Building Blocks Report:

The Early Care and Education Landscape in the St. Louis Region

INTRODUCTION TO THE DETAILED DATA TABLES AND MAPS, PLUS FINDINGS & RECOMMENDATIONS

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Produced by the St. Louis Regional Early Childhood Council Data Committee in conjunction with Missouri Wonk and Vision for Children at Risk

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Overview

Despite what we know about the importance of high-quality early childhood opportunities, far too many children in the United States lack access to quality care, especially poor children and other vulnerable children who stand to benefit the most. Access to high-quality early childhood opportunities is all too often determined by parental income and geography; and federal programs designed to support high-quality early learning and development are too underfunded to serve all eligible children.

– Children's Defense Fund

An abundance of research in recent decades by the Brookings Institution, Harvard University and the National Education Association, among others, documents that high quality early child care and education contribute strongly to promoting the well-being of young children and putting them on a positive life trajectory. **The indisputable finding is that high quality early child development is critical for young children.**

A related and equally robust body of evidence demonstrates that high quality early care and education returns a very high return on investment, reducing the costs of social programs and spurring employment, higher wages and home ownership. That high return on investment has been documented by Nobel Laureate economist James Heckman and the Federal Reserve Bank of Minneapolis, as well as many others. **The inescapable conclusion from this research is that quality child care is good for the broader society and local communities.**

That's the good news. The bad news is that in many communities – including a host of local communities across the St. Louis region – many children, indeed sometimes most children, lack access to the high quality early care and education programs essential to promoting their well-being and successful development.

REASONS FOR LACK OF ACCESS TO QUALITY CARE INCLUDE:

- Existence of too few quality programs
- High cost of quality care
- Lack of geographic and economic access to existing quality programs
- Insufficient funding to invest in creation of quality programs
- Missouri's lack of a quality rating system that fails to assist parents and families in making informed choices in selecting high quality child care
- In Missouri, a weak Child Care Subsidy Program that does not sufficiently assist parents in securing quality care

All of these issues raise the obvious question of how we can get to the point of providing every child with access to the quality early childhood programs critical to their well-being and that of the communities in which we live.

What is certain is that creation and maintenance of high quality early care and education programs does not occur spontaneously. It requires intention, hard work, significant investment and putting sound programs and policies in place. Neither will a system providing quality care to those in need be constructed anew from the ground up. **The strategy must, instead, be to build a system of quality child care through expansion and improvement of the wide array of early care and education offerings that currently exist in the community.**

The starting point for building an effective and equitable system that provides quality early care for all is understanding the early care and education programs that are now in place. The next step is to employ the measures necessary to maintain, strengthen and improve existing programs, while filling in gaps related to quality and access.

1

Purpose of the Report

The purpose of this report is to provide the best available information on the current child care offerings in the St. Louis community.

The report is directed to: (1) facilitating analysis of supply and demand related to early care and education programs; (2) providing the rudimentary information that is available related to the quality of care; (3) allowing areas of high child care need to be identified; and (4) supplying baseline data so developments and trends can be tracked over time. This introduction to the report and the detailed data offered in the Appendix that is available online are intended to equip child care providers, policy-makers, parents and families, and the broader community to better do the hard work of ensuring high quality child care is available to all children who require it.

DATA IS PROVIDED ON:

- Types of early care and education programs
- Regulatory status of programs
- Capacity of the facilities
- Demographic characteristics of the populations being served

Grasping the types of detailed information outlined above is essential to taking the action required to build a system that provides quality early care and education to all children in the community. Fully understanding the detailed information related to all elements of the existing child care system is, however, an admittedly complex and arduous task. Section 3 of this report explains the meaning and explicates the significance of these key types of information.

2

The Big Issues Related to Providing Quality Early Care Programs

A. Understanding and Fostering Quality Early Care

While there are many aspects and various technical definitions of what constitutes high quality early care and education employed by governmental and accrediting agencies, there is general consensus on the major characteristics of quality programs. The California Department of Education offers a broad definition of quality adapted from a report from the National Association for the Education of Young Children.

The report states that "quality is defined as a degree of excellence. This means not average, not 'it will do' child care, but excellent child care. Bottom line, you need to feel that the child care provider selected will offer a safe and stimulating, loving environment in which children will mentally and physically thrive."

CHARACTERISTICS OF QUALITY INCLUDE THE FOLLOWING:

- Settings that are safe and provide small group sizes and adult-to-child ratios encouraging the best opportunities for development;
- Caregivers or teachers who have experience and are trained in early childhood development;
- Settings that offer opportunities for meaningful parent involvement;
- Learning materials and teaching styles that are age-appropriate and respectful of children's cultural and ethnic heritage; and
- Learning opportunities that promote your child's success in school.

While almost all states offer quality standards for early care and education, as well as initiatives to promote program quality, Missouri does not. That puts parents and families at a disadvantage in trying to identify and select quality child care. Moreover, Missouri's limited funding to improve program quality negatively impacts the supply of high quality programs. In attempting to provide an overview of early care and education programs in the St. Louis region with a focus on quality offerings, this report is forced to use imprecise, proxy measures in trying to assess the quality of child care programs. That circumstance needs to be improved.

Beyond the issue of the existence of and ability to identify quality early care programs, the third critical aspect of the quality dilemma is getting children access to quality programs.

THERE ARE MANY BARRIERS TO ENROLLING CHILDREN IN QUALITY CHILD CARE PROGRAMS, INCLUDING:

- Long waiting lists for quality programs in particular localities, for specific age groups and families requiring extended hours of operation
- Geographic access related to program location and lack of transportation
- Financial issues related to the higher cost of care, lack of subsidies and/or unwillingness of programs to accept subsidies
- Cultural competence and the ability of programs to effectively address the needs of all groups of children and meet parent's needs.

B. The Significance of High Need

Areas within the St. Louis region have disparate demographic characteristics, including income levels, socioeconomic status, and educational and health outcomes. As a result, areas have different needs.

