

MAPPING THE GAP™

EXPLORING CHILD CARE SUPPLY & DEMAND IN DELAWARE

State Overview

In Delaware, child care makes up an average of 10 percent to 12 percent of the median income, with single parents paying 34 percent of their income for infant care. Married couples with two children living at the poverty line are paying 93 percent of their income on center care without Purchase of Care subsidy. The average cost for center-based care is \$10,396 and \$7,347 for family child care. The average cost of child care for a four year old is \$8,308 for center-based child care and \$6,539 for family child care.* For more information on the cost of care in your state, visit our [2017 Parents and the High Cost of Child Care Report](#).

**Cost information was collected in March 2017 for the Parents and the High Cost of Care Report: 2017*

In Delaware, we examined three key issues around child care supply and demand: overall supply of child care slots compared to the number of working parents across the state; the supply and demand for infant/toddler care (children under 3 years old); and whether Purchase of Care subsidies mirror the demand for those subsidies.

Mapping Child Care Supply and Demand Gaps

For each map, we examined the locations of child care providers and children by zip code, including county boundaries for reference.

Data Collection

Supply:

The licensed child care programs and the number of spaces per early care and learning program were obtained using data from NACCRRAware with permission from the license holder in July 2017

Demand:

The number of children under the age of 12 with

all parents in the labor force in each zip code was obtained using "Census table B23008: Age of Own Children Under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents from 2011-2015 American Community Survey 5-Year-Estimates." To obtain the number of children under 12 with all parents in the labor force, we took the percentage of children under 6 with all parents in the labor force, compared to all children, and applied it to the number of children under 12 in each zip code.

Findings

In Delaware, there are more than 118,000 children under the age of 12 with all parents (single or two parents) in the labor force. Although there are 50,613 licensed child care slots across the state, there is still a child care supply gap of more than 68,000 slots across the state. **This means more than half of children under 12 do not have access to a licensed child care provider while their parents are at work.**

Delaware is vested in quality and aims to provide higher quality child care across the state. Enrollment in the QRIS system gives child care providers incentive to meet the requirements of a higher star rating. When this data was collected in summer 2017, there were 490 programs registered in [Delaware Stars](#). Of the 490 programs, 210 are rated 5 stars, 115 at 4 stars, 81 at 3 stars, 57 at 2 stars and 27 at 1 star.

The points on the map on the next page show licensed child care providers participating in [Delaware Stars](#) and are color coded by their participation. The tiers of quality denote 5 stars as the highest quality and 1 star as the lowest level of Quality Rating & Improvement System (QRIS) participation.

CONTACT

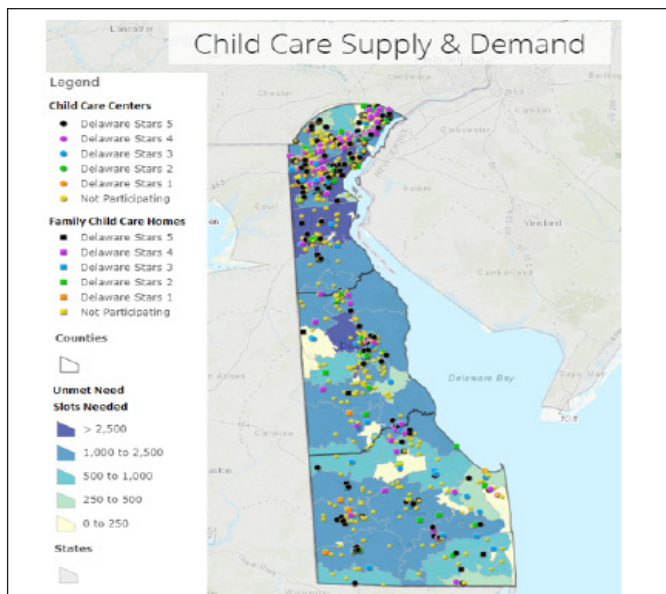
Phone: : (703) 822-7734
Email: learnmore@usa.childcareaware.org
Website: usa.childcareaware.org

ADDRESS

1515 N. Courthouse Rd.
 3rd Floor
 Arlington, VA 22201

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The providers have been broken down by family child care homes (squares) and child care centers (circles). The gradients of blue and green that cover the state are divided by zip code. The darkest blue areas illustrate zip codes with the largest gap of unmet need (the difference between number of children living in that zip code and the child care slots available in the zip code).

