

SUBMITTED TO:

Great Falls Development Authority
405 3rd St NW
Great Falls, MT 59404



CHILDCARE DEMAND ASSESSMENT

Great Falls Development Authority

OCTOBER 2021

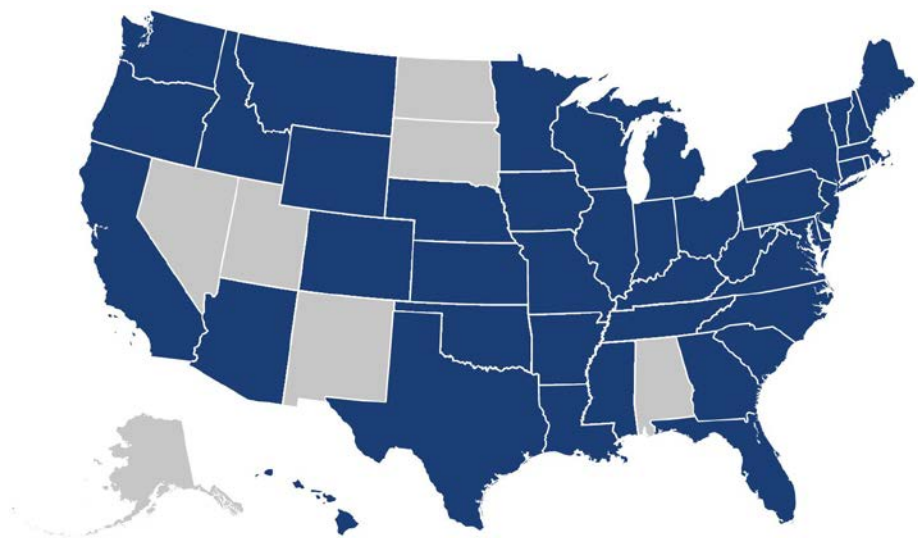
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Camoin Associates has provided economic development consulting services to municipalities, economic development agencies, and private enterprises since 1999. Through the services offered, Camoin Associates has served EDOs and local and state governments from Maine to California; corporations and organizations that include Amazon, Lowes Home Improvement, FedEx, Volvo (Nova Bus) and the New York Islanders; as well as private developers proposing projects in excess of \$6 billion. Our reputation for detailed, place-specific, and accurate analysis has led to over 1,000 projects in 43 states and garnered attention from national media outlets including Marketplace (NPR), Crain's New York Business, Forbes magazine, The New York Times, and The Wall Street Journal. Additionally, our marketing strategies have helped our clients gain both national and local media coverage for their projects in order to build public support and leverage additional funding. We are based in Saratoga Springs, NY, with regional offices in Richmond, VA; Portland, ME; Boston, MA; and Brattleboro, VT. To learn more about our experience and projects in all of our service lines, please visit our website at www.camoinassociates.com. You can also find us on Twitter [@camoinassociate](https://twitter.com/camoinassociate) and on [Facebook](https://www.facebook.com/camoinassociates).

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1. EXECUTIVE SUMMARY

Camoin Associates was commissioned by the Great Falls Development Authority to assess childcare needs in the Great Falls community and determine if a new childcare facility (or facilities) could be supported given current and projected demand and existing availability of childcare in the city. The study examined demographic and socioeconomic trends, existing childcare supply, and childcare demand based on a survey of households with children within and around Great Falls as well as interviews with key childcare stakeholders.

Overall, the research concluded that there is a severe shortage of childcare capacity within the City of Great Falls and the unmet demand can support the addition of multiple new childcare centers. Existing childcare centers within Great Falls are unable to accommodate the existing demand and as a result, have long waitlists. Findings from stakeholder interviews indicate that the workforce in Great Falls is suffering from a lack of childcare with many workers unable to return to work due to lack of childcare while others are utilizing family, friends, and other nontraditional childcare options to fill their needs while they wait for their spot on the waitlist.

Specific key findings of the analysis include:

- **There is estimated childcare center demand (need) for approximately 580 children in the City of Great Falls.** As shown below, an estimated range of demand was estimated for four age groups:

Summary of Great Falls Childcare Center Demand			
	Low	Mid	High
Newborns (up to 12 months)	117	161	205
Toddlers (13-23 months)	88	121	154
Young preschooler (23-35 months)	78	108	137
Preschool (3 to 5 years)	137	188	240
Total	420	578	736

Source: Camoin Associates

- **There is strong interest and demand for a new childcare facility or facilities.** A total of 36% of survey respondents indicated their interest was a 10/10 indicating they would definitely enroll their child(ren) in a new facility, assuming a reasonable cost and location. Another 19% of respondents indicated their interest level was either an 8/10 or 9/10. There is particularly strong interest among those that do not currently have children in a childcare center. Of the survey respondents that indicated their children are not enrolled in a childcare facility, 100% indicated they would definitely enroll their children in a new facility.
- **Desired features of a new childcare facility include:**
 - Flexible arrangements including drop in and hourly options, part-time options, longer hours, and weekend availability
 - Quality staff that can offer a caring and engaging environment for children
 - Educational programming including nutritional awareness and outdoor time
 - Ensured safety using enhanced safety protocols and low student to caregiver ratios

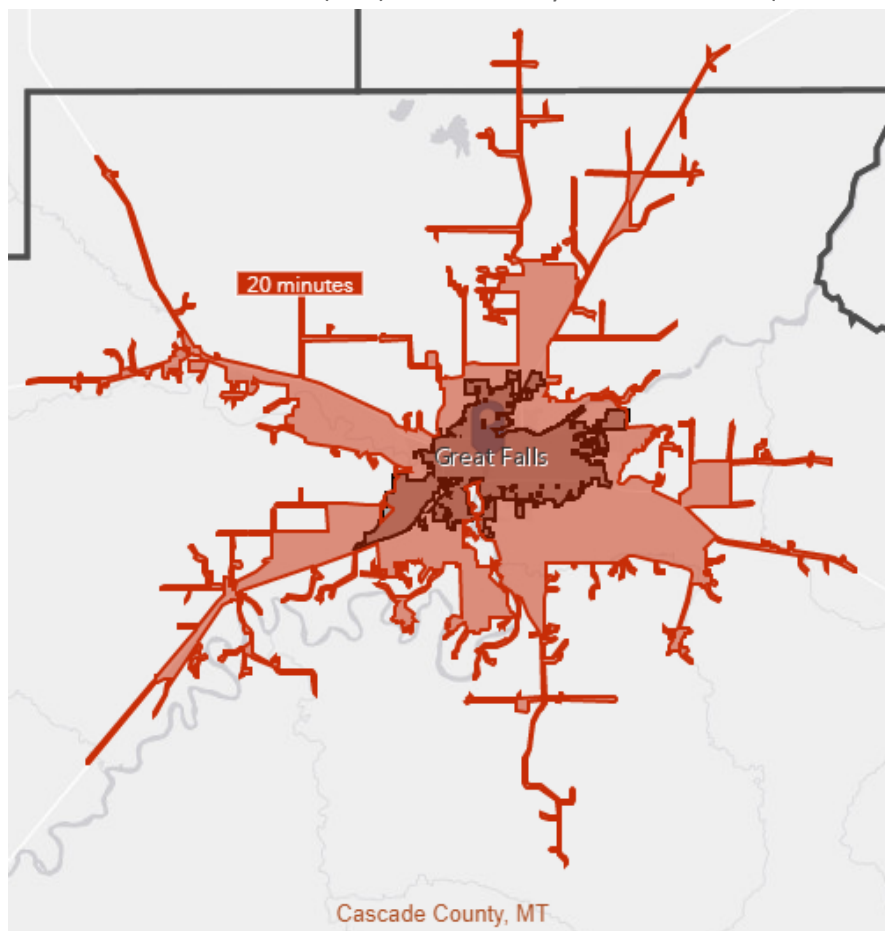
- **Existing Childcare facilities in Great Falls are at capacity and are experiencing very long wait lists.** Interviews conducted for this study found that there is no availability at childcare centers and that wait lists at some centers can be as long as a year or more wait. As an example, one major childcare center in Great Falls has a waitlist of approximately 70 children that would require approximately 54% more capacity to accommodate.
- **Great Falls was experiencing a shortage of childcare facilities prior to the COVID-19, but the pandemic has resulted in a severe shortage.** According to Montana Department of Labor and Industry's Impacts of Child Care on the Montana Workforce, 43% of licensed childcare providers in Montana closed as an immediate response to the COVID pandemic resulting in a significantly reduced childcare capacity. Prior to COVID, 51% of those surveyed as part of this study indicated that it was moderately or very difficult to find childcare arrangements with 11% reporting it very difficult to find childcare. During the pandemic, 74% of survey respondents indicated it was moderately or very difficult to find childcare with 50% reporting it very difficult to find childcare.
- **There is a need for childcare across a spectrum of income levels (price points).** The majority of survey respondents indicated that they would be willing to pay between \$150 and \$299 a week for childcare at a new facility but nearly 20% would pay more. Analysis of existing facilities indicate that the current market rate for childcare facilities is approximately \$40-\$45 per day (equivalent to \$200 to \$250 per week if full time). However, nearly one-third of survey respondents pay more than \$300 per month per child for childcare suggesting that higher price points may be achievable for a new facility. There is also a need for more affordable and/or subsidized childcare to support working families and single parents. Nearly 60% of survey respondents believe they are paying too much for childcare and cost was the most reported thing that survey respondents would change about their current situation.
- **Demand for childcare is expected to grow.** The number of children in the Great Falls region has been trending upwards and there is evidence of a recent increase in the birthrate that will continue to add to the demand for childcare. Many of those expecting to have, adopt, or foster a child in the next five years (50%) would prefer a childcare center for their new child according to survey results. Furthermore, proposed federal legislation in the American Families Plan, if passed, would provide significant financial assistance for childcare, generating new demand from households for which childcare may have previously been unaffordable.
- **Adequate staffing and funding anticipated to be the most significant challenges to establishing new childcare facilities.** Interviews indicated that finding enough qualified staff is already a challenge and likely to pose a challenge for any future new childcare facilities. Childcare entrepreneurs indicated that access to capital is another primary restriction for current operations to expand their capacity.

2. STUDY AREAS

The following market analysis examines the local and regional trends impacting the City of Great Falls, Montana and its childcare sector. The following geographies are considered:

- **City of Great Falls** – Great Falls is the primary geography for the Childcare Feasibility Study. Socioeconomic trends for the city are used to understand the local demand and capacity for childcare.
- **Commuter Shed** – The Commuter Shed for the City of Great Falls is a 20-minute drive time radius from Central Great Falls. This boundary covers the City of Great Falls, Gibson Flats, and Eagle, and extends into parts of Malmstrom, Sun Prairie, Vaughn, Ulm, and San Coulee. This geography is used for the analysis of demographic characteristics that will impact the feasibility of a potential childcare facility.

Great Falls Commuter Shed (red) and the City of Great Falls (black outline)



Source: Esri

- **Cascade County** – The City of Great Falls is located within Cascade County. The county is used to provide regional context on demographic and economic trends surrounding the City of Great Falls.
- **Montana** – The State of Montana is used to provide further regional context for demographic and socioeconomic, economic, and childcare data/trends.

3. DEMOGRAPHIC AND SOCIOECONOMIC ANALYSIS

Demographic and socioeconomic trends within the City of Great Falls and the surrounding region are examined to understand the market demand and potential for a childcare facility.

POPULATION AND HOUSEHOLDS

As of 2020, there are approximately 59,000 people in the City of Great Falls across 26,000 households. Between 2010 and 2020, the population in the City of Great Falls remained largely stagnant whereas the other geographies' population grew at a rate of 0.2% annually for the Commuter Shed and county and 1.1% per year for the state. During that time, the number of households grew minimally in the City of Great Falls. Projections indicate that population and household growth for the City of Great Falls will increase into 2025.

Recent census data indicates that population growth in Great Falls may be even more robust. The Great Falls Metropolitan Statistical Area (Cascade County) grew by 3,087 people from 2010 to 2020 according to new census data, which indicates a 3.8% growth rate. The City of Great Falls grew by 3.3% during this timeframe according to the recent Census data. Therefore, faster population growth will drive an even greater need for childcare services.

Population, 2010 - 2025					
	2010	2020	2025	Annual Growth Rate 2010 - 2020	Annual Growth Rate 2020 - 2025
City of Great Falls	58,599	58,586	59,075	0.0%	0.2%
Commuter Shed	69,608	71,111	71,793	0.2%	0.2%
Cascade County, MT	81,327	82,739	83,424	0.2%	0.2%
Montana	989,415	1,096,002	1,150,056	1.1%	1.0%

Source: Esri

Households, 2010 - 2025					
	2010	2020	2025	Annual Growth Rate 2010 - 2020	Annual Growth Rate 2020 - 2025
City of Great Falls	25,242	25,584	25,892	0.1%	0.2%
Commuter Shed	29,187	30,200	30,602	0.3%	0.3%
Cascade County, MT	33,809	34,854	35,280	0.3%	0.2%
Montana	409,607	456,107	479,467	1.1%	1.0%

Source: Esri

The average household size for the City of Great Falls was 2.24 people and 2.29 people in the Commuter Shed as of 2020, indicating there is a greater presence of children in the Commuter shed compared to the city. The average household size is expected to decline minimally in the City of Great Falls, Commuter Shed, and Cascade County into 2025 and remain stagnant in the state.

Average Household Size, 2020 - 2025				
	2020	2025	Change 2020 - 2025	% Change 2020 - 2025
City of Great Falls	2.24	2.23	(0.01)	(0.4%)
Commuter Shed	2.29	2.28	(0.01)	(0.4%)
Cascade County, MT	2.30	2.29	(0.01)	(0.4%)
Montana	2.34	2.34	0.00	0.0%

Source: Esri

DEMOGRAPHIC SHIFTS

As of 2020, there are approximately 10,400 children under the age of 14 in the City of Great Falls and nearly 13,000 in the Commuter Shed. These children represent the demand pool for childcare services in the area.

