How Should We Conceptualize & Measure Child Care Demand? – August 5, 2020

1. Descriptive Information

How Should We Conceptualize & Measure Child Care Demand?	Facilitators
For measures of child care demand to be effective, what researchers are measuring needs to align with the needs of states using those estimates. The objective of this Think Tank is to engage in an interactive discussion of the ways that researchers, state administrators, and policy analysts are conceptualizing and measuring "demand" for child care within the context of equitable access to care, especially access for low-income families.	• **Tamara Halle,** Child Trends • **Sara Anderson,** Child Trends **Scribe** • **Ruth Bowell,** ICF
Two facilitators will guide participants in sharing their challenges and opportunities in measuring the demand for child care by ages of children, financial need of families, family characteristics (e.g., employment status) and program eligibility. Current strengths and shortcomings of various approaches will be considered. Through an active and facilitated discussion, we aim to move the field forward in how we measure demand and apply that measurement within a policy context. Proposed questions to encourage discussion include:	
• What are ways you have measured child care demand in the past? • What are the definitional and conceptual challenges in measuring child care demand? • What successes have you had in measuring demand? • What challenges have you had in measuring demand? • What is left out of common approaches? What aren't we capturing that we should? • What do we know from related literatures about measuring demand that could inform our work? • What are implications for policymakers and state-level professionals?	
Insights gained from the Think Tank will inform future efforts to reconceptualize and measure demand for child care.	

2. Documents Available on Website

• How Should We Conceptualize and Measure Child Care Demand?

3. Session Introduction and Poll

• Tamara Halle from Child Trends opened the session and shared PowerPoint slides which provided a brief history of CCEEPRC as well as the purpose and flow of the session.
• The session began with a short poll so the facilitators could understand who is participating in the group discussion. Participants were asked to select how they most identify their role or affiliation by selecting the best response.

Poll Results

1. Please indicate how you most identify your role and affiliation.

University-based researcher	(11) 13%
Researcher at a research firm	(9) 11%
Researcher or analyst with a state or the federal government	(23) 28%
State or local child care administrator	(20) 24%
Child care advocate	(19) 23%

Session Purpose
- Spark conversation and sharing of ideas around measuring demand for child care by considering past approaches and brainstorming innovations
- Key question: How should we conceptualize and measure child care demand?

Think Tank Process
- Share your experiences measuring child care demand
- Share measurement challenges and successes
- Identify ways to overcome challenges
- Identify innovation methods for estimating child care demand
- Introduction and sharing of discussion prompts for Think Tank
- Participants will be assigned to breakout rooms for a facilitated discussion
- Reconvene to share learnings, have further discussion, and discuss next steps

Think Tank Discussion
Common Approach for Defining and Estimating Demand
- Our *definition* of demand will drive how we *measure* demand
- Today we will focus on defining demand for care *without focusing heavily on the notion of supply of care*
- Children within an **age range** with families within an **income range** and **all parents in household working in labor force**

Discussion Prompts
- Promising **measurement techniques** and **data sources** for capturing child care demand
- **Innovative ways** to ask parents about child care needs and preferences
- High priority **policy questions** about cc demand
- What do we still need to know? What are the **gaps** and some concrete **next steps**?

4. Breakout Room Facilitated Discussions

Following the introduction, each attendee was assigned to a breakout room to facilitate small group discussions focused on the four discussion prompts. The facilitators used the IdeaBoardz platform to capture the discussion for each of their groups. NOTE: The IdeaBoardz was not saved for one group and is therefore unable to be represented here. (Please note IdeaBoardz for Breakout Group 3 did not save.)

Breakout Group 1:

IdeaBoardz

Export | Login

Q start typing to filter stickies

View Section: All Sections   Sort By: created time

CCEEPRA Think Tank: Conceptualizing and Measuring Child Care Demand

Measurement Techniques

- Used for essential workers as well. But benefits beyond COVID. +0
- Parents say where were looking for care (home/work). Text goes to provider, ask for availability, text to family with location and # real ti +0
- For essential workers. Essential workers could identify if were open and needed care. Gov't partnership. Higher income more likely to use +0