In efforts to ensure provision of high quality early care to all children, need emerges as a major issue. All children require quality care, but there is a particularly vital need in this arena – and particular benefits that accrue – in providing quality care to children in life circumstances in which their early developmental life needs are less likely to be met. With a goal of improving current early care and educational offerings and building a system that provides quality care to all children, there is a particular imperative and focus in this report on identifying geographic areas of high need so strategies can be developed to better provide for those needs.

To that end, an Early Childhood Needs Score has been developed for each ZIP code and the score is included here in the individual ZIP code data tables and maps presented in the report's Appendix. The individual ZIP code reports are ranked-ordered from areas of highest child care need to lowest. The Needs Score is based on four factors: (1) poverty, (2) low birth-weight, (3) single parent households, and (4) unemployment. Following is a summary explanation of why these particular measures are of significance in developing a needs index related to early care and education.

Poverty

Economic deprivation drives a wide range of problems and negative life outcomes. Children and families in poverty are more likely to face issues related to hunger, health and housing and suffer the related negative effects. Additionally, the range and quality of educational programs for those living in poverty is often reduced. While the life needs for those living in poverty are almost certain to be high, the availability of resources and supports to address those needs is likely to be low.

Low Birth Weight

A child born at low birth weight is much more likely to face significant problems related to health and development. That situation is apt to produce life-long challenges and needs. Many of those challenges and needs can be addressed through quality early care and education programs.

Single-Parent Households

Families with two parents allow for sharing duties related to child rearing and development. Structurally a single-parent household has a greater need for quality early care and education programs that can provide assistance with the tasks of early care and education. Two-parent households also are likely to have higher incomes.

Unemployment

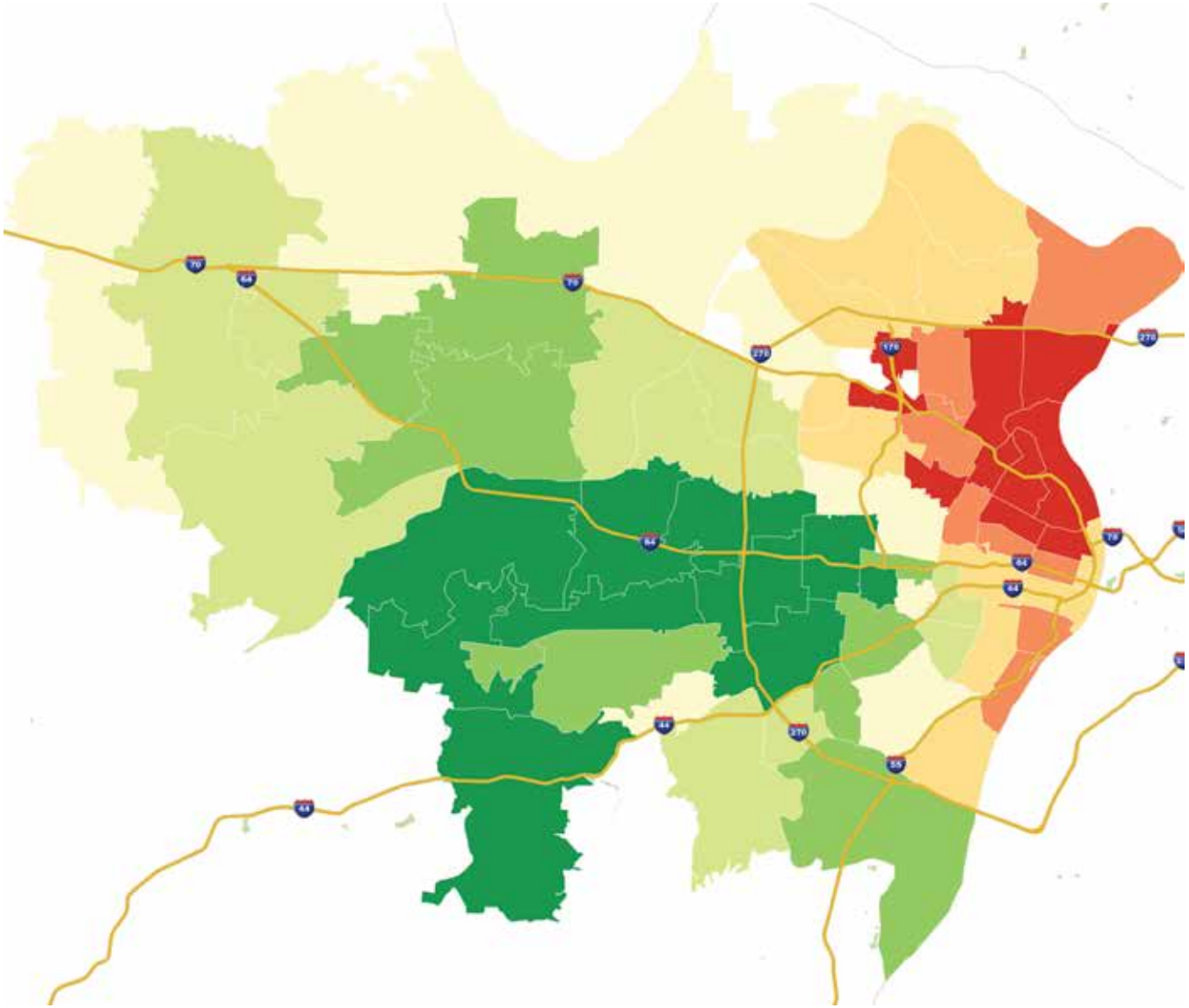
Increasingly the economic imperative is for all individuals to move into the labor force. The process of searching and applying for jobs is arduous and time-consuming. As the adage goes, looking for a job is a full-time job. Where unemployment is high, there is an increased need for early care so that heads-of-households can look for, apply for, and train for work.

The individual maps and tables presented in the Appendix to this report include a Needs Score for each ZIP code, but not for school districts. As noted above, those individual tables and maps are ordered from areas of highest to lowest need.