Looking forward to 2025, the number of individuals aged 14 years old and younger in the City of Great Falls and the Commuter Shed are expected to increase adding 42 and 37 children, respectively. Within the city, the majority of that growth will be in children aged 10 to 14 and 0 to 4 years old. Within the Commuter Shed, the majority of the growth will be focused on children aged 0 to 4 years old.

It is important to note that population projections are not predictions. Esri models population shifts by projecting past trends into the future and, therefore, represent a baseline case if all factors remain unchanged. The model is not able to take into consideration external factors such as new housing development or job growth.

Based on interviews, the Great Falls area is experiencing a "baby boom" during COVID. This combined with the immigration of young families is anticipated to rise the demand for childcare.

Change in Population by Age Cohort for the City of Great Falls, 2020 - 2025

Age Cohort	2020	2025	Change 2020 - 2025	% Change 2020 - 2025
0 - 4	3,572	3,586	14	0.4%
5 - 9	3,416	3,424	8	0.2%
10 - 14	3,394	3,414	20	0.6%
15 - 19	3,318	3,355	37	1.1%
20 - 24	3,735	3,647	(88)	(2.4%)
25 - 34	8,135	7,782	(353)	(4.3%)
35 - 44	6,917	7,451	534	7.7%
45 - 54	6,570	6,260	(310)	(4.7%)
55 - 64	7,989	7,217	(772)	(9.7%)
65 - 74	5,995	6,788	793	13.2%
75 - 84	3,695	4,183	488	13.2%
85+	1,850	1,967	117	6.3%
Population 14 and Under	10,382	10,424	42	0.4%

Source: Esri

Change in Population by Age Cohort for Commuter Shed, 2020 - 2025

Age Cohort	2020	2025	Change 2020 - 2025	% Change 2020 - 2025
0 - 4	4,528	4,557	29	0.6%
5 - 9	4,209	4,212	3	0.1%
10 - 14	4,185	4,190	5	0.1%
15 - 19	4,070	4,159	89	2.2%
20 - 24	5,037	4,894	(143)	(2.8%)
25 - 34	9,894	9,498	(396)	(4.0%)
35 - 44	8,324	8,893	569	6.8%
45 - 54	7,793	7,461	(332)	(4.3%)
55 - 64	9,566	8,616	(950)	(9.9%)
65 - 74	7,205	8,190	985	13.7%
75 - 84	4,253	4,914	661	15.5%
85+	2,049	2,206	157	7.7%
Population 14 and Under	12,922	12,959	37	0.3%

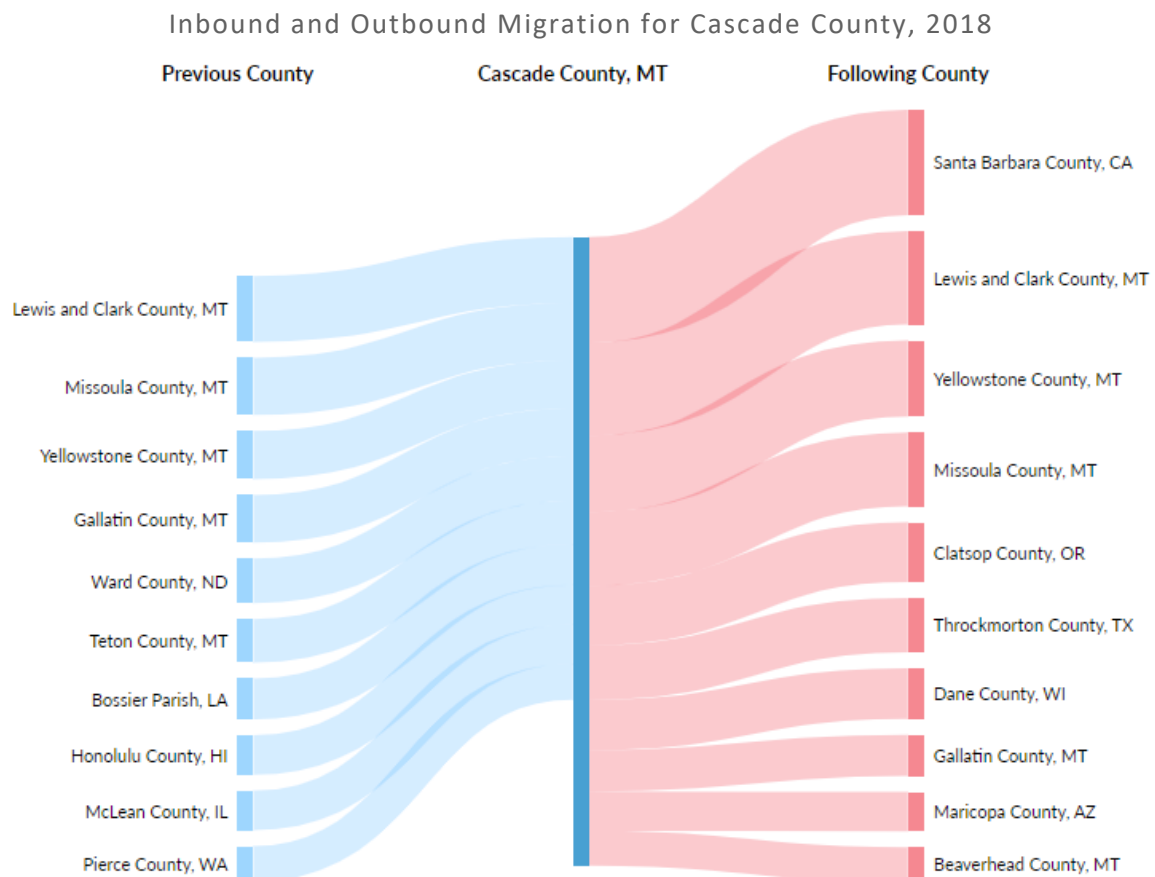
Source: Esri

MIGRATION

We supplement demographic shifts with migration patterns to further understand how the population in the City of Great Falls and the surrounding region will be impacted. The table below analyzes past and current residents of Cascade County, MT. The left column shows residents of other counties migrating to Cascade County, MT. The right column shows residents migrating from Cascade County, MT to other counties.

Overall more people moved out of Cascade County than moved to Cascade County for a net migration of -759 in 2018. The top counties where people are migrating to Cascade County from include Lewis and Clark County, MT; Missoula County, MT; and Yellowstone County, MT. Top counties where people are migrating from Cascade County to include Santa Barbara County, CA; Lewis and Clark County, MT; and Yellowstone County, MT.

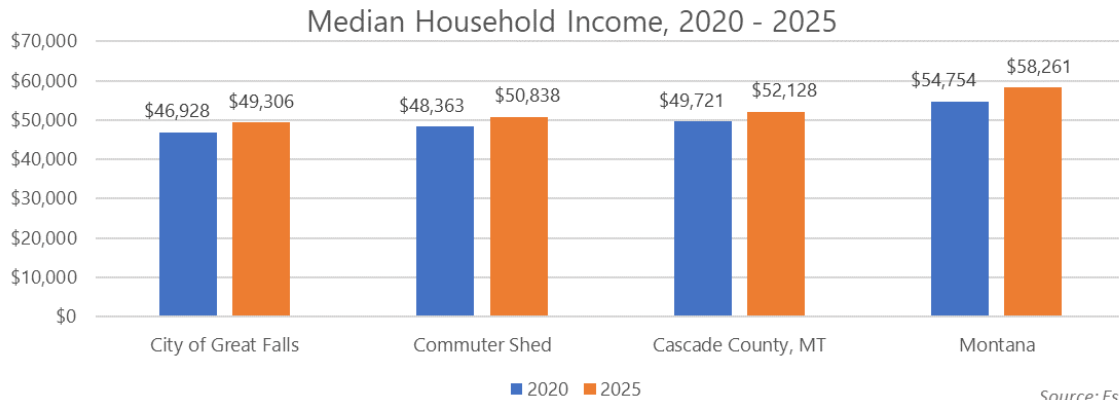
Qualitative information from interviews suggests that the City of Great Falls and the surrounding area has experience an influx of young families during the pandemic.



Source: Emsi

INCOME

As of 2020, the median household income in the City of Great Falls was approximately \$47,000. Compared to the other geographies, the City of Great Falls ranks the lowest with Montana ranking the highest at nearly \$55,000. Looking forward to 2025, incomes across all geographies are expected to rise with incomes in the City of Great Falls, Commuter Shed, and Cascade County expected to rise by 5% and incomes across the state expected to rise by 6%.



Within the City of Great Falls and the Commuter Shed, the number of households earning less than \$35,000 are expected to decline into 2025. In both geographies, households earning between \$150,000 and \$199,999 are expected to grow at the fastest rate in the next years to 2025. Overall, the majority of household growth in the city and Commuter Shed is expected to come from households earning between \$50,000 and \$199,999.

Change in Household Income for the City of Great Falls, 2020 - 2025				
	2020	2025	Change 2020 - 2025	% Change 2020 - 2025
<\$15,000	2,848	2,723	(125)	(4.4%)
\$15,000 - \$24,999	3,132	2,839	(293)	(9.4%)
\$25,000 - \$34,999	3,136	3,120	(16)	(0.5%)
\$35,000 - \$49,999	4,356	4,414	58	1.3%
\$50,000 - \$74,999	4,927	5,055	128	2.6%
\$75,000 - \$99,999	2,526	2,620	94	3.7%
\$100,000 - \$149,999	3,307	3,630	323	9.8%
\$150,000 - \$199,999	572	676	104	18.2%
\$200,000+	780	816	36	4.6%
Total	25,584	25,893	309	1.2%

Source: Esri

Change in Household Income for Commuter Shed, 2020 - 2025				
	2020	2025	Change 2020 - 2025	% Change 2020 - 2025
<\$15,000	3,213	3,054	(159)	(4.9%)
\$15,000 - \$24,999	3,588	3,234	(354)	(9.9%)
\$25,000 - \$34,999	3,661	3,621	(40)	(1.1%)
\$35,000 - \$49,999	5,048	5,083	35	0.7%
\$50,000 - \$74,999	5,888	6,023	135	2.3%
\$75,000 - \$99,999	3,053	3,182	129	4.2%
\$100,000 - \$149,999	4,040	4,476	436	10.8%
\$150,000 - \$199,999	718	863	145	20.2%
\$200,000+	990	1066	76	7.7%
Total	30,199	30,602	403	1.3%

Source: Esri

EMPLOYMENT TRENDS

Understanding employment trends among families within the City of Great Falls and the surrounding region helps to determine the need for childcare. The child dependency ratio is the measure of the number of children (dependents) aged 0-17 compared to the working-class population (individuals aged 18-64). It's used to measure dependent pressure on the working population. The ratio is the highest in the Commuter Shed at 36.1% followed by the county at 36.0%. Child dependency is expected to increase across all geographies with the Commuter Shed and County increasing to 37.4% and 37.5% respectively.

Child Dependency Ratio, 2020 - 2025				
	2020	2025	Change 2020 - 2025	% Change 2020 - 2025
City of Great Falls	35.6%	36.8%	0.01	3.4%
Commuter Shed	36.1%	37.4%	0.01	3.6%
Cascade County, MT	36.0%	37.5%	0.02	4.2%
Montana	34.6%	36.1%	0.02	4.3%

Source: Esri

In Cascade County, 35% of the families have one earner in their household while 39% have two earners. Approximately 18% of families have no earners. This aligns with demographic information for the Great Falls Elementary School District where 16% of parents of the children enrolled at not in the labor force.¹ It is important to note that families with any number of earners can face childcare challenges. Childcare costs may not be financially feasible for adult(s) in the household to work. Households with a single earner can represent single-parent households that seek childcare arrangements to enable them to attend work.

Number of Earners per Family in Cascade County, 2019		
	Number	Percent
No earners	3,744	18.4%
1 earner	7,187	35.3%
2 earners	7,956	39.1%
3 or more earners	1,449	7.1%
Total	20,336	100.0%

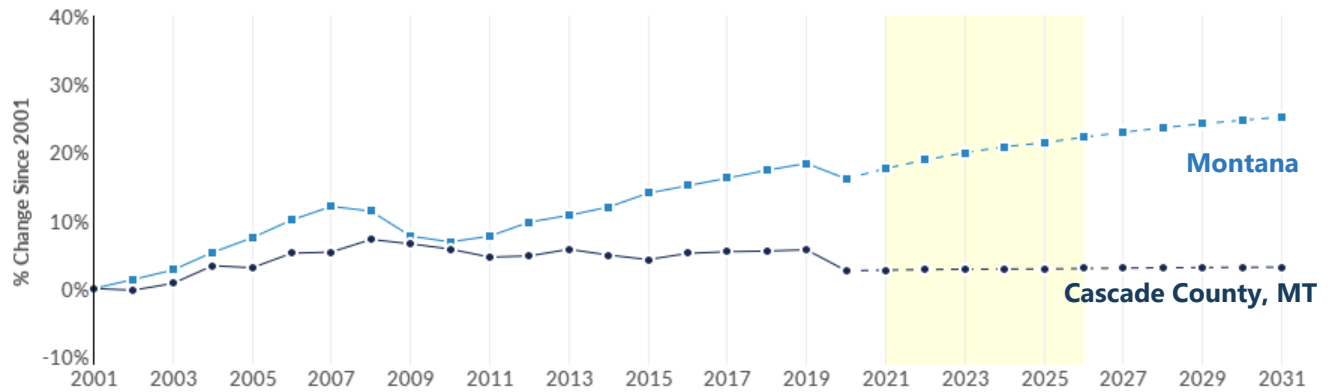
Source: American Community Survey, 1-Year Estimates

The figure below displays the employment growth in Montana and Cascade County from 2001 to 2021 and projected to 2031. Since 2001, job growth in Montana had outpaced Cascade County. The recession in 2008 resulted in a sharper decline across Montana than it did in Cascade County whereas the recent economic downturn

¹ National Center for Education Statistics, Great Falls Elementary School District 2014 - 2018

associated with COVID-19 left resulted in a sharper decline in Cascade County compared to the state. Looking forward, Montana is expected to gain jobs at a faster rate than Cascade County.