Data Sources

- Data trust: Combine data that partners decide to include. Licnsing, CCR&R, businesses. Pool data and make available for parents. +0
- Requires that provider has to be in a system. CCR&R often calls parents as well. Has daily information and update on providers. +0
- Collect data on demand from pediatricians. Families go on regular basis. Can info be gathered there? ALL families +0
- With Peds: Developmental monitoring - difficult to get into dr offices. +0
- Community action prgm: 17 item questionnaire for ppl who call in. Location, type of care, econ issues. Use data to recruit cc providers. +0
- Generate supply/demand gap analysis annually using questions. Lost providers from COVID and in high demand +0

Policy Questions

- Why do parents need or want care? 1-convenience; 2-quality +0
- How should unemployment be considered when we think about demand? What does that mean about need? +0

Gaps and/or Next Steps

- Make matches with ages of children and particular slots. Many different ways to set up the system. Often needs for several childre +0
- Hard to access all of the types of families and not just the same ones. Not representative data. +0

Breakout Group 2:

IdeaBoardz

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View Section | All Sections ▾ | Sort By | created time ▾

CCEEPRA Think Tank: Conceptualizing and Measuring Child Care Demand

Measurement Techniques ⊕

| More supply than demand: How many centers have vacancies by age groups. Hard to capture demand right now; it's all over the place. +0 | Looking for care depends on the age of the child, but number of children in the home also affects what type of care is sought +0 | What kind of child care options are in the community will influence demand. +0 | Study of New Hope welfare project in Milwaukee. Level of trust with the community was a key factor in demand for care. +0 |

| Level of trust measure. Eco-cultural approach. How families organize a daily routine. Trust kept coming up about how they cope with daily +0 |

Data Sources ⊕

| Child Care Aware system keeps track of vacancies --------------- +0 | State market rate surveys. Are any collecting demand data? Or could they collect it in the future? LA is doing this. +0 | CARES money is supporting collecting some of the real-time data. +0 | Care.Com or Angie's List may be a data source for understanding demand for care. Not a lot of demand is counted. Family child care providers can advertise for free on Care.Com. |

| Wonder School is a technology platform connects parents seeking care with people offering home-based care +0 |

Policy Questions ⊕

| If we knew more about demand, we could expand or open more centers. What are families wanting? FCC? Smaller center-based care? +0 | Regulations constrain supply. Pricing people out of the market with regulations. While its important to have background checks... 1 True supply/demand isn't there | Look at all populations of families who need child care (English learners, all economic categories, including middle income families). +0 | As incomes have shifted (due to the pandemic), there might be a larger group of eligible families for subsidy. +0 |

| +0 |

Gaps and/or Next Steps ⊕

| Don't know about site-specific waiting lists +0 | Gap - Knowing the true demand for care because of price of care. Don't know demand for care when copays (for subsidy) go too high +0 | Some sort of sliding scale for subsidy (at the state level) +0 | Challenge is that market rate surveys are a snapshot in time. Wish for more real-time data, especially right now +0 |

| The number of children in the family is important. Move to a nanny to pay one price for all 3 children +0 | Social capital - what knowledge about how to find child care in my community? Is Angie's List part of my search? +0 | Next Step: How to adapt the eco-cultural measure of how families cope with daily life might get at current context. Trust of provider. +0 | Innovation: Figure out a way to capture parents' online search for care. +0 |

| Innovation: Pair in-depth interviews from random and targeted families combined with large quantitative analysis. +0 |

Breakout Group 4:

IdeaBoardz

Q start typing to filter stickies

View Section | All Sections ▾ | Sort By | created time ▾

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Measurement Techniques ⊕

| Look to employers-- parents need child care for work. Employers may know what their employees are looking for in terms of CC. +0 | Can we use resource and referral agencies as a source of information for family CC need? CCR&Rs may be a good data source-- a lot are doing surveys. MN adminstering survey for | Focus groups and 1:1 interviews with families to ask about CC needs, preferences. Used to measure availability and access. +0 |

Data Sources ⊕

| Administrative data- HS, preschool. Enrollment, applications, wait list data. Child care subsidy waiting list, program capacity, enrollment. +0 | Survey to FCC requesting information. If they are seeking CC for school age children. +0 | Data coming from the supply side- from providers. Has anyone used household surveys or parent input to measure demand? +0 Have done some surveys with |

Policy Questions ⊕

| How do we ensure families are seeking high quality child care? +0 | Flexibilities for subsidy to support parents AZ- subsidy available for families who are on the front lines +0 | Are states working with CCR&Rs to map demand? +0 |