The cream areas in the map below illustrate zip codes where the need for child care is met.

We realize that parents do not always choose child care in the zip code where they live, so it is best to look at the surrounding zip codes as well. When there are multiple zip codes of darker blue near each other, even if there are child care providers in those areas, this shows higher unmet needs. There are many factors that influence a family's choice of child care.

Additionally, it is important to look at the percentage of unmet needs not only at the number of slot needed. New Castle County has the largest unmet need by actual slots (38,030 slots) which is 52 percent. Sussex County has a much smaller unmet need by slots (16,766) but that is 69 percent of the population. Kent County has the lowest unmet need by slots (12,885) but is in the middle by percentage at 61percent.

Mapping Infant & Toddler Supply and Demand Gaps

In Delaware, as in most states, providers are regulated on the number of children by age group they may care for in order to ensure there is enough staff and resources to safely care for children. Child care centers must abide by teacher to child ratios determined by age. The number of children for which family child care providers can care for varies based on the age of the children, the provider's training, and other criteria.

Data Collection

Supply:

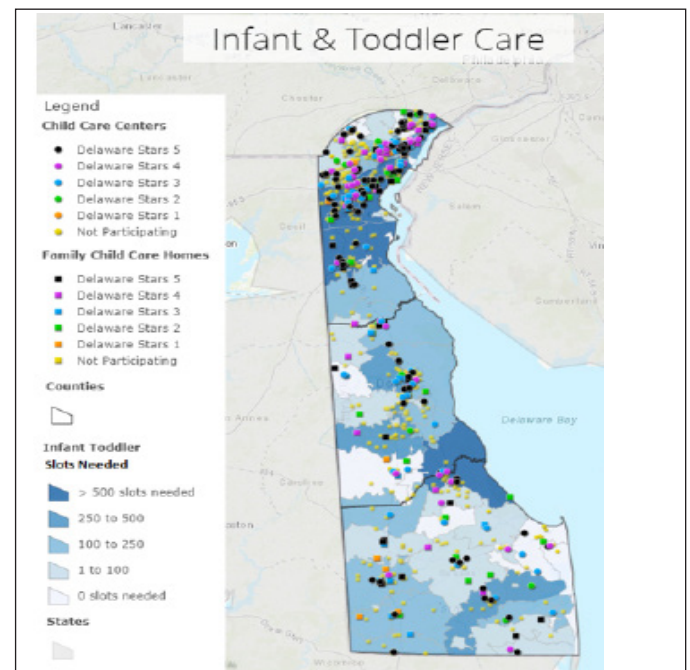
Based on the Delaware team's surveying of providers, we were able to estimate an approximate supply of infant and toddler slots throughout the state by applying this percentage to the licensed capacity.

Demand:

To determine approximate demand, we used the "Census table B13012: Women 16 to 50 Years Who Had a Birth in the Past 12 Months by Marital Status and Labor Force Status, 5-Year Estimates." Using estimates for years 2013-2015, we approximate the number of children under 3 years old in a given zip code. This table was used to approximate the data because the Census does not provide data on for children under 3 years old with parents in the workforce.

Findings

Much like the overall supply and demand deficits across the state, this map shows infant and toddler supply gaps in the same regions where an overall gap in child care supply exists. The blue gradient illustrates the gap in care for infants and toddlers by zip code. The darkest blue shows the zip codes with the largest unmet need for infants and toddlers across the state. The provider locations are broken down based on their QRIS rating in Delaware's Stars program.



Spotlight: Southern New Castle County

In the above map, there is a wide band of dark blue in southern New Castle County (Newark, New Castle, Bear & Middletown) that shows