Employment Growth, 2001 - 2031



Source: Emsi

As of 2021, there are approximately 42,000 jobs in Cascade County, MT. Between 2016 and 2021, the county shed 1,000 jobs for a decline of 2%. Much of that decline was centered in Retail Trade and Accommodation and Food Services which shed 465 and 369 jobs respectively. Nationally, these two industries were most deeply impacted by the COVID-19 downturn. During that time, Health Care and Social Assistance added 315 jobs for a growth of 4%. This industry has higher than average earnings at \$62,000 compared to \$54,000 per job across the county. Benefits Hospital is a top employer by the number of jobs and has actively posted for available positions within the last year making it one of the top posting companies in the county. Administrative and Support and Waste Management and Remediation Services was another top growing industry between 2016 and 2021, adding 297 positions for a growth of 17%.

Looking forward to 2026, Cascade County can expect to remain largely stagnant by adding nearly 100 jobs. Health Care and Social Assistance and Administrative and Support and Waste Management and Remediation Services are anticipated to continue adding jobs adding 402 and 174 respectively. These job gains are hindered by continued declines in Retail Trade, Government, and Information.

Cascade County Jobs by Industry, 2016 - 2026									
NAICS	Description	2016 Jobs	2021 Jobs	2026 Jobs	2016 - 2021 Change	2016 - 2021 % Change	2021 - 2026 Change	2021 - 2026 % Change	Avg. Earnings Per Job
11	Agriculture, Forestry, Fishing and Hunting	630	492	424	(137)	(22%)	(69)	(14%)	\$40,960
21	Mining, Quarrying, and Oil and Gas Extraction	22	11	13	(10)	(49%)	2	17%	\$35,232
22	Utilities	172	169	155	(3)	(2%)	(14)	(8%)	\$120,124
23	Construction	2,646	2,663	2,568	17	1%	(95)	(4%)	\$61,004
31	Manufacturing	1,308	1,202	1,220	(106)	(8%)	18	2%	\$74,900
42	Wholesale Trade	1,395	1,418	1,406	24	2%	(13)	(1%)	\$63,770
44	Retail Trade	5,232	4,767	4,544	(465)	(9%)	(223)	(5%)	\$37,750
48	Transportation and Warehousing	1,291	1,290	1,298	(1)	(0%)	8	1%	\$63,738
51	Information	535	268	171	(267)	(50%)	(98)	(36%)	\$61,922
52	Finance and Insurance	1,826	1,877	1,837	51	3%	(40)	(2%)	\$79,478
53	Real Estate and Rental and Leasing	438	491	496	53	12%	5	1%	\$44,026
54	Professional, Scientific, and Technical Services	1,427	1,429	1,435	2	0%	6	0%	\$70,245
55	Management of Companies and Enterprises	205	208	222	3	1%	14	7%	\$102,593
56	Administrative and Support and Waste Management and Remediation Services	1,765	2,062	2,236	297	17%	174	8%	\$41,224
61	Educational Services	678	593	590	(85)	(13%)	(3)	(1%)	\$29,885
62	Health Care and Social Assistance	6,949	7,253	7,655	305	4%	402	6%	\$62,112
71	Arts, Entertainment, and Recreation	1,068	942	985	(126)	(12%)	43	5%	\$22,082
72	Accommodation and Food Services	3,979	3,610	3,671	(369)	(9%)	61	2%	\$20,840
81	Other Services (except Public Administration)	2,045	1,996	2,031	(49)	(2%)	35	2%	\$32,239
90	Government	9,378	9,235	9,114	(144)	(2%)	(121)	(1%)	\$65,145
99	Unclassified Industry	<10	<10	14	Insf. Data	Insf. Data	Insf. Data	Insf. Data	Insf. Data
Total		42,989	41,986	42,082	(1,003)	(2%)	96	0%	\$54,038

Source: Emsi

CHILD DAY CARE SERVICES INDUSTRY

As of 2021, The Child Day Care Services industry employs 437 people in Cascade County and 4,487 people throughout Montana. Employment in this industry declined nearly 12% in Cascade County and 6% in Montana in 2020 due to COVID-related closures, stay at home mandates, and health and safety protocols. It is important to note that the Child Day Care Services industry was growing moderately in Cascade County and Montana at rates of 2% and 6%, respectively in the years prior to the pandemic (2015 to 2019). Average earnings per job are approximately \$24,000 in Cascade County, paying higher than the state average of \$23,098. Both the state and county fall below national earnings for this industry of \$28,000 per job.

Child Day Care Services Industry						
	2016 Jobs	2021 Jobs	2016 - 2021 Change	2016 - 2021 % Change	Average Earnings 2020	Payrolled Business Locations 2020
Cascade County, MT	522	437	(85)	(16%)	\$24,023	30
Montana	4,822	4,487	(335)	(7%)	\$23,098	497

Source: Emsi

In terms of labor, the Child Day Care Services is predominately female at 90%. Workers span a variety of ages with nearly a quarter of workers falling between 25 to 34 years old. It should be noted that approximately 21% of

childcare workers are over the age of 55 and may therefore be retiring in the near future, which would further constrain the availability of trained childcare staff.

Child Day Care Services Workforce by Age, 2020

Age	2020 Jobs	2020 Percent
14-18	38	8.5%
19-24	76	17.0%
25-34	104	23.3%
35-44	62	13.9%
45-54	73	16.3%
55-64	71	15.9%
65+	23	5.1%

Source: Emsi

SCHOOL ENROLLMENT

The tables below display the public and private school enrollment for children aged three and older in Great Falls for 2015 and 2019. Across all age categories, public school is the predominant enrollment choice. As of 2019, there were 812 children enrolled in preschool in Great Falls. Of those children, 62.4% attended public nursery school and 37.6% attended private nursery/preschool. Approximately 825 children were enrolled in kindergarten with 89.5% of them enrolled in public school and 10.5% enrolled in private school. Since 2015, the number of children in preschool has increased by approximately 44 while kindergarten has declined by 77 students.

School Enrollment in Great Falls, 2019						
	Total		Public School		Private School	
Nursery school, preschool	812	6.2%	507	62.4%	305	37.6%
Kindergarten to 12th grade	9,228	70.8%	8,399	91.0%	829	9.0%
Kindergarten	825	6.3%	738	89.5%	87	10.5%
Elementary: grade 1 to grade 4	2,827	21.7%	2,616	92.5%	211	7.5%
Elementary: grade 5 to grade 8	2,921	22.4%	2,651	90.8%	270	9.2%
High school: grade 9 to grade 12	2,655	20.4%	2,394	90.2%	261	9.8%
College, undergraduate	2,563	19.7%	2,045	79.8%	518	20.2%
Graduate, professional school	423	3.2%	319	75.4%	104	24.6%
Population 3 years and over enrolled in school	13,026			86.5%		13.5%

Source: American Community Survey, 5-Year Estimate

School Enrollment in Great Falls, 2015						
	Total		Public School		Private School	
Nursery school, preschool	768	5.8%	513	66.8%	255	33.2%
Kindergarten to 12th grade	8,963	68.1%	8,401	93.7%	562	6.3%
Kindergarten	902	6.9%	854	94.7%	48	5.3%
Elementary: grade 1 to grade 4	3,069	23.3%	2,947	96.0%	122	4.0%
Elementary: grade 5 to grade 8	2,680	20.4%	2,448	91.3%	232	8.7%
High school: grade 9 to grade 12	2,312	17.6%	2,152	93.1%	160	6.9%
College, undergraduate	2,819	21.4%	2,310	81.9%	509	18.1%
Graduate, professional school	614	4.7%	452	73.6%	162	26.4%
Population 3 years and over enrolled in school	13,164			88.7%		11.3%

Source: American Community Survey, 5-Year Estimate

COMMUTER TRENDS

According to Esri, the average commute time for workers ages 16 and older in the City of Great Falls is 14.1 minutes compared to Cascade County's average of 15.9 minutes and Montana's average of 18.3 minutes. Nearly 81% of Great Falls residents that work are captured within a 20 minute drive time.

The following information details data of where Great Falls residents work and where Great Falls workers live that informed the Commuter Shed geography.

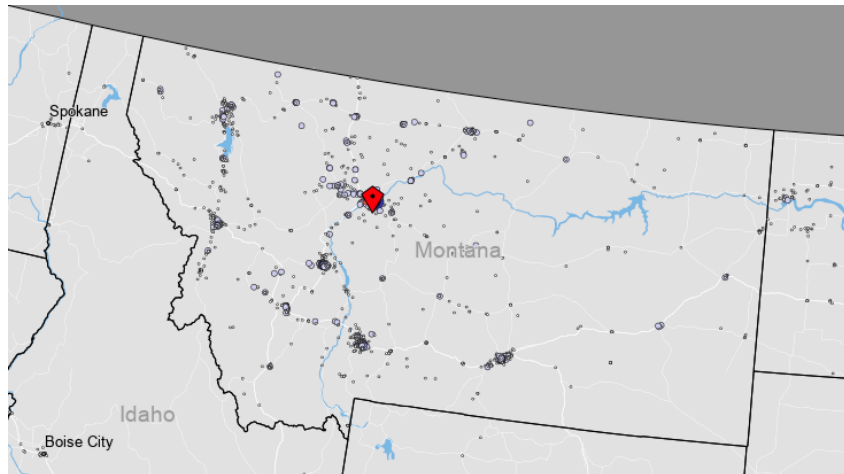
Commuting Data for Workers Aged 16 +, 2019				
	City of Great Falls	Commuter Shed	Cascade County, MT	Montana
Average Commute to Work (Minutes)	14.1	NA	15.9	18.3
15-19 Minute	28.6%	27.4%	25.6%	19.5%
10-14 Minutes	29.8%	27.3%	24.9%	20.2%
5-9 Minutes	19.8%	19.4%	18.4%	18.9%
< 5 Minutes	2.7%	3.7%	3.9%	7.6%
Total Percent within < 20 minutes	80.9%	77.7%	72.8%	66.2%

Source: Esri

WHERE GREAT FALLS RESIDENTS WORK

Based on commuter data from the U.S. Census Bureau, the majority (77.3%) of Great Falls residents work within 10 miles of their home. Two-thirds of Great Falls residents work within the City of Great Falls. Nearby communities such as Black Eagle and Malmstrom are also locations where residents work with 1% of resident workers. Approximately 20% of residents travel over 50 miles to work to places such as Helena, MT; Billings, MT; Bozeman, MT, and Missoula, MT.

Where Great Falls Residents Work



Source: Census OnTheMap

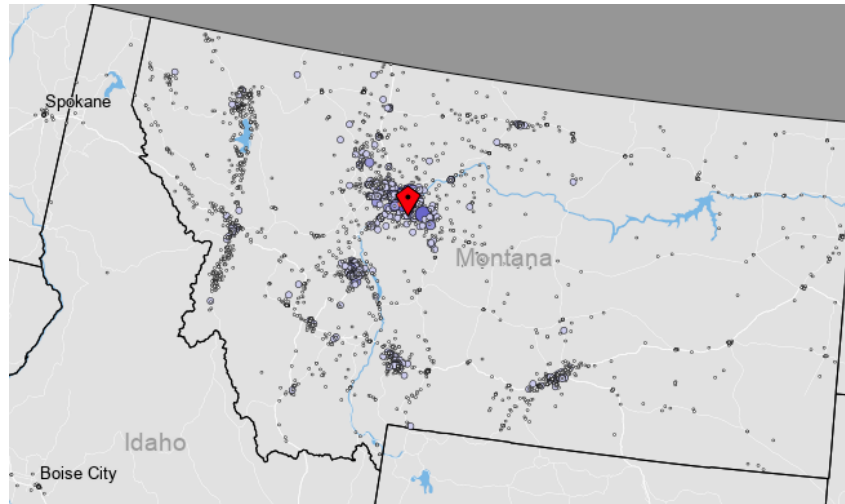
City of Great Falls Residents Distance to Work, 2018		
Distance	Count	Percent
Less than 10 miles	18,763	77.3%
10 to 24 miles	230	0.9%
25 to 50 miles	280	1.2%
Greater than 50 miles	5,014	20.6%
Total	24,287	100.0%

Source: Census OnTheMap

WHERE GREAT FALLS WORKERS LIVE

Nearly 61% of Great Falls workers also live in Great Falls. Less than 2% of workers live within Billings, Sun Prairie, Helena, Bozeman, Butte-Silver Bow, Missoula, Black Eagle, Malmstrom, Harve City, and other locations. Approximately 72% of workers in the City of Great Falls live less than 10 miles away. Of the workers that travel over 50 miles to home live in Billings, Helena, Bozeman, Harve, etc.

Where Great Falls Workers Live



Source: Census OnTheMap

City of Great Falls Workers Distance to Home, 2018

Distance	Count	Percent
Less than 10 miles	19,247	72.4%
10 to 24 miles	1,268	4.8%
25 to 50 miles	667	2.5%
Greater than 50 miles	5,398	20.3%
Total	26,580	100.0%

Source: Census OnTheMap

The following table displays the daytime population of workers and residents for the geographies. These figures are not mutually exclusive meaning residents that also work in the geography are counted as both a resident and worker. Within the Commuter Shed, there are 34,678 daytime workers and 38,573 residents.