Gaps and/or Next Steps ⊕

| Hearing everyone's voice and story is challengin to capture. +0 | Not all families engaged in formal systems for capturing data. +0 | Not as much capacity in the I/T space. +0 | Measuring demand from families-- hard to capture information on full population +0 |

| How we define demand will determine the quality of the data we collect from providers Demand should be based on family need and what they would like for their child. What In the spring/early summer of 2019 there were 15 million children 6-12 with employed parents --lg need for subsidy +0 | Should we be defining demand differently-- based on the needs of parents? children? +0 | Families working from home due to COVID-19, changing CC needs. Families don't know if they are eligible for subsidy. Hard to measure demand +0 | Parents not used to budgeting for child care for school age children - looking to states to support Lost centers due to COVID-19-- trouble finding care close bu |

Breakout Group 5:

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Measurement Techniques ⊕

Demand in the context of what is locally available and understanding how demand may change if those variables change. + 0	Thinking about high-risk populations (homelessness, employment) + 0	Think about what is being demanded? For example, quality. Can inform how to educate parents to demand quality. + 0	Thinking about demand with an equity focus (e.g., non-traditional hours) + 0
COVID has taught us that there are lots of great tools for rolling up data, quickly + 0	Can use EHS/HS data to understand what parents actually need, by asking how well EHS/HS/arrangements are meeting their needs. + 0		

Data Sources ⊕

American Community Survey + 0	Birth data and statistics + 0	Social service data + 0	School age data in early elementary can be used to capture "hidden children," because ECE isn't required. + 0
State workforce registries (capturing data about licensed programs, centralized waiting lists) + 0	Surveys/focus groups with parents (provide broad trends and then gather in-depth information) + 0	NSECE + 0	

Policy Questions ⊕

Is there enough supply, relative to demand? Can parse out by specific groups and inform investments. + 0	How well does a program meet parents' needs? Are they providing the coverage parents need? + 0	Do parents know what options are available to them? What information is availble? + 0	How subsidies might change demand (type of care, number of arrangements)? Understanding what's accessible is especially relevant now, during COVID? How are policies adjusting to meet parents' needs?

Gaps and/or Next Steps ⊕

Unduplicated counts; How are systems working together to understand where children are being served and where they should be served? + 0	Need to tap into existing resources- For example: Work with Bright Futures (doctor guidance for well visits) can be used to identify child care needs. + 0 Doctors have a unique opportunity to communicate	Missing qualitative information about what parents want and need + 0	There are conceptual challenges with using data about what child care arrangements parents are using, because this is driven/limited by what is locally available. + 0
Data (and the way they are collected) differ from one place to another. Difficult to line up and compare across geographic locations. + 0	Lack of detailed family economic data to help parse out demand by demographics; it is also challenging to determine how to parse these data out + 0	Large scale data collection efforts, funded by ACF, provide an incredible wealth of data. This type of resource is extremely important! Ideally, we would be able to link these national data collection efforts to local data	Consider what other data sources can serve as voice for parents (e.g., early services, community groups) + 0

Breakout Group 6:

CCEEPRA Think Tank: Conceptualizing and Measuring Child Care Demand

Measurement Techniques ⊕

NC: Assistance to respond to CCDF plan to increase child care supply. Used ACS data, average estimates from 2010-14 to get #of kids, county + 0	

Data Sources ⊕

WA: Uses information from CC aware on parent prefs (age, income, schedules) + 0	WA: Has a COVID tracking for openings or closings and reasons for closing + 0	NSECE as a source for preferences and needs (2012 can be analyzed, 2019 is being collected); household level of needs + 0

Policy Questions ⊕

WA: Identified cc deserts where there's a need for family cc, some reopening and some cautious with COVID   + 0

Gaps and/or Next Steps ⊕

ND: Use ACS and workforce data, but is there a better way? + 0	How do we know who would get a job if they could get child care? Issue because we limit demand to those with working parent(s) + 0	Assumptions that are easy in K-12 are not there in ECE. Why isn't every child born in MA, considered demand? There are market considerations + 0	WA: Many parents patch a cc system (not just 1 prov), needs fluctuate; aware of 20% of where kids are, license is only for 4+ hours + 0
ND: Preschool may or may not meet demand for some families, struggle about when to include or exclude these data + 0	Children not receiving subsidies are a mystery at the state level + 0		

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5. Brief Summary of Presentations

As each group presented a summary of discussions held during the breakouts, the highlights were added to a single board by category: Measurement Techniques, Data Sources, Policy Questions, and Gaps and/or Next Steps. Some groups added highlights for some but not all categories. NOTE: The numbers in the next section correspond to the order of each presenting group and do not necessarily correlate to the Breakout Room numbers in previous section.