The composite ZIP code map on the following pages, provides an overall picture of need for early care and education programs across the three-county region – the City of St. Louis, St. Louis County and St. Charles County. On the map the ZIP codes in red and orange indicate the areas with greater needs while the ZIP codes in shades of green indicate the areas of lesser need.

The *Children of Metropolitan St. Louis* report produced by Vision for Children at Risk (www.visionforchildren.org) provides a detailed explanation of each of these four measurements and related indicators of child well-being. The data is available at the ZIP code level for the five counties at the core of the St. Louis region.

Early Childhood Need Score by ZIP Code in the St. Louis Region



Early Childhood Need Score

Highest Need	1.85 - 2.52
	1.27 - 1.84
	1.02 - 1.26
Near Average Need	0.78 - 1.01
	0.68 - 0.77
	0.56 - 0.67
Least Need	0.31 - 0.55

NOTE

The map identifies areas by level of need, however, the score does not reflect the number of children impacted by the need. Attention should also be paid to the number of children living in each ZIP code when utilizing this information. A larger number of children living in high need constitutes still higher need.

C. Role of Child Care Subsidy Related to Availability of Quality Care

It is an economic reality that high quality early care and education programs cost more than programs of lesser quality. To achieve and maintain high-quality, safe programs investments must be made in physical facilities, well-trained care providers, curriculum development, food and nutrition, etc. This presents a dilemma for high-need children and families with limited economic means. How can families get access to the costlier high quality early care and education programs from which their children would benefit?

In some instances high quality programs are available at low or no cost. The federally supported Head Start program and some local programs – such as early care programs operated by school districts – can help parents and families bridge the economic gap to get access to quality programs. There are, however, too few such programs and too many families, therefore, for whom quality care remains out of reach.

States attempt to address this conundrum through child care assistance and subsidy programs that provide payments to low-income families to offset the cost of child care. In this vein, Missouri operates the Child Care Subsidy Program funded through the federal Child Care Development Block Grant (CCDBG) that assists eligible Missouri parents and guardians with payments for child care. The program helps families with the cost of child care so that they are able to focus on finding and holding steady work that can support their family's needs.

I**n Missouri, however, compared to other states, subsidy payments are low and eligibility requirements to qualify for the program are very stringent. While Missouri's rank among the states fluctuates slightly from year-to-year, Missouri is perennially at or near the bottom of the rankings related to subsidy levels and eligibility requirements.** Additionally, it is estimated that only about 15% of eligible families in Missouri are being served by the subsidy programs, a figure that is in line with national averages.

The St Louis region represents approximately half of the child care providers statewide receiving state subsidy payments and about half of the eligible children being served by the subsidy program. In 2016, the combined counties of the City of St. Louis, St. Louis County and St. Charles County received nearly $72 million in Child Care Subsidy funds to serve eligible families.

The desired standard is for state subsidy programs to set reimbursement rates at 75% of Market Rate (or 75% of the average cost of child care in the county according to market rate surveys conducted by state administrators every two years). Missouri's 2014 Market Rate Survey shows the wide gap between the monthly market rate for a 4-year-old in a St. Louis County center ($766) and the state reimbursement rate ($369), or 48% of the market rate. In 2016, Missouri increased provider reimbursement rates by 10%. That increase helped narrow the gap, but a significant difference still remains. The 2016 monthly market rate for a 4-year-old in a St. Louis County center is $790 and the current state reimbursement rate is $413, or 52% of the market rate.

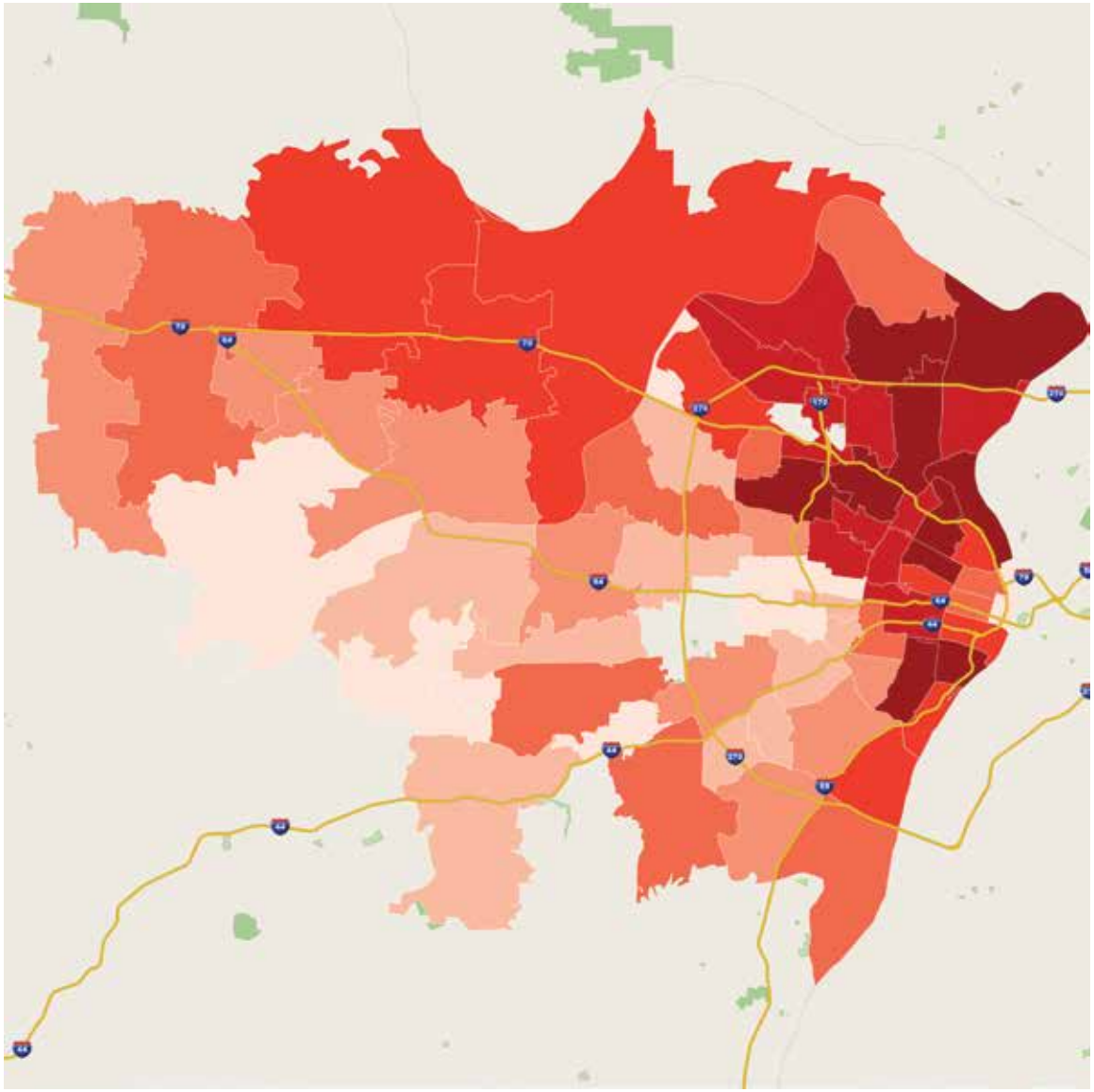
In analyzing the Child Care Subsidy Program in Missouri it is easy to get lost in the intricate details and ins-and-outs of the program, but the root problems are not found there. They are, instead, found in the broader economic dynamics of the subsidy system. Inadequate subsidy support sets up a cycle that undermines provision of and access to quality care from multiple angles.