Daytime Population, 2020

	Workers	Residents
City of Great Falls	27,596	32,195
Commuter Shed	34,678	38,573
Cascade County, MT	37,489	45,124
Montana	498,186	592,509

Source: Esri

4. INVENTORY OF CHILDCARE FACILITIES

The following is a list of childcare facilities in Great Falls, MT. According to Montana Early Child Service Bureau, there are 67 childcare facilities with a total capacity of 2,531 children up to 12 years old. There is a total capacity among these providers to provide care for up to 458 children under the age of two. These childcare providers in Great Falls are broken into the following three categories:

- **Childcare Centers** – Childcare centers are larger facilities typically divided into groups/classrooms of similarly aged children. In Great Falls, there 39 are childcare centers totaling a capacity for 2,255 children under the age of 12 and a capacity for 329 children under the age of two.
- **Family Childcare** – Family childcare occurs in a residential setting where providers care for small groups of children with low child to provider ratios. In Great Falls, family providers can be licensed with the capacity for up to six children. There are 10 family providers in Great Falls with a capacity for up to 60 children of which 27 is for children under two years old.
- **Group Childcare** – Group childcare providers care for up to twelve children at a time in a residence. There are 18 are group providers in Great Falls with a capacity of 216 children and 102 under two.

It is important to note that unlicensed childcare providers are not included in the capacity below.

Childcare Centers in Great Falls, MT					
Provider Name	Address	License Capacity	License Children Under 2	License Youngest Child Age	License Oldest Child Age
Head Start Day Care/Opportunities Inc.	1220 3rd Ave. S.	150	0	0	5
Opportunities Headstart McKinley	1617 6th Avenue N	130	9	0	12
Play 'N' Learn Academy	4241 2nd Ave N	130	52	0	12
St Thomas Child Family Center/South	1710 Benefis Ct	120	48	1	10
Little Learners Academy	1818 19th Avenue South	80	16	0	12
TLC Center- MSU / Elizabeth Olson	1900 23rd St S	80	32	0	12
Wee Disciples	1226 1st Ave N	80	16	1	5
Ursuline Day Care	2300 Central Ave	76	0	0	12
Hands/Meadowlark Elementary School	2204 Fox Farm Road	75	0	4	12
Superior Children's Center	2000 26th Street South	66	16	0	6
Hands/Lincoln Elementary School	625 27th Street South	65	0	0	12
EduCare Preschool & Childcare	819 6th ST S	60	16	5	12
TLC Center / Elizabeth Olson	1009 18th Ave SW	60	0	0	12
Leap Ahead Learning Center	905 Cresent Drive	60	16	0	12
Hands/Sacajawea Elementary School	630 Sacajawea Dr	60	0	5	12
The Next Best Thing	207 Smelter Ave NE Suite 5	60	16	5	12
Hands/Sunnyside School	1800 19th St S	55	0	5	12
Hands/Lewis & Clark Elementary School	3800 1st Ave S	50	0	5	12
Hands/Riverview Elementary School	100 Smelter Ave	50	0	5	12
Hands/Valley View School	900 Avenue A Nw	50	0	5	12
Hands/Morningside School	4119 7th Ave N	50	0	5	12
Play N Learn PreSchool & Daycare Inc.	5115 3rd Ave S	48	0	5	12
A Child's World / Kathy Taylor	801 2nd Avenue North	48	8	5	12
Holy Spirit Extended Care	2820 Central Ave	45	0	5	12
Robyn's Nest Daycare / Robyn Brantner	700 10th ST S	42	8	5	12
Opportunities Inc.- Early Head Start	1200 3rd Ave. S.	40	16	5	12
Hands / Giant Springs Elementary School	520 32nd St N	40	0	5	12
Hands/West Elementary School	1205 1st Ave NW	40	0	5	12
Hands/Chief Joseph School	5305 3rd Ave S	40	0	0	12
Hands/Mountain View School	3420 15th Ave S	40	0	3	7
Schoolhouse Preschool And D/C	626 1st Ave. South	40	12	0	4
The Walk Preschool and Daycare	1601 2nd Ave N	36	12	3	12
Hands/Loy Elem School	501 57th St N	35	0	2	5
Robyn's Nest Site #2 / Robyn Brantner	1225 9th Ave S	32	8	0	12
Agape Child and Family Care Center	1727 2nd Ave S	30	3	0	12
Young Parents Education Center	2400 Central Avenue	30	24	0	12
Stacie Lynn Olson / Kidz Kreations	1320 9th St S	22	1	0	12
Peace Place After School Program	3300 3rd Strret NE	20	0	0	8
Hands/Whittier School	305 8th Street North	20	0	0	12
Total		2,255	329		

Source: Montana Early Childhood Service Bureau

Family Childcare Facilities in Great Falls, MT					
Provider Name	Address	License Capacity	License Children Under 2	License Youngest Child Age	License Oldest Child Age
Karlee Ann Tchida	1700 2nd Ave S	6	0	2	6
Samantha Ferguson / Miles of Smiles	8 1/2 Eden Park Ln	6	3	0	12
Nicole Marie Pepe / Little Skies	782 33rd A Ave NE	6	3	0	10
Ashley R Dorr / A Child's Haven	2605 3rd Ave N	6	3	0	12
Cynthia Baker	500 Montana Ave Nw	6	3	0	12
Kim Brooks / Little Darlins' Daycare	4500 Peregrine Court	6	3	0	10
Kathy Whitish / Little Halo's Childcare	901 14th St SW	6	3	0	12
Diana L Kundey	1401 Avenue B Nw	6	3	0	12
Colleen's Cuddlebugs	714 42 A St N	6	3	0	12
Lil Rascals-Marni Spragg/Marcia Wanner	3805 7th St Ne Trlr 101	6	3	0	12
Total		60	27		

Source: Montana Early Childhood Service Bureau

Group Childcare Facilities in Great Falls, MT					
Provider Name	Address	License Capacity	License Children Under 2	License Youngest Child Age	License Oldest Child Age
Brenda Kueffler/Oodles of Fun Preschool	3216 3rd Ave N	12	6	0	6
Peace Place Inc.	1315 Central Ave	12	6	0	12
Nichole Davalos / Adventure Awaits	313 Skyline Dr. NE	12	6	0	12
Jill Skinner/ Ms. Jill's Place	1825 6th St NW	12	6	0	12
Inga Davis / Wee Amigos	815 3rd Ave South	12	6	0	12
Sunshine Montessori/Wendy Tedford	809 42A Street North	12	6	0	10
Whitney Lynn Hayes / B's Haven	5510 6th Ave S	12	6	0	12
Gloria Mae Davis	2716 1st Ave N	12	6	0	12
Jennie Yates	3300 13th Ave S	12	6	0	12
Judith E Meyer	683 Sacajawea Dr	12	6	0	12
Great Beginnings Child Care	708 50th St S	12	6	0	12
Our Lady of Lourdes Extended Care	1305 5th Ave S	12	0	2	12
Just For Kids Too	246 21st Ave NW	12	6	0	12
Doris Johanna Rocheleau	1132 Avenue C Nw	12	6	0	12
Crystal Brown/Let's Go C.C./Preschool	1749 Park Garden Rd	12	6	0	5
Just 4 Kids Day Care / Leslie Alexander	244 21st Ave NW	12	6	0	12
Anna Kraus / Wee Care	8 Eden Park Lane	12	6	0	12
Adventurous Learning Place/ K. Lorang	2009 5th Ave S	12	6	0	5
Total		216	102		

Source: Montana Early Childhood Service Bureau

CHILDCARE CENTER RATES

For this study, our focus is on building capacity through the development and/or expansion of childcare centers. Based on a review of existing facilities and interviews with childcare stakeholders, general costs for childcare centers in Great Falls range from \$40-45 per day for children under two years old, \$30-45/day for children two to three years old, and \$30-40 for children older than four. Rate information was publicly available for the following centers:

Childcare Demand by Age Cohort	
Childcare Center	Rates
Play 'N' Learn Academy	\$45/Day Under 2.5 years old; \$40/day age 2.5 to 10
TLC Center- MSU / Elizabeth Olson	\$42.50/day full-time under 11 months; \$40/day full-time 12-23 months; \$36.25/day for 3-4 year olds; \$35/day for 4+ year olds
Wee Disciples	\$900/month under 2.5 years old; \$775/month age 2.5 +
Little Learners Academy	\$595/month all day preschool; various for part-time options

Source: Rates posted on each center's website

CHILDCARE CENTER WAIT LISTS

According to Family Connections, all childcare facilities and home providers in Great Falls have a waitlist as of Summer 2021.² Lack of adequate available childcare is inhibiting Great Falls workers from returning to work. Childcare facilities are facing challenges obtaining qualified childcare workers. Great Falls Development Authority estimates that at least 200 children are currently on waitlists for childcare.

Research conducted as part of this study also found the following wait list for two childcare centers that are representative of the robust unmet demand for childcare in the City of Great Falls.

- **Play 'N' Learn**, with a capacity of 130 children has a waitlist of 70 children. The wait list is currently greater than two years for toddlers. The facility has had a waitlist since it first opened.
- **TLC** also has a waitlist but limits the number kept on their list. The facility reports receiving calls ever day for spots. It is typical for families to get on their waitlist as soon as they become pregnant to secure newborn spots.

² https://www.montanarightnow.com/great-falls/childcare-facilities-in-gf-all-have-a-wait-list-new-survey-assessing-the-need-for/article_b4be26c6-e8d8-11eb-b087-8b43b03b3aff.html

5.DEMAND AND FEASIBILITY

Demand and feasibility for increased childcare capacity in Great Falls was determined through a community survey, stakeholder interviews, and review of previous childcare studies/reports including:

- Montana's Child Care Crisis: An Overview of Barriers and Solutions for Providing Affordable, High-Quality Child Care
- Montana Department of Labor and Industry's Impacts of Child Care on the Montana Workforce
- Bureau of Business and Economic Research's Impact of Inadequate Child Care on Montana's Families, Employers and Economy
- Enhance's Essential Child Care Needs COVID-19 and Beyond

Based on previous reports, the licensed childcare capacity in Montana falls approximately 40 to 47% short of current demand and there are a number of changes that can be implemented to build capacity.

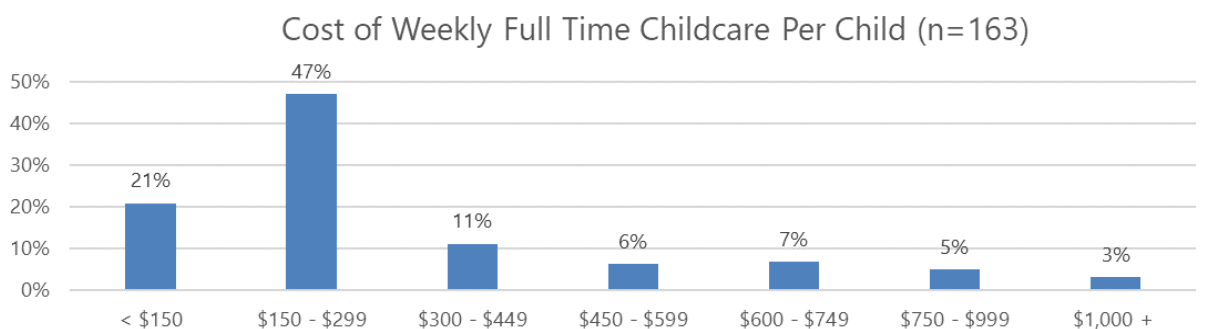
COMMUNITY SURVEY

To understand childcare demand in Great Falls, Camoin Associates conducted a digital survey to assess current childcare arrangements and demand and stakeholder interviews with local childcare facilities, human resource experts, and government departments. A total of 308 participants provided input in the Great Falls Childcare Demand Survey from July 16th, 2021 to August 20th, 2021. All of those respondents completed the survey in its entirety with some respondents skipping select questions.

Overall, 51% of survey respondents indicated that it was moderately difficult or very difficult to find childcare arrangements before the COVID-19 pandemic. The pandemic made finding childcare arrangements increasingly difficult where nearly three-quarters (74%) of respondents indicated it was moderately difficult or very difficult. The pandemic resulted in many families adjusted their childcare arrangements including altering work and family schedules to accommodate lessened schedules at childcare providers and in some cases closed facilities.

Currently, childcare arrangements for families in Great Falls are skewed toward childcare facilities with 56% of respondents indicating that's their current arrangements. Looking forward, 40% of respondents indicated that they anticipate their childcare arrangements will change in the next few months.

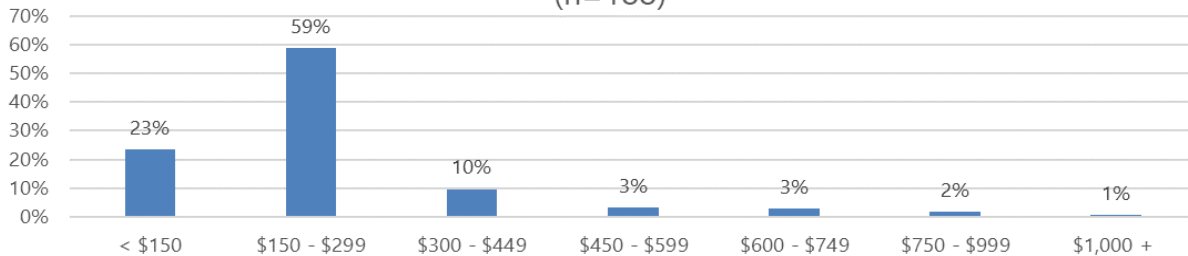
Full time childcare rates for childcare in and around Great Falls are provided below. Approximately, 47% of survey respondents are paying between \$150 to \$299 a week. Part time rates range from \$4 to \$33 an hour, \$25 per child per day, and \$90 to \$350 per week. Overall, the majority (58%) of surveyed families believe they are spending too much on childcare.



Source: Camoin Associates

Few survey respondents are willing to pay more for a new childcare facility in Great Falls, with the majority of respondents selecting a maximum weekly rate per child between \$150 and \$299. Approximately 59% indicated they would be willing to pay between \$150 and \$299 with 34% of respondents indicating they were willing to pay between \$200 and \$250 a week.