Summary of Presentation #1:

Policy Questions
- How do we think about the needs of families who are unemployed (either one or both)?

Data Sources
- Use a data trust: Combine data that partners can decide to include. Licensing, CCR&R, businesses. Pool data and make available for parents.
- Example from a Community Action Program in New York: 17 item questionnaire for people who call in. They can provide the location, type of care, and other economic issues. Use data to recruit more child care providers.
- Collect data on demand from pediatricians. Families go on a regular basis. Can all information be gathered there from all types of families?

Gaps and Next Steps:
- It is difficult to access all types of families and not just the same ones. Not representative data.

Summary of Presentation #2:

Measurement Techniques
- Measuring demand is difficult. Dynamic and changing. Market rate survey is only so useful as it's point in time
- Need to know about ages and number of children. Type of care depends on # of children.
- Need variety of measurement techniques for all of the ways to look at demand for care.

Policy Questions
- Look at all populations of families; including non-English; all economic categories; larger group of families eligible for subsidies
- Changes and expansion of demand; Working from home; care for school aged children; budgeting for school aged youth

Gaps and/or Next Steps
- Ecocultural measure (New Hope): how cope with daily life; sense of trust in a provider matters for who families seek out.
- Capture online search for care beyond licensing or CCR&R; care.com, Wonderschool, Angie's list for understanding demand

Summary of Presentation #3:
Measurement Techniques
- Survey designs to understand needs and also comfort with type of care; focus groups or one on one.

Data Sources
- CCR&Rs are potential sources.

Policy Questions
- Expansion of eligibility to different income levels.
- Follow up questions with state administrators

Gaps and/or Next Steps
- We don't know who is not engaged but who may be able to benefit from care

Summary of Presentation #4:
Measurement Techniques
- Real demand is hard to capture

Data Sources
- Capitalize on existing data as being a time saver and being more efficient
- Local census data from school districts in addition to state demographic data.

Gaps and/or Next Steps
- Child care search tools; pop up survey to capture information about preferences and needs.
- Parent advisory boards could help to engage families
- Employers -- non-traditional hours

Summary of Presentation #5:
Data Sources
- Challenge about data consistency of programs and localities
- National survey is good and necessary but also need data at the local level
- Pediatricians may be an untapped data source

Gaps and/or Next Steps
- What do parents actually want and need? Ask HS and EHS about whether it meets children's needs. If families need a patchwork of arrangements, they may not be meeting need
- Some families may be missing from these data collections efforts

Summary of Presentation #6:
Data Sources
- NSECE survey
- Child Care Aware data; what parents search for when they're looking for care

Gaps and/or Next Steps
- Data still isn't always sufficient to make all of the decisions made for all families especially under-represented families

As the group presentations were made, participants added their thoughts to the Main Room Chat and these included the following:

- From Ivelisse Martinez-Beck: What are the challenges to measuring unemployment accurately and how to address the changing circumstances of households in terms of who is or will be employed over time?
- From Nick Mader - Chapin Hall – Facilitator: Pediatricians as untapped data source and mechanism for sharing information (especially as a trusted source around health)
- From Holli Tonyan, University Researcher: Pediatricians are such a great idea! Churches might be a good source, too. Many families use word-of-mouth in the community to learn about what is available to search for and demand.
  What "local" means can vary so much, too. Just over the hill where I live, there is a HUGE difference in what child care is available in what price range which impacts who looks for child care and where.
- From Bronwyn Fees, University Admin, K-State Un.: We have found that not all have access to reliable internet, particularly in rural areas. Surveys need to be completed by phone as well as paper-based surveys are still viable options. thank you!

6. Brief Summary of Discussion
Themes that were noted today
- Pediatrician as source of data
- National data vs. local data tension
- Importance of making sure we capture information on all types of families – are we really getting those families who need the type of care and how do we access those types of families?

Innovative ways that people are currently doing and working towards for measuring child care demand came up today. Based on number of people that were interested in this session and the diversity of backgrounds, this is a really pressing issue.