Child Care Supply and Demand Report from First Children’s Finance

OLMSTED COUNTY
CHILD CARE MARKET ANALYSIS
PROJECT PROCESS

- Identify Geography
- Data Collection
- Final Analysis
PROJECT SUMMARY

- Supply / Demand / Gap Analysis for Child Care
- Olmsted County
  - Rochester
  - Byron
  - Chatfield
  - Dover
  - Eyota
  - Oronoco
  - Pine Island
  - Stewartville
PROJECT ANALYSIS

- Zip Code Analysis
  + Analysis provides the closest view of available care and expected local demand by zip code

- Area Analysis
  + Looks at included communities within the analysis

- School District Analysis
  + Aligns supply data with school district census totals

- Final Analysis
  + Provides an overview along with Average Gap Analysis
FINAL ANALYSIS SAMPLE

SAMPLE: Child Care Analysis Spectrum

150 School District Analysis Total

-219 Average Gap Analysis Total

-239 Zip Code Analysis Total

-567 Area Analysis Total

©2017 First Children's Finance
HOW IS THE GAP SUPPORTED TODAY?

- Variances (Historical)
- Legal Unlicensed Care
- Un-employment
- Under-employment
- Family, Friends, & Neighbors
- Out of Area Care
SUPPLY / DEMAND / GAP ANALYSIS

Olmsted County, Minnesota

-792
School District Analysis Total

-1396
Average Gap Analysis Total

-1542
Area Analysis Total

-1855
Zip Code Analysis Total
OLMSTED COUNTY - INFLOW/OUTFLOW

Inflow/Outflow Job Counts (Primary Jobs) 2014

<table>
<thead>
<tr>
<th>Count</th>
<th>Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>84,036</td>
<td>100.0%</td>
</tr>
<tr>
<td>26,876</td>
<td>32.0%</td>
</tr>
<tr>
<td>57,160</td>
<td>68.0%</td>
</tr>
</tbody>
</table>

- Employed in the Selection Area
- Employed in the Selection Area but Living Outside
- Employed and Living in the Selection Area

Living in the Selection Area
Living in the Selection Area but Employed Outside
Living and Employed in the Selection Area

Counts:
- 26,876 - Employed in Selection Area, Live Outside
- 15,404 - Live in Selection Area, Employed Outside
- 57,160 - Employed and Live in Selection Area
<table>
<thead>
<tr>
<th>Zip Code</th>
<th>City</th>
<th>CCC #</th>
<th>FCC #</th>
<th>Plus/Minus/Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>55901</td>
<td>Rochester</td>
<td>15</td>
<td>153</td>
<td>-132</td>
</tr>
<tr>
<td>55902</td>
<td>Rochester</td>
<td>6</td>
<td>27</td>
<td>-103</td>
</tr>
<tr>
<td>55904</td>
<td>Rochester</td>
<td>4</td>
<td>68</td>
<td>-520</td>
</tr>
<tr>
<td>55906</td>
<td>Rochester</td>
<td>5</td>
<td>27</td>
<td>-330</td>
</tr>
<tr>
<td>55920</td>
<td>Byron</td>
<td>1</td>
<td>38</td>
<td>-193</td>
</tr>
<tr>
<td>55923</td>
<td>Chatfield</td>
<td>1</td>
<td>3</td>
<td>-190</td>
</tr>
<tr>
<td>55929</td>
<td>Dover</td>
<td>0</td>
<td>1</td>
<td>-78</td>
</tr>
<tr>
<td>55934</td>
<td>Eyota</td>
<td>1</td>
<td>14</td>
<td>66</td>
</tr>
<tr>
<td>55960</td>
<td>Oronoco</td>
<td>0</td>
<td>5</td>
<td>-130</td>
</tr>
<tr>
<td>55963</td>
<td>Pine Island</td>
<td>0</td>
<td>4</td>
<td>-134</td>
</tr>
<tr>
<td>55976</td>
<td>Stewartville</td>
<td>0</td>
<td>35</td>
<td>-111</td>
</tr>
</tbody>
</table>
## Breakout of Identified Full Time Capacity

<table>
<thead>
<tr>
<th>Type of Care</th>
<th>Total #</th>
<th>Max Capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Infants; Toddlers</td>
<td>2</td>
<td>204</td>
</tr>
<tr>
<td>Infants; Toddlers; Preschool</td>
<td>3</td>
<td>236</td>
</tr>
<tr>
<td>Infants; Toddlers; Preschool; School age</td>
<td>20</td>
<td>2338</td>
</tr>
<tr>
<td>Preschool; School age</td>
<td>3</td>
<td>139</td>
</tr>
<tr>
<td>Toddlers; Preschool</td>
<td>2</td>
<td>249</td>
</tr>
<tr>
<td>Toddlers; Preschool; School age</td>
<td>3</td>
<td>322</td>
</tr>
<tr>
<td>Family Child Care</td>
<td>375</td>
<td>4364</td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td><strong>408</strong></td>
<td><strong>7852</strong></td>
</tr>
</tbody>
</table>
OTHER CARE OFFERINGS

- Preschool / Part-time Care
  + 16 Programs
  + 773 slots
  + Generally several hours / day – Other care is needed

- License Exempt Programs (Parent Aware Rated)
  + Head Start
    ✗ 1 Grantee / 4 Individual Sites
  + Public School Based Pre-Kindergarten
    ✗ 5 Districts / 10 Individual Sites
FAMILY CHILD CARE - BY THE NUMBERS

- 375 total providers
- Average length of service: 12 years
- 32% (120) providers with 5 or less years of service
- 24% (89) providers with 20 or more years of service
ADDITIONAL RESOURCES

- Individual Community Summary Overview
- Interactive Licensed Child Care Map
  - [https://drive.google.com/open?id=1L9miPn08IibCT6HQIZXwmhlwFJ8&usp=sharing](https://drive.google.com/open?id=1L9miPn08IibCT6HQIZXwmhlwFJ8&usp=sharing)
- Master Provider List
  - Current list of providers with pertinent information including address and phone number
    - Available from First Children’s Finance by request