and at the end of the day I am exhausted, I go home eat and sleep. I find myself too tired sometimes to do things for myself. I looked into the option to open a daycare/preschool. You have to have a place that is affordable and maybe commercial if you want to have something with more children, permission from the owner to have children in the place you are renting, be on the right town zone, deal with licensing rules and fire safety and last, but not least find good employees, who love their job and who are staying long term. Some people start working and they realize they are not made for this job,"
- Same-Finding and keeping qualified staff to meet ratios in the classroom due to housing issues in the valley. Many of our staff travel from south through the canyon or over the pass
- scholarship opportunities for more children
- Space that would allow our facility to remain open at an affordable rate.
- Space--if we had the space, I would love to offer childcare to more children to support more families.
- Staff turnover
- Staffing
- The cost of our lease, utilities, and staff continue to increase while it is hard to ask young families to pay more for the service we provide.
- The lack of qualified personnel, and space.
- The waitlist keeps growing -- I can't "solve" it, only "manage" it.

Q: What types of support/programs would you use if they were available?

- A more flexible childcare subsidy program from DFS
- Activities around town to get us out of the house, camps for toddlers, community child focused events, financial assistance
- Always researching opportunities to educate my staff
- availability of a nanny-share group, program
- Childcare sub list
- COMMUNITY ACTIVITIES
- Community events
- Employee/affordable housing
- Expansion grants, subsidized rent, professional development.
- funding, better access to quality continuing education, licensing lowering minimum ratios
- Grants and donations
- Group therapy

- I have always thought families who are struggling need access to monthly funds for help to subsidize the cost of care. This would be for those who don't quite make the DFS cutoffs or who have sudden unexpected expenses and need help short term. I would also like to see a fund for providing exceptional teacher training. the Department of Workforce Services will provide competitive training funds every so often up to \$1000. The cost for someone to go through an okay Montessori teacher training starts at \$8000. (And that is only tuition).
- I know there is plenty of options for training academically on child care. But we need that people who are working with children or parents be emotionally and mentally prepared or supported to raise healthy children. I am not sure if there is governmental support for this or postpartum depression care for moms. Also we need more places where children can have gross motor activities indoors in winter, that can be affordable. Some parents have to pay for childcare and also places where they can take their children. Going outside is not always a choice either weather related or children's age I know Rec center have toddler time, which is just Monday, Wednesday and Friday 10:00- 13:00, and is more affordable. Axis has an open gym, I don't know what days, one mom told me it was just some days and from what I gather on internet is at least \$15 (preschool open gym). Children's museum, \$9-\$10 children can play in that climbing gym, make projects, play with toys, sometimes could get crowded and children would like to run, but it is not allowed. Library, they have story time, for 20 minutes where kids can listen stories and dance between stories and they have a small room with toys, which at sometimes gets too small for the amount of people visiting during the three (Tuesday for 3 and younger) or two (Thursday for 4 to 6 year old) story times
- If no affordable child care options are going to become available maybe the county can set up some sort of meet and greet options so that stay at home parents can meet other parents and our kids can have more interaction with other children. Especially living outside of town, my child doesn't really spend any time with kids her age. Maybe a discounted deal at the rec center once a week or a weekly meet at the library or a park or something.
- Occasional group field trips
- perhaps more government subsidy?
- Pool of certified teachers/providers interested in part time work
- Rotating sub list for the county. Why we cannot collaborate (due to WY licensing restraints), is a mystery to me.
- SPED Training and Universal Design workshops
- Subsidized facilities/ rent for permanent home.
- Trainings for staff, help staff find housing
- Workforce housing support/ affordable homes and rentals, early education/ childcare subsidies to help keep childcare in the affordable range for families

Q: What is the biggest threat to quality childcare/early childhood education in the community?