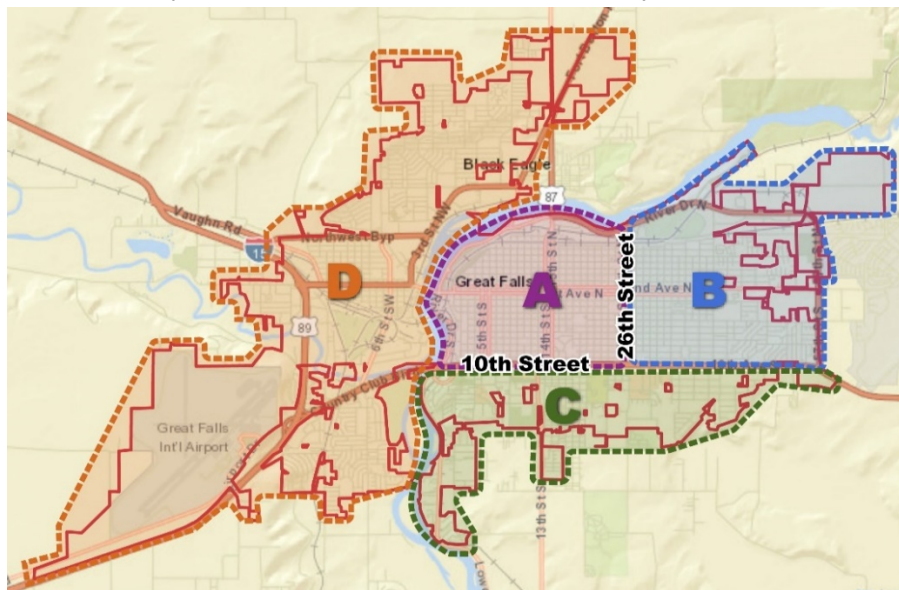
Maximum Weekly Rate Per Child for a New Facility in Great Falls
(n=188)



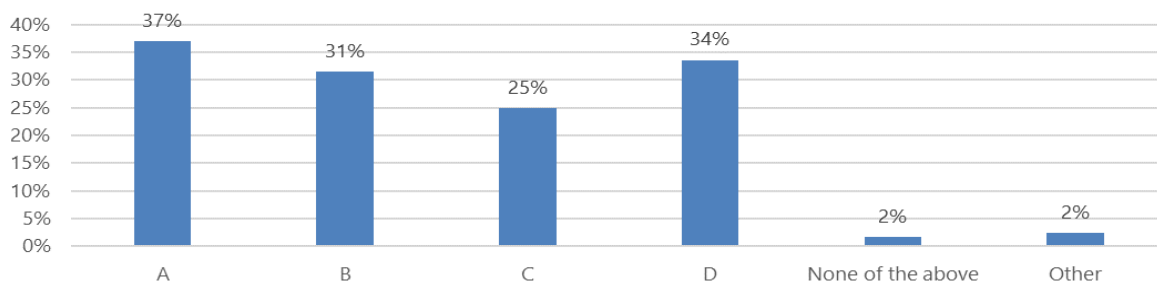
Source: Camoin Associates

The City of Great Falls was divided into 4 sections, A, B, C, and D in the map below to examine the demand for a new childcare facility. The greatest demand for a new facility was in section A with 37%, followed by D with 34%, and B with 31%. Stakeholder interviews indicated there would be strong demand for a new childcare facility in the east side of Great Falls due to lack of current supply.

Proposed Great Falls Childcare Facility Locations



Preferred Locations for a New Childcare Facility in Great Falls (n=289)



Source: Camoin Associates

DEMAND POTENTIAL SUMMARY

Demand potential for childcare in Great Falls was determined based on survey results and local demographics provided by the American Community Survey. To determine demand we applied the percentage of households that would enroll in a new center based on survey results for the survey question that asked respondents to rate their interest in a new childcare facility in Great Falls with reasonable cost and location from 0, would not enroll to 10, would enroll. The low case scenario considers only households that would enroll (10 rankings) while the high case scenario accounted for the households that indicated they were highly likely to enroll (7-10 ranking). To account for net new demand, these households were applied to the percentage of households with young children who would definitely enroll in a new center and are not currently enrolled in a childcare facility or group childcare (38%). The number of children in need of spots is based on the number of children per household provided in the survey.

The total number of children in need of childcare spots in Great Falls ranges from 420 to 736 with the greatest demand for 3- to 5-year-old spots and newborn spots. Under the low case scenario, there is enough unmet demand in Great Falls to support 117 newborns, 88 toddlers, 78 young preschoolers, and 137 preschoolers. Under the high case demand there is unmet demand to support 205 newborns, 154 toddlers, 137 young preschoolers, and 240 preschoolers.

Childcare Demand Estimates by Age Cohort		
	Low Case	High Case
Households with children under 6 years old	2,787	2,787
Percent of households that would enroll in a new center	36%	63%
Households that would enroll in new center	1,003	1,756
Percent of households that would enroll and are not currently enrolled anywhere	38%	38%
Number of households that would enroll and are not currently enrolled anywhere	381	667
Demand by number of children and age range		
Newborns (up to 12 months)	117	205
Toddlers (13-23 months)	88	154
Young preschooler (23-35 months)	78	137
Preschool (3 to 5 years)	137	240
Total net demand for childcare facilities in Great Falls (number of children)	420	736

Source: Camoin Associates, American Community Survey, Childcare Demand Survey

CHILDCARE CENTER DEVELOPMENT CHALLENGES

Current challenges to childcare facilities are detailed below. These challenges provide insight into the structure and resources a new facility should consider for the Great Falls market.

- **Staffing shortages are a major limitation to current operations** – Nationally, labor shortages are impacting all industries with childcare being a labor barrier further perpetuating the labor shortage. Survey respondents indicated their childcare arrangements have been negatively impacted by lack of workers, quarantined staff, and closures. Ability to find qualified staff may be a challenge for a new facility. Stakeholders indicated that current stockpiles of substitute teachers for childcare are hard to find and that efforts are underway to create a substitute pool through Family Connections. Additionally, ways to

mitigate childcare staff burnout will need to be incorporated to reduce staff turnover in a new facility. This is a problem likely to impact a new facility.

- **Funding is critical** - Stakeholder interviews noted access to capital is a primary restriction for current childcare entrepreneurs to secure licensing or expand their capacity. Funding available for growing childcare operators can help to alleviate financial pressure and bring childcare capacity to the market quickly. Additionally, funding can be provided to assist potential home providers in getting their homes up to standards to further build capacity.
- **Lower barriers to entry for families to obtain quality childcare** – Working families in Great Falls are often priced out of obtaining Best Beginning Child Care Scholarships because they make too much. Lowering the threshold for these scholarships can help to provide working families with adequate assistance. Nationally, the American Families Plan potential federal legislation would work to close this gap. If passed, it aims to support families with childcare needs through a tax credit that would provide families with a total of \$4,000 for one child or \$8,000 for two or more children. Surveyed respondents indicated that 34% would change their childcare needs and the likelihood of using a new facility if the legislation were to pass.

CHILDCARE CENTER DEVELOPMENT OPPORTUNITIES

Based on the survey results and stakeholder interviews, the following represent opportunities to support a new childcare facility in Great Falls along with aspects for success.

- **High demand for childcare can support new facilities in Great Falls** – There is strong demand for childcare in Great Falls with stakeholders noting that every facility in Great Falls has a waitlist. Several interviewees expressed that demand in Great Falls largely outweighs current capacity and that an additional facility would be sustained. Others went so far as to indicate that a new facility would be filled before opening if they properly advertised as current facilities have extensive waitlists. Across Montana, the workforce is suffering from lack of childcare capacity with 44% of families indicating they have missed a full day of work due to inadequate child care with the primary burden placed on families with children under 5.³ Lack of childcare is hindering businesses' ability to attract and retain workers, with 40% of Montana businesses indicating this issue.⁴
- **Affordable price points with opportunities to subsidize for families in need** – Prior to the pandemic, 13% of Montana families could not afford childcare nationally. That percentage drastically increased to 34% in 2020 due to COVID related employment changes and other factors.⁵ The majority of survey respondents indicated that they would be willing to pay between \$150 and \$299 a week for childcare at a new facility. A price point between \$200 and \$250 per week was most commonly indicated. There is also strong demand from families with household incomes less than \$50,000 who are utilizing family, friends, etc. for childcare to alleviate costs. Offering affordable and/or subsidized childcare would help to provide these families with quality childcare at a new facility. Scholarship opportunities can be better

³ Lost Possibilities, "The Impacts of Inadequate Child Care on Montana's Families, Employers, and Economy." September 2020.

⁴ Montana Department of Labor and Industry, "Impacts of Child Care on the Montana Workforce." November 2020.

⁵ ENHANCE, "Essential Child Care Needs COVID-19 and Beyond." November 2020.

utilized and expanded in Great Falls, including the Best Beginnings Scholarship where only 25% of eligible families are utilizing the opportunity to support childcare costs.⁶

- **Locations with the greatest childcare need** – Location of a new facility is crucial with survey respondents and interviewees noting that new facilities should focus within residential neighbors and central job locations. There is high demand for additional childcare capacity in the East End of Great Falls, especially near the hospital. Health care employers in the East End are finding that their workforce is challenged by a lack of childcare options. Other locations with high need are underserved areas of high poverty where neighborhood-scale childcare operations would help nearby families secure childcare.
- **Longer hours and flexible schedules** – While most families in Great Falls require traditional Monday through Friday childcare arrangements, there is some demand for longer hours including early drop off time and late pick-up time, and weekend availability. Survey respondents indicated there is a need for emergency backup care and flexible care to accommodate work schedules and family needs. Interviewees noted childcare challenges especially impacted essential workers during COVID where nurses and other shift workers worked extra hours at times when childcare facilities typically do not cover. There is also a need for drop in care, however with facilities being at full capacity there is few additional resources to support drop in children.
- **Quality staff and safety** – Safety and quality of care are top concerns among families when looking for childcare arrangements. It was indicated that families are looking for staff training and education, staffing ratios, consistency in teachers, educational programming, nutritional awareness, cleanliness, and high-quality engagement when looking at childcare options. A new facility will need to be mindful of the quality of staff and safety when marketing its services. Interviewees noted there is limited capacity for disabled, special needs, and high medical care children, and adding capacity in these areas would help to build a well-rounded program. Other interviewees indicated that advanced safety and education accreditation such as the National Association for the Education of Young Children (NAEYC) accreditation would help to provide a quality facility.
- **Business knowledge** – There are resources available to educate childcare entrepreneurs in Great Falls on starting and operating a childcare business. Family Connection offers funding, resources, and apprenticeship programs that can be marketed and utilized by these individuals.
- **Processes to increase efficiency** – Opportunities to increase process efficiencies and reduce costs for a facility will help to improve business success. Facilities entering into shared ownership or shared services agreements were mentioned in several stakeholder interviews and in previous childcare studies for Montana including shared services to assist with HR, accounting, business management, professional development, staff pools, etc.

⁶ University of Montana, Family Forward, Zero to Five, "Montana's Child Care Crisis: An Overview of Barriers and Solutions for Providing Affordable, High-Quality Child Care."

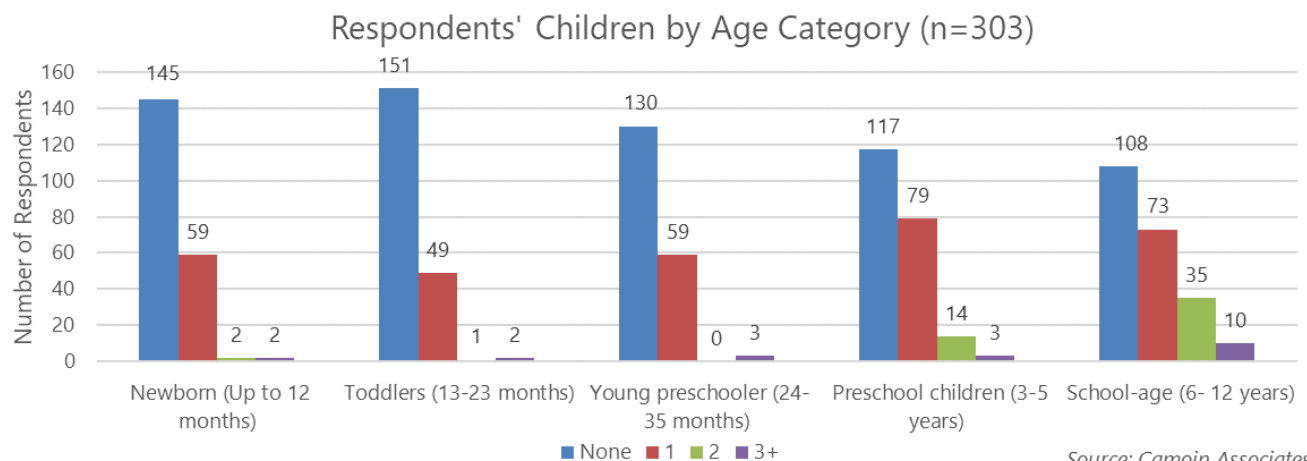
ATTACHMENT A: CHILDCARE DEMAND SURVEY RESULTS

RESPONSES

- A total of approximately 308 responses were collected and analyzed as part of the Great Falls Childcare Demand Survey from July 16th, 2021 to August 20th, 2021. All of those respondents completed the survey in its entirety with some respondents skipping select questions.
- Of the respondents, 21% (63) had one or more newborns (up to 12 months old), 17% (52) had one or more toddlers (13-23 months), 21% (62) has young preschooler(s) (24-35 months), 32% (96) had preschool children (3-5 years old), and 39% (118) had school-aged children (6-12 years old).
- Approximately 56% (141) of the respondents have a child currently enrolled in a childcare facility in Great Falls, MT.
- The majority of respondents do not have plans to have, adopt, or foster a child within the next five years (70%, 212 respondents) while some stated they do have plans to expand their families (15%, 45 respondents).