IMPORTANT CONSIDERATIONS IN THIS REGARD INCLUDE THE FOLLOWING:

- Low subsidy payments by the state do not provide enough assistance in covering the costs of quality care.
- Parents and families who are low-income are unable to make up the difference between the actual market cost of quality care and the amount paid by the state subsidy program.
- Families unable to afford quality care frequently are driven to lower-cost care provided by minimally regulated and likely lower quality child care providers.
- Child care providers receiving low state subsidy payments often lack the financial resources needed to make the investments required to provide quality care.
- Rather than filling child care slots with children bringing low state subsidy payments, providers often decide not to serve those children and fill the slots with children whose families can pay more of the actual cost of care.
- The overall number of child care providers accepting subsidy payments continues to decline.
- Overall the supply of quality child care programs is reduced.

The bottom line is that families – especially those most in need – frequently do not have financial access to quality early childhood programs. Additionally, the dynamics of the marketplace may force trade offs between safety and quality and the cost of care. That dynamic, in the end, may actually reduce the supply of high quality early care and education programs.

Total Subsidy Dollars by ZIP Code



Early Childhood Total Subsidy
(in units of $1,000 USD)

Highest Subsidy	2,600 - 7,179
	1,400 - 2,599
	725 - 1,399
	350 - 724
	180 - 349
	35 - 179
Least Subsidy	2 - 34

NOTE

The following map shows the amount of CCDBG subsidy dollars by ZIP code in the St. Louis region. The ZIP codes colored with darker red show the areas receiving the greatest amount of total subsidy dollars while the ZIP codes colored with lighter red show the areas receiving the least amount of subsidy dollars.

3

Understanding the Detailed Data Presented in the Report Appendix

Whatever else that might be said about the early care and education landscape, it is inarguably complex.

In order to make sense of the detailed data on child care facilities presented in the report Appendix, it is necessary to devote both time and effort to understanding the many elements of the early care and education system and the terms and definitions employed in discussing it. This section of the report is devoted to that task. It is offered in preparation for service providers, policymakers, families and early childhood advocates "diving in" to the detailed data in the report Appendix related to current program offerings. Section 5 of this report is directed to offering conclusions and outlining recommendations to improve and expand current child care offerings in order to build a system in which safe, high quality, affordable care is available to all children. Those findings and recommendations are derived from analysis of the detailed data in the Appendix to the report related to the type, regulatory status, and capacity of current child care facilities. To understand and work effectively in implementing the recommendations made, it is necessary to have a grasp of the current early care and education system.

A. Types of Child Care Facilities

The starting point for understanding the complexities of the early care and education system and the "building blocks" that make up that system is to distinguish between two set of classifications. Those classifications apply simultaneously to facilities providing child care. First there are different **types of facilities** related to the size and nature of the physical settings in which care is provided. Primary classifications in this domain include:

HOMES PROVIDING CHILD CARE

- Homes providing child care – as the name implies these facilities are located in private homes and are constrained in size by state regulations limiting the number of children who can be served at any point in time to 10 unrelated children.

CENTERS PROVIDING CHILD CARE

- Centers providing child care – are institutional facilities usually of a larger size. Typically they range from 20 children up, in some instances to several hundred.

SCHOOLS PROVIDING CHILD CARE

- Schools providing child care – again, as the name implies, these are child care programs operating in school buildings. In terms of the number of children served and the nature of the physical facilities in which they operate, they tend to resemble child care centers, but as explained later in the report, state regulations puts them in their own category of facility type.

Categorizing child care facilities by major type is relatively straightforward and easy to grasp. In moving to a discussion of the r**egulatory status** of these types of facilities, however, the conversation quickly becomes much more complex. The material presented below is intended to offer a primer on the regulatory classifications of child care facilities in the state of Missouri. Hold on to your hats.

B. Regulatory Status

The three major types of facilities listed above all have a status related to the state regulations imposed on them, although in some instances regulatory status is determined by the fact that no regulations are imposed. Missouri has a dizzying array of regulatory categories and the language used to label those categories is often confusing and counter intuitive.

Regulatory status in Missouri includes facilities that are accredited, licensed, license-exempt, exempt registered, operating in schools or by school districts, and those that are voluntary licensed or accredited. (In technical terms, accreditation is not a regulatory status as established by the state. It represents, instead, compliance with the standards established by an accrediting body.) Each of the above is a separate regulatory/accrediting category. Note, again, that regulatory/accrediting status is overlaid on the three primary types of facilities. The following definitions set out the various (and many) regulatory categories for early childhood care and education programs operating in the state of Missouri.