CONTACT

Phone: : (703) 822-7734

Email: learnmore@usa.childcareaware.org

Website: usa.childcareaware.org

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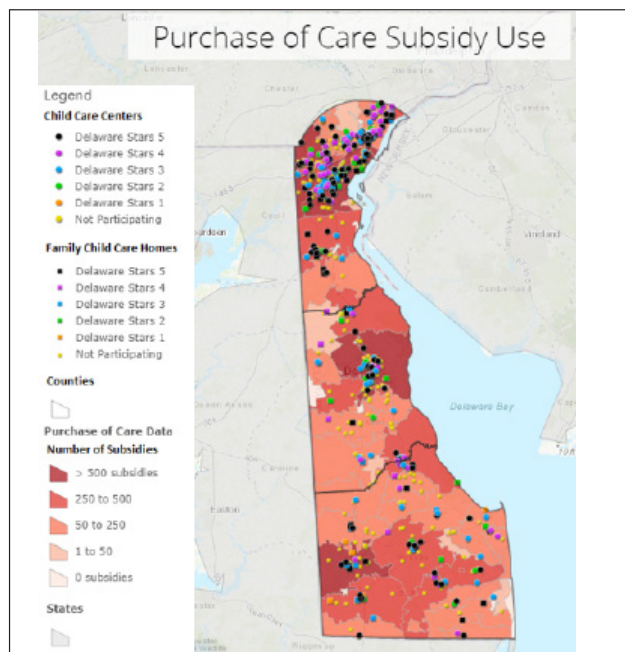


a larger area of unmet needs for infants and toddlers than the rest of Delaware. In recent years, the number of child care centers has increased in this area but due to the continuing development and population growth, including young families, there continues to be unmet needs. subsidy, eligible families may not be receiving assistance paying for child care.

Purchase of Care Subsidy Use

Delaware provides Purchase of Care (POC) subsidies to its low-income families through the Child Care Development Fund (CCDF). However, due to lack of knowledge about the program and the number of providers who accept subsidy, eligible families may not be receiving assistance paying for child care. Many families may be seeking other nontraditional means of child care in their family, friend or neighbor network. Since these nontraditional means are not tracked by the state, several counties with high concentrations of families in urban and rural areas still depict a large unmet need. The data for this map was supplied by Delaware Division of Health and Social Services (DHSS).

The darker the shade of red the more families are using subsidy in the zip code. When you compare the map showing families living 185% below the federal poverty line with the POC subsidy use by zip code, you can see that generally the families that qualify for POC are using it in or around their home zip codes.



Spotlight: Seaford, Sussex County, DE

The above map shows Sussex County, Seaford (zip code: 19973) and the limited quality choices that Purchase of Care eligible families have. While there are 52 providers in this zip code, 41 of them accept POC subsidy. Of these 41 providers only 3 are centers with 1 of the centers caring only for school aged children. This leaves 38 family child care providers that accept POC. Of these 38 providers, 6 are star level 3, 4 or 5, 2 are star level 2 or 1 and 30 providers are not participating in the QRIS system.

Policy Recommendations

Like many states, Delaware families are struggling to find high quality child care. While the gap between high quality and low quality child care still exists across the state, Delaware has made great progress in increasing quality through the implementation of its Delaware Stars Quality Rating System. However, for working families in Delaware, extreme gaps in infant and toddler child care supply can be particularly difficult to overcome, especially for families in our spotlight area of southern New Castle County.

For federal policy recommendations that support child care and working families, see Child Care Aware® of America's 2018 Policy Agenda.

In order to address these gaps and help working families, some next steps should include:

- **Funding designated for early childhood education** – While there has been much progress, Delaware needs to continue to expand enrollment in their QRIS system and incentivize participating providers to increase their star level. This could encourage more providers to enter the market. Enrollment in the QRIS, as well as capacity grants, provides additional funding to providers which could allow them to expand their slots for infant and toddlers. Nearly one in two infant and toddlers in Delaware does not have access to licensed care, leaving working parents without a safe place to take their children while they are at work.
- **Workforce support and recruitment** – Child care providers have a difficult, but extremely important, job caring for the youngest in Delaware. Workforce recruitment, support, and retention efforts should be targeted toward counties with high supply and demand gaps.
- **Monitor the issues** – These maps are a baseline to get a better understanding of what is happening across Delaware. Demand for infant and toddler care may be far out-pacing the current supply. As policy, strategy and funding changes, this unique issue, as well as the overall quality of child care supply in Delaware, should be re-visited to best serve Delaware families.

Child Care Resource & Referral agencies (CCR&Rs) are uniquely positioned to support the study of and address child care supply and demand issues across the state. In fact, CCR&Rs are specifically called out in the Child Care and Development Block Grant (CCDBG) Act of 2014 legislation to help identify supply and demand issues and share information with the state to help target funding to address the issues. An increase in funding for CCR&Rs to do this work is crucial.

The CCR&R agency, Children & Families First Delaware, and staff across Delaware possess a wealth of knowledge about the regional and statewide needs of families, as well as how best to support the provider workforce. However, without funding designated for early childhood education in the state, CCR&Rs may not have the bandwidth to increase the supply of quality, licensed child care providers.

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