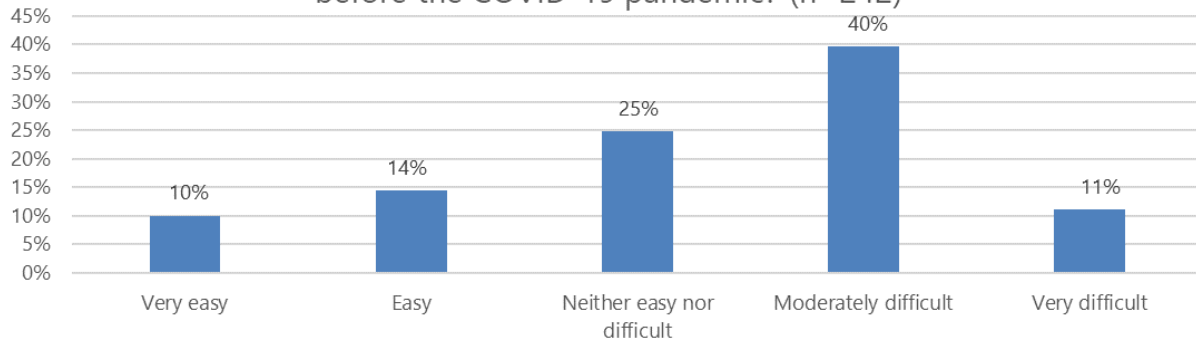
CURRENT CHILDCARE ARRANGEMENTS

A total of 303 respondents, indicated their children by age category. Approximately 39% indicated that they have a school-age child aged 6 to 12 years old in their household. Preschool aged children (3 to 5 years old) are present across 32% of respondent households, young preschoolers (24 to 35 months) are within 21% of respondent households, toddlers (13 to 23 months) are within 17% of respondent households, and newborns (up to 12 months old) are within 21% of respondent households. Few respondents indicated that there are multiple newborns, toddlers, or young preschoolers in their households.



Approximately half of the respondents (51%) indicated that it was moderately difficult or very difficult to find childcare arrangements before the COVID-19 pandemic whereas 10% said it was very easy.

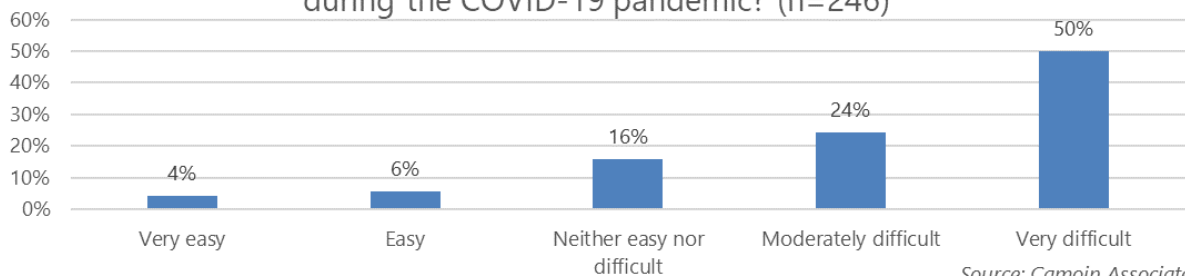
How easy or difficult has it been to find childcare arrangements before the COVID-19 pandemic? (n=242)



Source: Camoin Associates

During the COVID-19 pandemic, the difficulty of finding childcare arrangements increased with 50% saying it was very difficult, 24% saying it was moderately difficult and only 4% expressing that it was very easy.

How easy or difficult has it been to find childcare arrangements during the COVID-19 pandemic? (n=246)

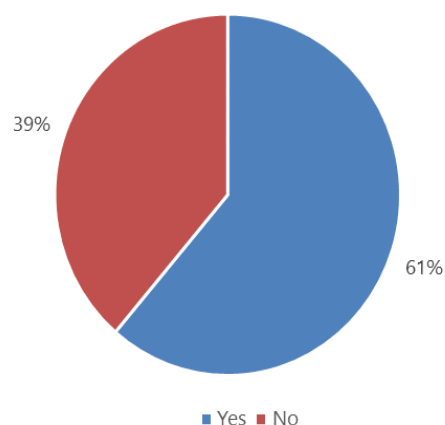


Source: Camoin Associates

Approximately 61% changed their childcare arrangements as a result of the COVID-19 pandemic. In some cases, there was no longer a need for after-school care because of remote work opportunities or lack of availability while others noted after-school care availability was highly limited. Other respondents indicated that capacity at facilities was limited resulting in reduced hours or shutting down. Others noted that they were not comfortable enrolling their children in a facility and sought alternative care such as family, friends, college students, and others. Healthcare employees noted that childcare was not available to meet the needs of increased hours and scheduling.

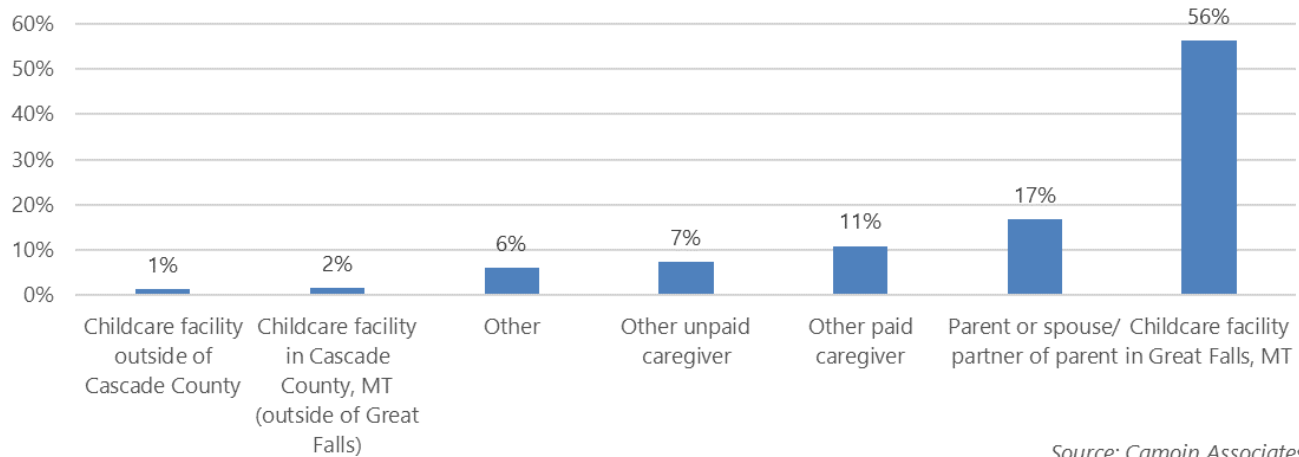
Approximately 56% of the respondents have a child currently enrolled in a childcare facility in Great Falls. The second most common childcare arrangement was parent or spouse/partner of the parent at 17%.

Have your childcare arrangements changed as a result of the COVID-19 pandemic? (n=222)



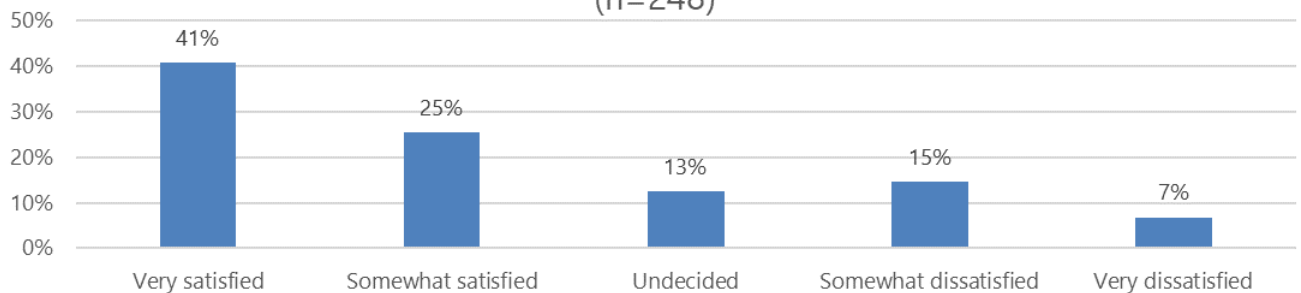
Source: Camoin Associates

What are your current childcare arrangements? (n=250)



When asked how satisfied respondents are with their current childcare arrangements, 41% are very satisfied, 25% are somewhat satisfied, 14% are undecided, 15% are somewhat dissatisfied, and 7% are very dissatisfied. Of the 17 dissatisfied respondents, 12 are utilizing family, or unpaid caregivers as childcare while 4 are utilizing a childcare facility in Great Falls.

How satisfied are you with your current childcare arrangements? (n=248)

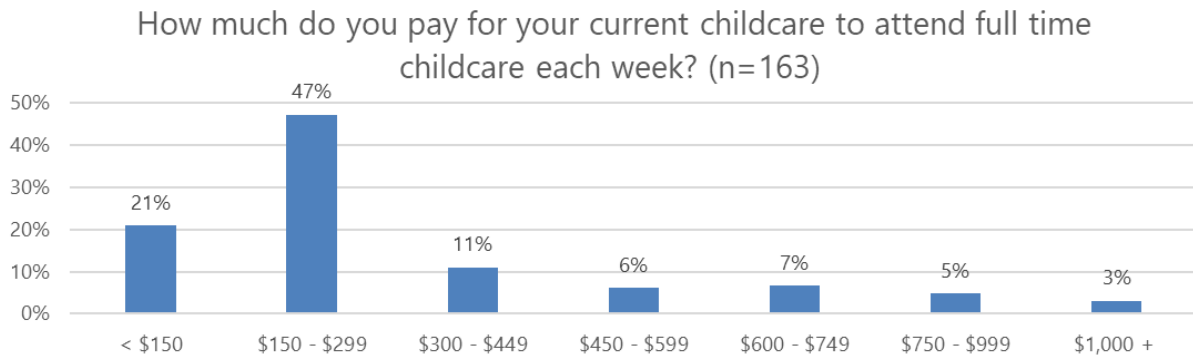


Survey respondents were asked, "do you anticipate your childcare arrangements will change in the next few months?" 60% of respondents do not anticipate their childcare arrangements will change while 40% anticipate they will change.

Do you anticipate your childcare arrangements will change in the next few months? (n=248)



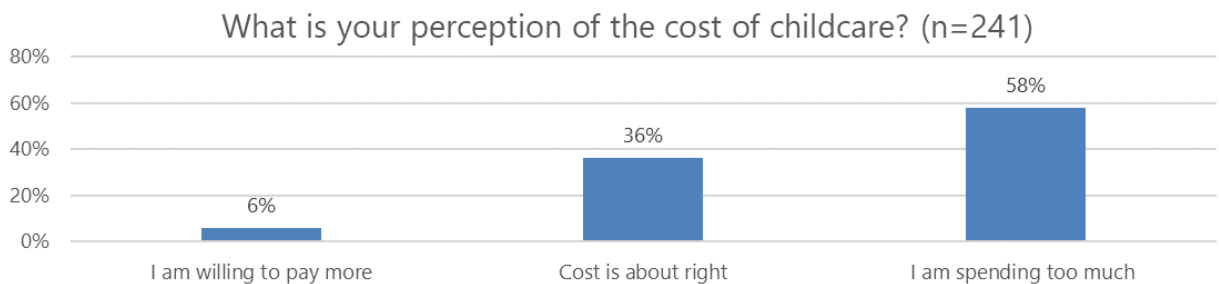
Not all survey respondents provided information on current rates for full time childcare. Of the 163 respondents who provided rate information, 47% are paying between \$150-\$299 a week.



Source: Camoin Associates

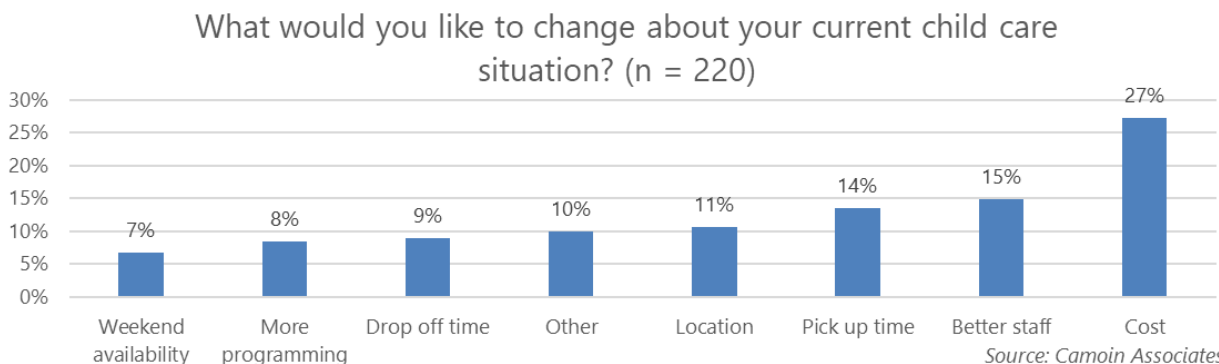
Survey respondents were asked, "How much do you pay for your current childcare to attend part time childcare each week?" Responses ranged from \$4 to \$33 an hour, \$25 per child per day, and \$90 to \$350 per week. Some respondents indicated that there is a flat weekly fee whether or not their child attends while others have to maintain full time status to secure their spot despite not needing the full time hours.

The majority of respondents (58%) believe they are spending too much for childcare while 6% are willing to pay more.



Source: Camoin Associates

The top things respondents would like changed about their current childcare situation are cost (27%), better staff (15%), and pick up time (14%).