Accreditation

Accreditation is a voluntary certification that denotes programs that meet specific quality standards. Accreditation standards represent the only measure of quality that is currently recognized in Missouri. Missouri recognizes programs accredited by the following state or national accreditation entities: Missouri Accreditation (MOA); National Association for the Education of Young Children (NAEYC); National Association for Family Child Care (NAFCC); National Early Care Professional Association (NECPA); Council on Accreditation (COA); and Council on Accredited Rehabilitation Facilities (CARF). Both center-based and home-based programs may be accredited. They are required to meet their program's state regulatory requirements in addition to achieving the higher standards of accreditation. Facilities in this report are identified as meeting Missouri's current definition of quality standards through their designation of accreditation. In the St. Louis region, less than 5 percent of facilities are accredited and fewer than 20 percent of the total child care slots in the region are in accredited facilities.

Licensing

Licensing is a process through which the State of Missouri evaluates the health and safety of a facility to protect children in center-based and home-based care. The intent of licensing is to ensure that child care facilities are in compliance with the state's child care licensing regulations. Missouri's Department of Health and Senior Services (DHSS) conducts onsite inspections and ongoing compliance monitoring for licensed centers and homes to assess compliance. These health and safety standards include child-to-staff ratios, group size, staff training, director and staff qualifications, supervision, indoor/outdoor environments and equipment, sanitation, immunizations and emergency preparedness. Licensing standards are intended to provide a minimum floor for health, safety and basic program operations. On their own they do not necessarily ensure a high level of quality. Quality standards – established through such processes as accreditation – typically exceed licensing standards in many areas such as professional development, staff qualifications, family engagement, and learning environments. Some licensed facilities may meet quality standards in addition to basic health and safety requirements, but since they are not designated as accredited programs, the total number of high quality licensed programs is currently unknown. In the St. Louis region 18 percent of child care facilities and 40 percent of the total capacity of facilities are licensed.

License-Exempt

License-Exempt programs are those operated exclusively by religious organizations or part-day programs for preschoolers that are operated no more than 4 hours a day. License-exempt programs must comply with many of DHSS's licensing requirements, but not the same child-to-staff ratios, discipline policies, or staff training requirements of licensed programs. In the St. Louis region 5 percent of facilities and 15 percent of the total child care capacity is in facilities that are license-exempt.

Exempt

Exempt programs are not subject to state licensing and are not regulated by the Missouri DHSS. Most major exempt facilities fall under two categories: (1) small home-based providers with less than 5 children in care who are not related to the caregiver (as defined by the state) and; (2) Public/Private Schools/School Districts operating child care or preschools. Other exempt categories include: summer camps, facilities operated by businesses for customer convenience for no more than 4 hours a day, and residential or day programs operated by the Department of Mental Health. Unregulated home-based providers are major suppliers of child care services, but because they are not regulated they are effectively 'invisible." The total number of these providers and the number of children receiving care in such facilities is unknown, but some estimates place the percentage of children receiving child care in these unregulated settings as high as 50 percent.

Registered

Registered homes and centers receive subsidy funds to care for children of eligible families, but are not licensed. This category of child care came into existence in Missouri following enactment of the 1996 Personal Responsibility and Work Opportunities Act ("Welfare Reform"). The intent was to supplement the existing supply of licensed programs with which the state contracted to provide child care for eligible low-income families.

The child care providers functioning as registered vendors with the state and receiving subsidy funds, fall into two categories: "Four or Less" (FOL) homes that are exempt from state licensing requirements or "License-exempt/Religious-in-compliance".

- **Four or Less (FOL)**, which represents the vast majority of registered providers, are small, informal homes, sometimes referred to as "Family, Friend & Neighbor" care, with a legal capacity of four children not related to the caregiver. Registered FOL homes comprise 66% of total facilities, but only 10 percent of the total child care capacity is in facilities registered as FOL homes.
- **License-Exempt**: Part-day preschools or child care programs under exclusive control of a religious organization are also eligible to receive subsidy funds. They receive one annual inspection and must meet some minimal statutory requirements.

NOTE

The 2014 Child Care Development Block Grant (CCDBG) Reauthorization set specific health and safety requirements for all licensed, license-exempt and exempt providers receiving state subsidy funds. A new requirement through the 2014 CCDBG Reauthorization is that the exempt-registered "Four or Less" homes must complete health and safety trainings and agree to follow basic safety checks of an annual onsite visit, with the goal of ensuring greater protections to children in unlicensed child care settings.

Schools and School District Operated Child Care Facilities and Preschools

Schools and School District operated child care facilities and preschools are exempt from licensing by state law. They are required to file an application for school exemption with the Missouri DHSS. The Department of Elementary and Secondary Education maintains statewide enrollment data on school buildings with preschool classrooms.

In the St. Louis region, 72 percent of the total of known child care homes and school facilities, and 26 percent of the total child care capacity, is in such facilities that are exempt from licensing.

Voluntary Licensing and Accreditation

Voluntary licensing and accreditation is available to homes, centers and schools that are not required by state law to be licensed. Several public and private schools in the St. Louis region have become voluntarily licensed and achieved accreditation.

C. The Challenge of Attempting to Assess the Quality of Child Care Offerings

The reference point in this report on the child care landscape in the St. Louis region is that all children in care need to be in high quality early care and education facilities. Assessing quality in a state without a Quality Rating and Improvement System (QRIS) is, at best, a daunting task. The National Center on Early Childhood Quality Assurance defines QRIS as a systemic approach to assess, improve, and communicate the level of quality in early and school-age care and education programs. Similar to rating systems for restaurants and hotels, QRIS awards quality ratings to early and school-age care and education programs that meet a set of defined program standards. By participating in their State's QRIS, early and school-age care providers embark on a path of continuous quality improvement. Even providers that have met the standards of the lowest QRIS levels have achieved a level of quality that is beyond the minimum requirements to operate. Because Missouri, essentially uniquely among the states, does not have a QRIS, imprecise, proxy measures must be used in attempting get a handle on what constitutes quality facilities.