- Available space and increasing rates for infant care.
- Communication and funding
- Complacency- parents seem to have just accepted that the prices are just "normal" and we have to deal with it and pay for it or quit our jobs and stay home with our kids.
- Cost
- Educators not being able to live off their wages.
- Employees are not paid appropriately and don't have enough of them in the community
- Expensive commercial rentals, expensive childhood furniture.
- Finding a facility and rent
- having housing for the staff

- High cost of living
- Housing and salaries for quality childcare staff
- Housing is quite difficult for child care workers. We can't afford to pay our staff the highest wages in the county because we depend on young families for our income and don't want to price ourselves out of business, so providing a high enough wage for market rate housing is impossible.
- Just hiring anyone as a warm body
- lack of affordable day care providers
- Lack of providers and affordable facilities
- Lack of quality staffing.
- Low Pay
- Poverty, housing, health benefits and lack of professionals in this area. I know we live in a particular place where people have lots of money, but the regular worker or some families sometimes struggle with the amount of money they are making, therefore finding a place to settle in this town is not appealing, some private daycares barely provide the basic health benefits and it seems that working in a daycare/preschool it is not something people are proud of it or they look into as a career, committing for a long term"
- Qualified staff
- quality teachers/ staff
- Retaining employees
- rising costs for families
- Space and expense for families.
- Space and/or rent costs,
- Space, cost, staffing (transient population)
- Teacher not being recognized or compensated appropriately
- The ability to locally house and adequately pay care staff to make a livable wage in this community.
- The cost of living and the fact that I would probably make more money working than I would spend on child care (not by much, but it would be a slight net positive). It feels like I'm potentially undermining my financial security in order to be the primary caregiver for my child.

Q: What is the biggest opportunity for quality childcare/early childhood education in the community?

- Affordable facilities
- Affordable spaces for childcare businesses, affordable housing for lower income childcare workers
- Bilingual early childcare
- Good Pay
- I could see more collaborations with public/private facilities, like the school district childcare, St. John's and CLC. However, those partnerships would need to be set up on a competitive basis and monitored by the Town and County, hospital and school district on a more regular basis, with the opportunity for new organizations or management stepping in. Some sort of regular RFP process would help, with guidelines for and minimum criteria set for applicants. Because of the high cost of real property here, the support would come in the form of providing appropriate space for programs to rent at a subsidized rate. I will be honest and say that it does not seem fair to those of us paying market rate for our space to compete with others who do not pay as much for pretty new buildings owned by the County.
- Increase community funded childcare
- Opportunity to provide more childcare options for low to medium income family
- Partnerships and a strong community support.
- Recognition of how important it is, funding, more availability of quality and diverse continuing education for teachers.

- Recognition of importance of quality early childhood care by local government and support in lowering expense
- staff retention, changing program when necessary to meet current needs.
- Subsidized childcare and low rent spaces for childcare or more county run childcare with diverse program options.
- The utilization of the recent state grant money to adequately educate teachers and recruit potential teachers/caregivers
- There is plenty of willingness in the community to improve things
- To have a really great opportunity to become a great facility to help children grow and learn
- To provide a high-quality program for children from birth to 5 years old. Children thrive in safe, engaging, age appropriate environments.
- We are so lucky to have the resources we have in this community. If we were to adequately fund for excellent caregivers/preschools and help families in this community, we could be a leader for quality childcare in not only our county, but our state. I am very interested in universal childcare and think WY is a great candidate for this program.
- Work with DFS and legislation wot professionalize the field.
- Working with the county to find a permanent home!

Q: Is there anything else you would like to share on the topic?

- Although our families seem content with the schedule we offer here, we do have parents who work shifts that vary. I don't know how needed it is, but I bet there is some need for child care when most of us are not open- weekends, evenings, and holidays. I have had three families over the past 5 years who have arranged with me to drop children off before we open and pick them up after we close. I do not charge extra for this, but it does make for an exceptionally long day for us all.
- Childcare providers can't afford to pay for quality employees
- I would like to see all snacks be non-GMO.
- Is there anything else you would like to share on the topic?
- The lack of recognition and compensation will turn any die-hard teacher away from the profession, after years of what feels like social and emotional abuse.
- There are not enough available childcare spaces to meet the workforce demand...particularly for infants and toddlers; it is difficult to keep childcare rates affordable for working families; it has become increasingly difficult to attract and keep qualified early education teachers due to low pay and high cost of housing.
- We need help from the county! There is a huge demand for childcare but childcare facilities often cannot afford buy a building/ afford rent.
- Yes, I think most employers should offer childcare benefits.