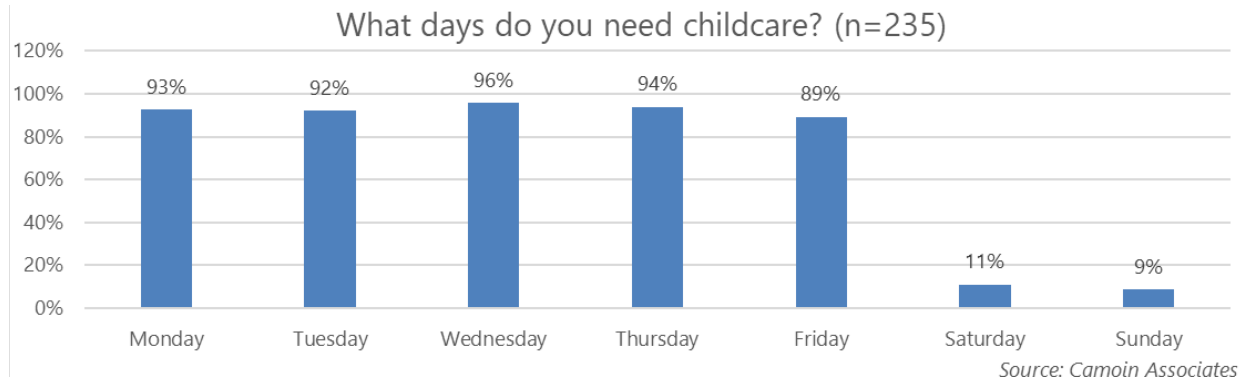
Source: Camoin Associates

As an optional survey question, respondents could indicate their current childcare facility. Top responses included:

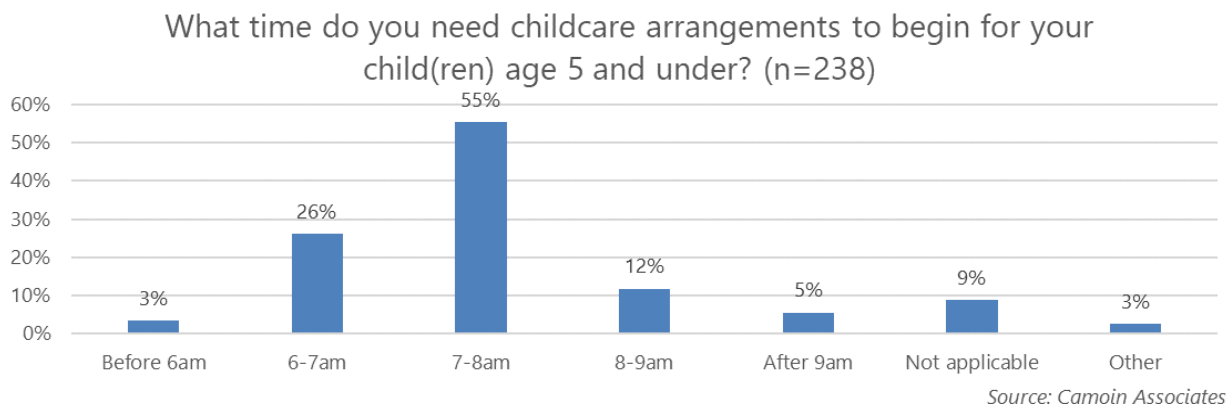
- Play N Learn
- Robin's Nest
- HANDS
- TLC Center
- St Thomas
- Wee Disciples

CHILDCARE NEEDS BY DAY AND TIME

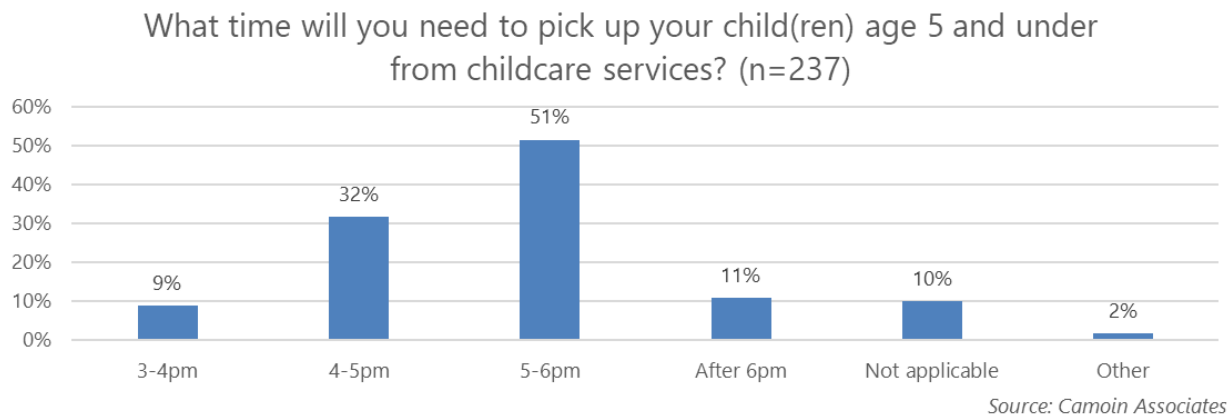
Childcare demand is predominantly focused on Monday through Friday with 11% of respondents indicating the need on Saturdays and 9% indicating need on Sundays.



For families of children 5 years old and younger, the majority of respondents (55%) need a drop off time between 7 and 8 AM. There is a small need for drop off before 6 AM (3%) and after 9 AM (5%).

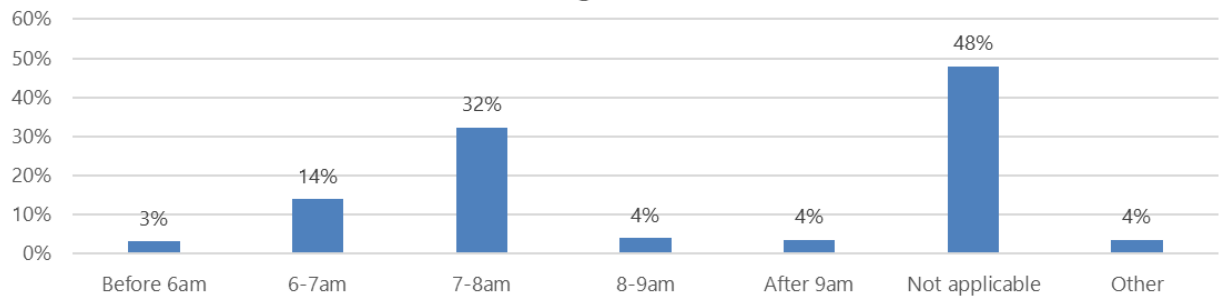


The majority of respondents need a pick up time between 4 and 6 PM for their children aged 5 years old and under. Approximately 11% need a pick up time after 6 PM.



Nearly half (48%) of respondents indicate that childcare start time is not applicable for their children aged 6 to 12. Nearly a third (32%) need a start time of 7 to 8 AM for the 6- to 12-year-olds.

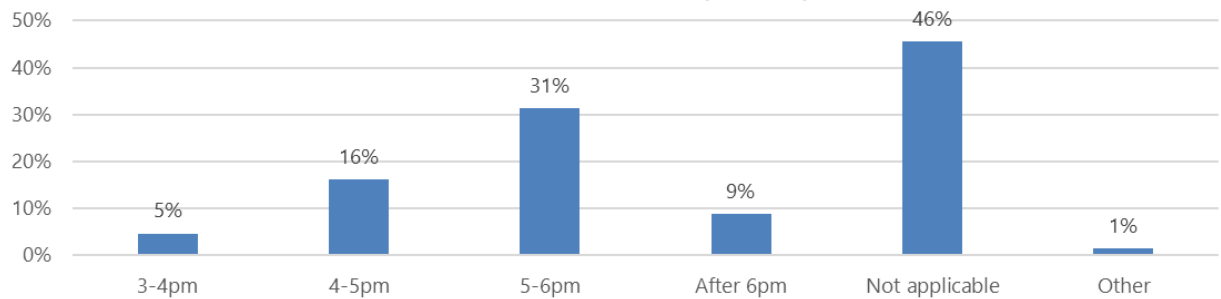
What time do you need childcare arrangements to begin for your child(ren) age 6-12? (n=223)



Source: Camoin Associates

Similarly, 46% of respondents indicated that a pick up time for their children aged 6 to 12 is not applicable. Approximately 31% indicated that a pick up time between 5 and 6 PM is needed.

What time will you need to pick up your child(ren) 6-12 from childcare services? (n=217)

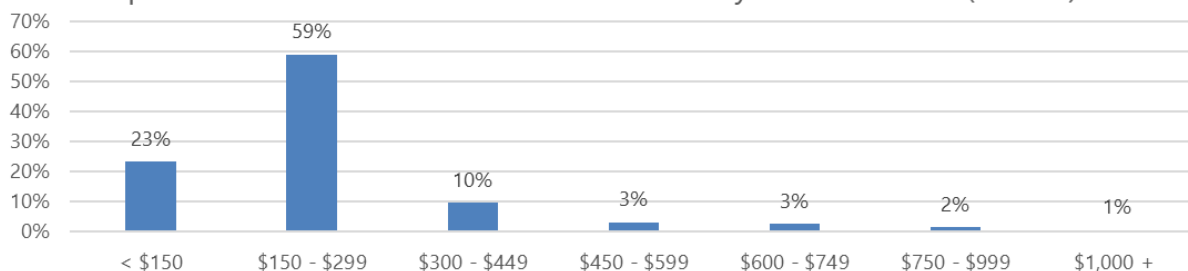


Source: Camoin Associates

PROPOSED FACILITY

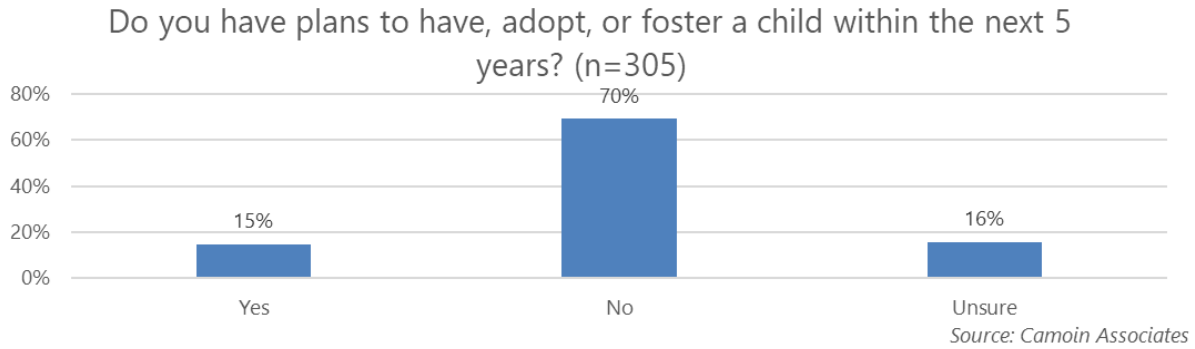
Survey respondents were asked what the maximum rate per week they would be willing to pay for full time childcare for one child in a facility in Great Falls. Approximately 59% indicated they would be willing to pay between \$150 and \$299 with 34% of respondents indicating they were willing to pay between \$200 and \$250 a week.

What is the maximum rate per week you would be willing to pay per child for full time enrollment in a facility in Great Falls? (n=188)

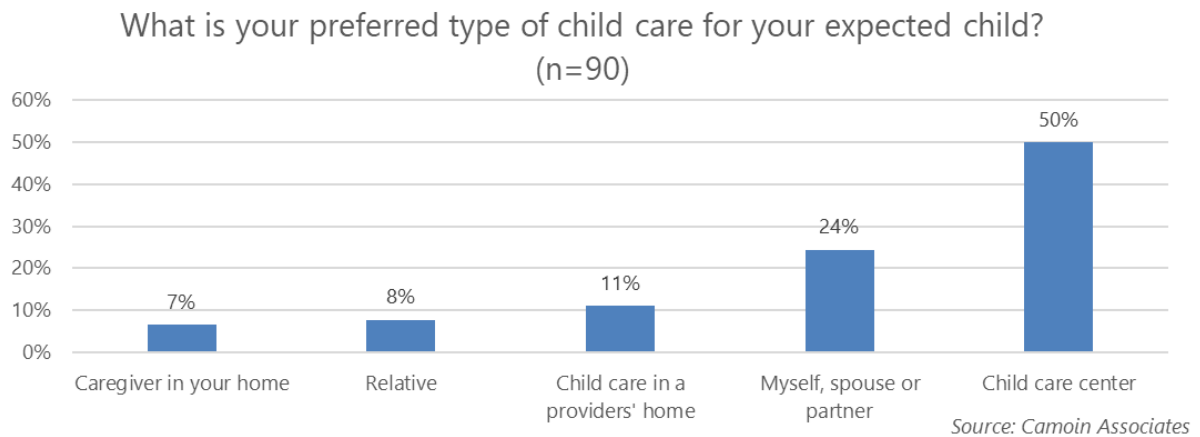


Source: Camoin Associates

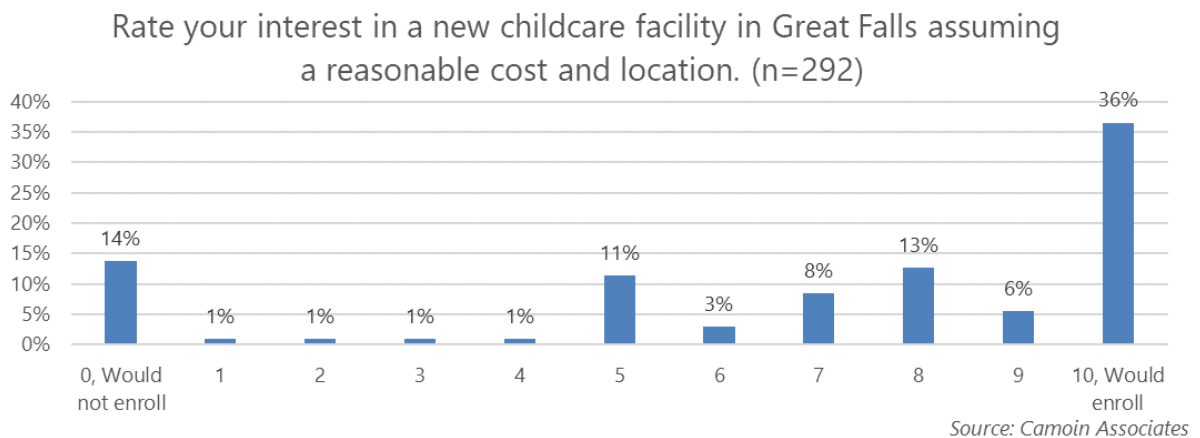
The majority of respondents (70%) do not have plans to expand their family in the next year while 15% have plans to expand their family.