In attempting to address the issue quality early childhood programs and who has access to high quality facilities, this report offers a ZIP code-level snapshot of the supply of existing programs serving ages birth through 5 years. The St. Louis RECC Data Committee then grouped early care and education facilities into categories based on the type of facility as well as the regulatory and programmatic status. The regulatory and programmatic status of the facility includes whether the program is accredited, licensed, license-exempt, exempt, registered/exempt or some combination of these statuses.

While the report does not, and cannot, rate child care programs as being of high quality or not, some assumptions and considerations can be employed in trying to assess quality in the child care landscape in the St. Louis region. In thinking about quality programs, the following can be considered:

- Accredited programs – that must meet high, rigorous standards and be assessed by recognized accrediting bodies – are likely to be of high quality.
- Licensed programs meet long-established standards set out in state regulations. Because they have cleared the bar of meeting state regulations at least a minimum floor has been established and some level of quality might be ascribed.
- Licensed-exempt, exempt and regulated child care facilities are required to meet lesser standards for their operations and in some instances no standards at all. They may be quality programs, but there is not much objective information on which to assess their quality.

While the thoughts outlined above are offered to assist the community in thinking broadly about the quality of early childhood programs and trying to assess the quality of facilities, the suggestions/assumptions cannot be caveated heavily enough. Quality might be found in programs of any regulatory status. On the other hand, a higher regulatory status, such as being licensed, does not ensure that the program is of high quality.

The bottom line on the question of attempting to assess the quality of early care and education programs in the St. Louis region is that, because of Missouri's unique lack of a quality rating and improvement system, there simply is not sufficient sound information on which to make an adequate and reliable assessment of program quality.

D. Other Aspects of the Detailed ZIP Code and School District Data in the Report Appendix

A brief word is in order about other simpler and more straight forward data also included in the detailed data in this report.

Facility Capacity

The capacity of a child care facility is the maximum number of children that the facility can serve. Sometimes that capacity is set by licensing regulations. Capacity is different than the actual number of children being served at a given point in time. For instance the capacity of a facility may be 120 children, but it may only be serving 90 children.

Population

In looking at the child care landscape an important consideration is the number of children in the 0 – 5 age range. The need for child care is driven in part by the size of the population of children who may require care. The number of children in this age range is included in the data table for each ZIP Code and school district. The total population for the ZIP code also is provided.

Racial Composition

Data on racial composition is included in the detailed data reports for three reasons: (1) minority populations tend to be higher need; (2) in many instances minority areas are underserved in terms of the availability of quality child care facilities; and (3) research has demonstrated that high-need populations benefit even more greatly from quality early care services than the general population. The high need of minority populations stems from a wide variety of factors including poverty, lack of employment, housing that is frequently inadequate, lack of opportunities for health care and education, and racial inequity.

Need Scores and Rank

In Section 2B of the report above, the significance of high child care need is addressed and an explanation is provided for how and why an Early Childhood Need Score was developed. In the detailed data tables that make up the Appendix to this report the Need Score for each ZIP Code of school district is included and the tables and maps are presented in rank-order from areas of highest to lowest geographic need.

The Interpretation Key included with sample data at the end of this introductory report indicates where in the data tables information on each of these indicators appears.

4

Overview of Current Early Care & Education Programs in the St. Louis Region

This section of the introductory report offers a high-level overview of the early care and education landscape in the Missouri portion of the St. Louis region that includes the City of St. Louis, St. Louis County and St. Charles County. The information is neither perfect or complete, but it is the best data available at the current time.

This portion of the St. Louis region is home to just under 125,00 children ages birth through 5-years and has an estimated 2,600 early childhood facilities with the capacity to serve approximately 68,000 children. Once again, note the fact that half or more of the children who are in care are in facilities that are unknown. The system of care is complex. The array of early childhood programs is known to families by different names: preschools, child care, day care centers, PreK, in-home day care, and family child care, etc. A wide range of regulatory safety and quality standards exist that are at times nearly indecipherable. In Section 3 of this report an attempt is made to explicate issues related to regulatory status. In summary, less than 30 percent of the known facilities are regulated for health and safety, and less than 5 percent are accredited.

The table to the right presents a high-level overview of the known early care landscape in the three core counties in the Missouri portion of the region. The detailed data included in the Appendix to the report drills down on this summary data and presents individual maps and tables at the ZIP code and school district levels. Going forward there is a need to add more precision and clarity to this picture at both the local and regional level and drill down even further into the data. Recommendations in that regard are outlined in Section 5 of the report.

St. Louis Region Early Care and Education by Facility Type and Status

The following table shows the availability of supply for each of the categories listed for the entire St. Louis region (St. Louis County, St. Louis City and St. Charles County). Facilities are listed by regulatory status (Accredited, Licensed, License-Exempt, Exempt) with the Number and Percentage of the Facilities Count, and the Number and Percentage of Total Capacity.

FACILITY	STATUS	# OF FACILITIES / % OF FACILITIES		CAPACITY / % OF CAPACITY	
Center	Accredited Licensed	107	4%	12,011	18%
Center	Accredited License-Exempt	13	<1%	745	1%
Center	Licensed	339	13%	25,838	38%
Center	License-Exempt	141	5%	9,750	14%
Home	Accredited	3	<1%	30	< 1%
Home	Licensed	157	5%	1,549	2%
Home	Registered/Exempt	1,732	66%	6,928	10%
School	Exempt	149	6%	10,834	16%
TOTAL		2,641		67,685	

NOTE

The analysis of provider supply and number of children treats ZIP codes as distinct geographic units but does not assert that all children receive care and education within the ZIP code in which they reside. While national research shows that the majority of families prefer care arrangements close to home, many children will receive care and education in an adjacent ZIP code or a ZIP code convenient to the child's parent(s) or caregiver(s).