The preferred type of childcare for survey respondents' future children are childcare centers (50%), parent/partner (34%), and childcare in a providers' home.

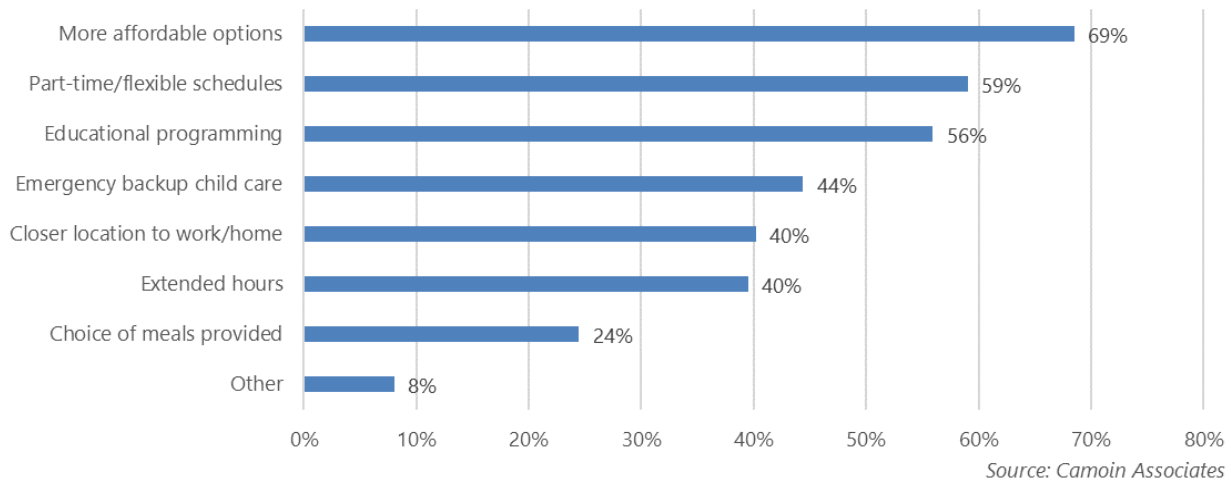


Survey respondents were asked to rate their interest in a new childcare facility in Great Falls with reasonable cost and location. 36% of respondents indicated they would enroll with an additional 27% having a high interest of enrolling (7 to 9). 14% indicated they would not enroll.



Affordable options, part-time/flexible schedules, educational programming, emergency backup childcare, a closer location to work/home, extended hours, and choice of meals would encourage enrollment at a new childcare facility in Great Falls.

Which of the following would encourage you to use childcare facility services in a new facility in Great Falls? (n=286)

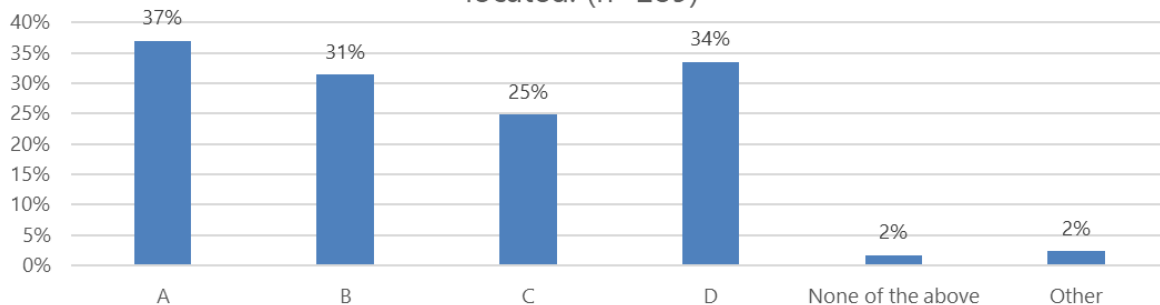


Survey respondents were asked to list any amenities, programs, hour, etc that a new childcare facility school include. Top responses include:

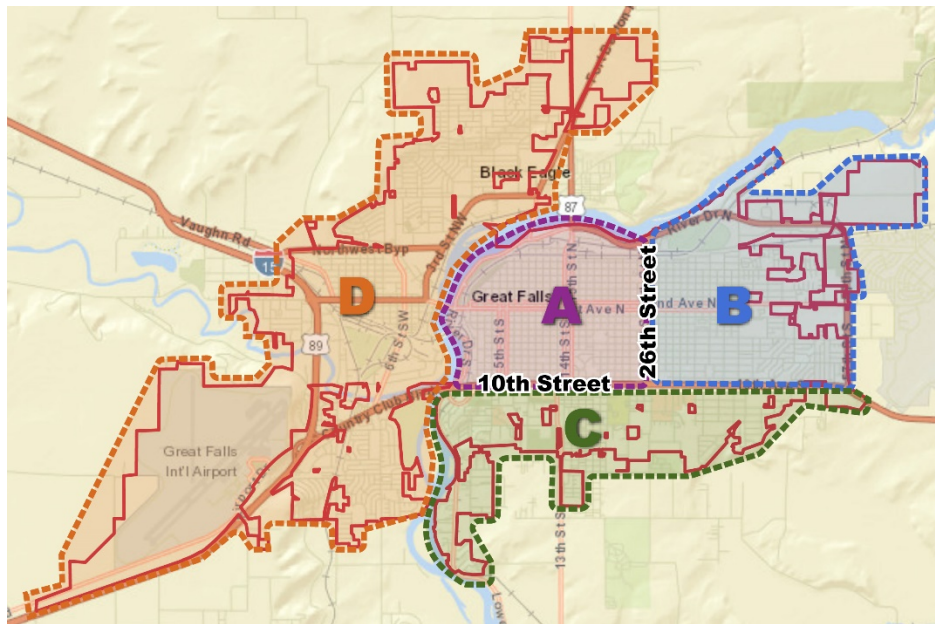
- Longer hours
- Flex hours and pay by the hour
- Educational programs
- Quality staffing ratios
- Exercise facilities and outdoor time
- Staff training
- Nutritional awareness

The City of Great Falls was divided into 4 sections, A, B, C, and D in the map below to examine the demand for a new childcare facility. The greatest demand for a new facility was in section A with 37%, followed by D with 34%, B with 31%, and C with 25%.

Please select where you would prefer a new childcare facility to be located. (n=289)



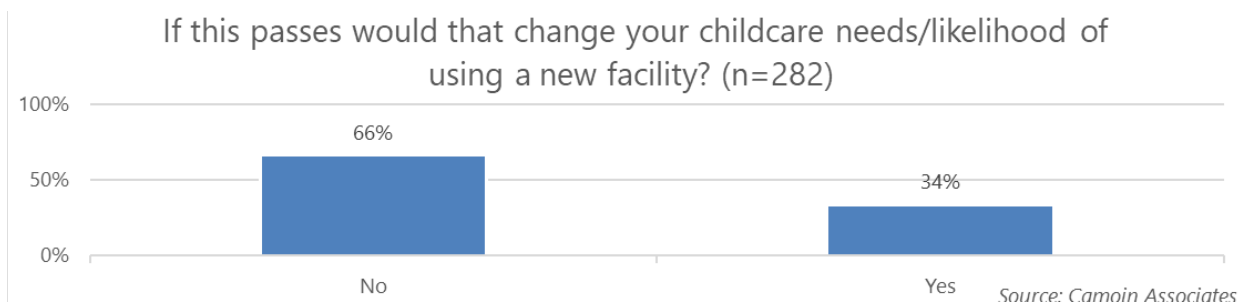
Proposed Great Falls Childcare Facility Locations



Survey respondents were asked, "In terms of childcare quality, what are important factors that a new facility should have?" Top responses include:

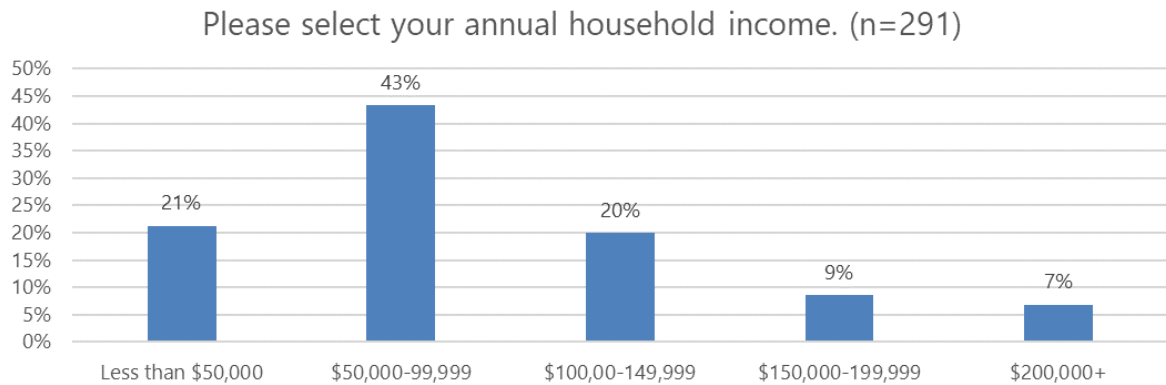
- Low staff to children ratios
- Employee background checks
- Open door registration
- Safety and security
- Staff training and education staff
- Cleanliness
- Flexible hours

In 2021, the child tax credit increased from \$2,000 per child to \$3,000 per child (\$3,600 for children under age 6). Families who qualify for the tax credit see monthly checks of \$167 to \$300 per child from July through December. The current administration is seeking to extend the expanded child tax credit through 2025. Survey respondents were asked "If this passes would that change your childcare needs/likelihood of using a new facility?" Approximately 66% of respondents indicated it would not change their childcare needs or likelihood of using a new facility while 34% indicated it would.



RESPONDENT DEMOGRAPHICS

- Approximately 93% of survey respondents live in Great Falls. Other places of residence included Malmstrom, Vaughn, Sun Prairie, Browning, Cascade, Fairfield, etc.
- Similarly, 93% of respondents work in Great Falls. Other places of work include Malmstrom, Vaughn, Black Eagle, Browning, remote, etc.
- In terms of household income, 43% of respondents have a household income of \$50,000 to \$99,999. Approximately 21% earn less than \$50,000 and 20% earn between \$100,000 and \$149,999.



Source: Camoin Associates

ATTACHMENT B: STAKEHOLDER INTERVIEWS

The Great Falls Childcare Feasibility Study was made possible through the generous contribution of professionals in the community that provided their time, energy, and feedback. As part of the process, Camoin conducted virtual interviews to understand the opportunities and challenges facing childcare in Great Falls. We thank the following individuals for their help and input during this process:

- **Elizabeth Olson**, TLC Center
- **Carol Paul**, Great Falls Public Schools
- **Casey Buckingham**, Benefits Health System
- **Debbi Blank**, TLC Center
- **Gaye McInerney**, City of Great Falls
- **Jason Nitschke**, Great Falls Development Authority
- **Julie Dougherty**, Bright Horizons
- **Lori Cereck**, Family Connections
- **Mary Kay Bonilla**, Great Falls College MSU
- **Raegen Breeden**, Play N Learn
- **Susie Zeak**, Toby's House Crisis Nursery

ATTACHMENT C: DATA SOURCES

PROPRIETARY DATA SOURCES

ECONOMIC MODELING SPECIALISTS INTERNATIONAL (EMSI)

To analyze the industrial makeup of a study area, industry data organized by the North American Industrial Classification System (NAICS) is assessed. Camoin Associates subscribes to Economic Modeling Specialists Intl. (Emsi), a proprietary data provider that aggregates economic data from approximately 90 sources. Emsi industry data, in our experience, is more complete than most or perhaps all local data sources (for more information on Emsi, please see www.economicmodeling.com). This is because local data sources typically miss significant employment counts by industry because data on sole proprietorships and contractual employment (i.e. 1099 contractor positions) is not included and because certain employment counts are suppressed from BLS/BEA figures for confidentiality reasons when too few establishments exist within a single NAICS code.

ESRI BUSINESS ANALYST ONLINE (BAO)

ESRI is the leading provider of location-driven market insights. It combines demographic, lifestyle, and spending data with map-based analytics to provide market intelligence for strategic decision-making. ESRI uses proprietary statistical models and data from the U.S. Census Bureau, the U.S. Postal Service, and various other sources to present current conditions and project future trends. Esri data are used by developers to maximize their portfolio, retailers to understand growth opportunities, and by economic developers to attract businesses that fit their community. For more information, visit www.esri.com.

PUBLIC DATA SOURCES

AMERICAN COMMUNITY SURVEY (ACS), U.S. CENSUS

The American Community Survey (ACS) is an ongoing statistical survey by the U.S. Census Bureau that gathers demographic and socioeconomic information on age, sex, race, family and relationships, income and benefits, health insurance, education, veteran status, disabilities, commute patterns, and other topics. The survey is mandatory to fill out, but the survey is only sent to a small sample of the population on a rotating basis. The survey is crucial to major planning decisions, like vital services and infrastructure investments, made by municipalities and cities. The questions on the ACS are different than those asked on the decennial census and provide ongoing demographic updates of the nation down to the block group level. For more information on the ACS, visit <http://www.census.gov/programs-surveys/acs/>

ONTHEMAP, U.S. CENSUS

OnTheMap is a tool developed through the U.S. Census Longitudinal Employer-Household Dynamics (LEHD) program that helps to visualize Local Employment Dynamics (LED) data about where workers are employed and where they live. There are also visual mapping capabilities for data on age, earnings, industry distributions, race, ethnicity, educational attainment, and sex. The OnTheMap tool can be found here, along with links to the documentation: <http://onthemap.ces.census.gov/>.



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