5

Findings, Conclusions and Recommendations to Improve the St. Louis Early Care and Education Landscape

A. Major Findings

In examining data on the known 2,641 facilities and 67,685 child care slots in the St. Louis region, following are some of the highlights of the findings:

- Because of Missouri's lack of a Quality Rating and Improvement System (QRIS), there is not precise, reliable information related to the quality of child care offerings.
- Less than 5 percent of centers and homes are accredited (123 facilities).
- Less than 20 percent of the total capacity of facilities are accredited slots (12,786 slots).
- Nearly 75 percent of known facilities are not regulated by the state related to the health and safety standards required of licensed and license-exempt early childhood programs.
- Approximately 82 percent of the total capacity of child care facilities is of indeterminate quality.
- 16 percent of the total capacity is in exempt school-based programming enrolling 3-5 year olds in PreK classrooms.
- Registered/exempt homes receiving subsidy account for 66 percent of the number of known facilities; however, they represent only 10 percent of estimated capacity. This is due to the limited number of children in registered/exempt homes that may legally enroll, four or fewer children. This estimated number of children does not include relative children, or children who are enrolled but whose care is not reimbursed by subsidy funds.
- The facilities data includes only programs known to oversight and funding agencies (DSS, DHSS, DESE). In every community, the total number and capacity of unlicensed home-based care is unknown. Children who are not enrolled in known facilities are typically cared for by family members or small unlicensed homes with four or fewer children enrolled. It may be the case that half the children or more in care are in "unknown" facilities.

B. Conclusions and Recommendations

Ultimately, the purpose of this child care landscape report is to improve the system of early care and education in the St. Louis region and to increase access for all children to high quality programs. There is a particular focus on increasing provision of quality care to those children and families who are most in need of such care and least likely to receive it. This report is offered to establishing an informational foundation for devising and implementing strategic community action directed to those ends.

The conclusions and recommendations outlined below are based on the data and findings in this report, as well as the closely related work of the program committees of the St. Louis Regional Early Childhood Council. Those program committees are focused on early childhood issues that include (1) community resources and family engagement; (2) early care and education; (3) health and mental health; (4) public awareness and advocacy; and (5) building an early childhood data system. The October 2017 St. Louis Metropolitan Early Childhood Summit and the Regional Early Childhood Development Action Plan that will be a product of that community summit can serve as vehicles to move this report's recommendations forward.

Conclusion # 1

Quality early child care and education is vitally important to the well-being of both individual children and development of the broader St. Louis region, yet provision of quality care does not rank as a high civic priority. Moreover, the system through which early care services are provided is weak and so complex that it is difficult to understand. Improving our current early childhood education system will require an even greater understanding of the early childhood landscape than is offered here.

RECOMMENDATIONS:

- Conduct public awareness and advocacy initiatives directed to establishing the critical importance of early childhood development. Include parents and families, business and civic leaders and policymakers.
- Facilitate neighborhood, school district and municipal level focus groups to identify barriers to safe, affordable, quality early childhood options and develop strategies to improve the workings of the early care and education system with attention to fostering partnership opportunities.

Conclusion #2

This report provides the best currently available information, but it is only a starting point. More information is needed on the local early care and education system and key data that is collected needs to be maintained and analyzed on an ongoing basis. Just as revealing as what is now known about early childhood care and education in the St. Louis area as a result of this analysis, is what remains unknown. For the vast majority of early care and education programs, we do not have enough information to evaluate the quality of care facilities provide. For some types of care, there is not adequate information to gauge even the safety of the facilities. Knowing the gaps in available information can inform efforts and discussions relating to safety and quality that are currently occurring at the state level.

RECOMMENDATIONS:

- Track progress on facilities located in high-need areas to answer such questions as whether there is an increase in exempt programs becoming licensed and if there is an increase in licensed programs becoming accredited. Specifically, in conjunction with IFF, carry out more in-depth research to provide richer and more detailed information on the early care landscape related to supply and demand for care, quality of care, cost of care and populations who are not well served. This analysis should focus particularly on areas of high need.
- Through the work of the Regional Early Childhood Council Data Committee and other community partners with experience and expertise in data collection and analysis, develop and sustain an early childhood data system for the St. Louis region that can inform program and policy development. Among the key functions such a data system can perform include: (1) tracking results of registered "Four or Less" exempt home inspections for health and safety compliance. ("Four or Less" homes who fail inspections will no longer be eligible for state subsidy funds under new CCDBG guidelines.); and (2) Tracking data on facilities offering services to high-needs families; i.e., families requiring non-traditional work schedules and transportation.

Conclusion #3

Currently there are significant shortcomings and gaps in the early care and education system that must be addressed through improved policies and programs directed to enhancing funding, creating new facilities, expanding existing facilities and promoting high quality care. Major problems to be addressed include: (1) lack of information on program quality coupled with lack of sufficient resources to improve quality; (2) a child care subsidy system that does not provide sufficient resources to support quality care and which, in the context of the marketplace, may actually serve to impede access to quality programs; and (3) complicated funding streams and regulatory processes. Many, indeed most, of these issues involve state policies and programs and, therefore, must be addressed in the context of efforts underway at the state level to improve the child care system. Specifically, local efforts to build a system of high quality early care and education should be coordinated with Missouri's evolving Early Childhood Comprehensive Systems Plan. The purpose of that state initiative is to build and implement a statewide early childhood comprehensive system that supports families and communities in their development of children that are healthy and ready to learn at school entry.

RECOMMENDATIONS:

- Bring Missouri in line with policies and practices being pursued in all other states and establish a Quality Rating and Improvement System (QRIS.) That system could be built out from the foundation of the state's current pilot program to promote quality care.
- Increase child care subsidy payments to better support provision of quality care. Raise the subsidy program reimbursement rate to help bridge the gap between the market rate of programs and state subsidy payments in order to reduce the co-payment burden on families. A raise in the subsidy also should be structured to provide an increase in revenue that will enable providers to support improved staffing and facility upkeep.
- Make eligibility levels for the subsidy program less stringent so more families in need qualify and make the application process more user-friendly so that it does not prevent families from securing assistance. An increase in child care subsidies will increase revenues for child care providers and will better enable them to improve staff quality and facility upkeep and upgrades.
- Maintain and update the data related to early childhood revenues and program operations that is set out in the 2017 Missouri Budget Project report, *Budget Basics: Child Care & Early Childhood Education*. Employ similar data to do an analysis of child care revenues, sources and program operations in the St. Louis region.

Conclusion #4

Improvements are needed in almost all settings in which early care and education are provided. In a complex, multi-faceted early care system, stakeholders of all types can and should play a role. An intentional community conversation should be initiated that focuses on the roles that each type of child care provider can appropriately play and how providers of all sizes, types and regulatory status can work to improve the safety and quality of services they provide for our region's children.

RECOMMENDATIONS:

- Set staff-child ratios and group sizes that are appropriate and meet industry standards.
- Provide the financial resources and technical assistance required to allow providers to maintain the health and safety standards required by licensing.
- Provide resources and technical assistance to assist providers in taking take steps toward achieving higher quality in areas of professional development and learning environments.

Conclusion #5

New mechanisms are need to spur investment in building a high quality early care and education system. The costs of quality early care and education are high and state government agencies have constraints – albeit sometimes self-imposed – on the revenues available to invest in quality care. In many metropolitan areas the private sector has established funds to promote quality early care which is recognized as being in the interests of their own businesses, as well as those of individual children and the broader civic community. Public-private partnerships can be established to provide mechanisms for increasing needed investment in early childhood development.

RECOMMENDATIONS:

- Joint efforts of the Regional Early Childhood Council and St. Louis Regional Chamber to establish an investment fund to support quality early childhood education should continue to be pursued. Focus should be on finalizing details related to the nature and operations of the fund being established and on securing financial resources to be placed into the fund.

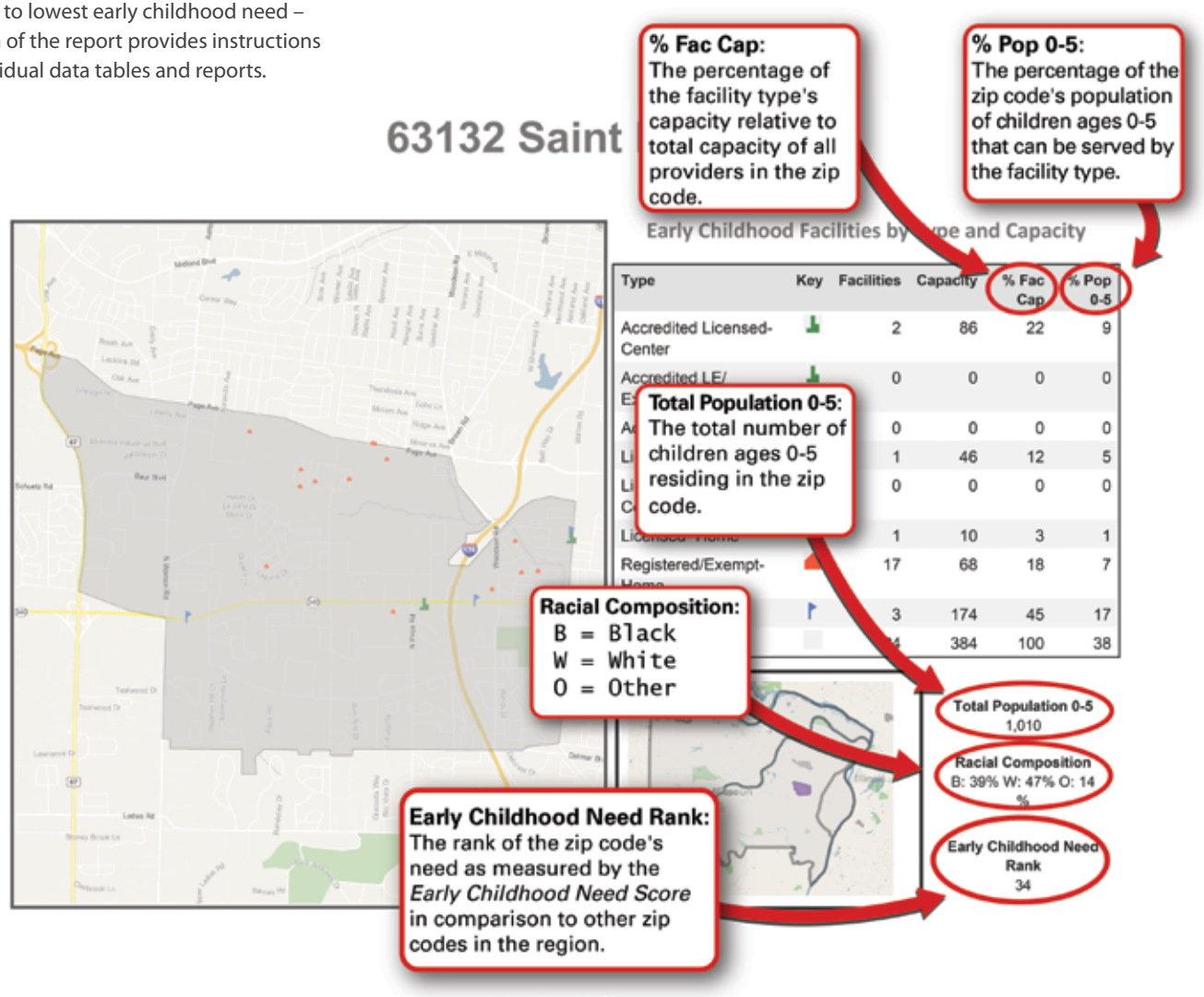
Samples of the Detailed Data Presented in the Appendix to the Report

So, with all of this introduction, the question of moment is, "What does the early childhood facilities and demographic data presented in the report Appendix look like?" Samples of that data – and related tools, that include an Interpretation Key for the data, as well as a rank-ordering of ZIP codes from highest to lowest early childhood need – are offered on the following pages. The final section of the report provides instructions on how to get access to the full set of detailed individual data tables and reports.

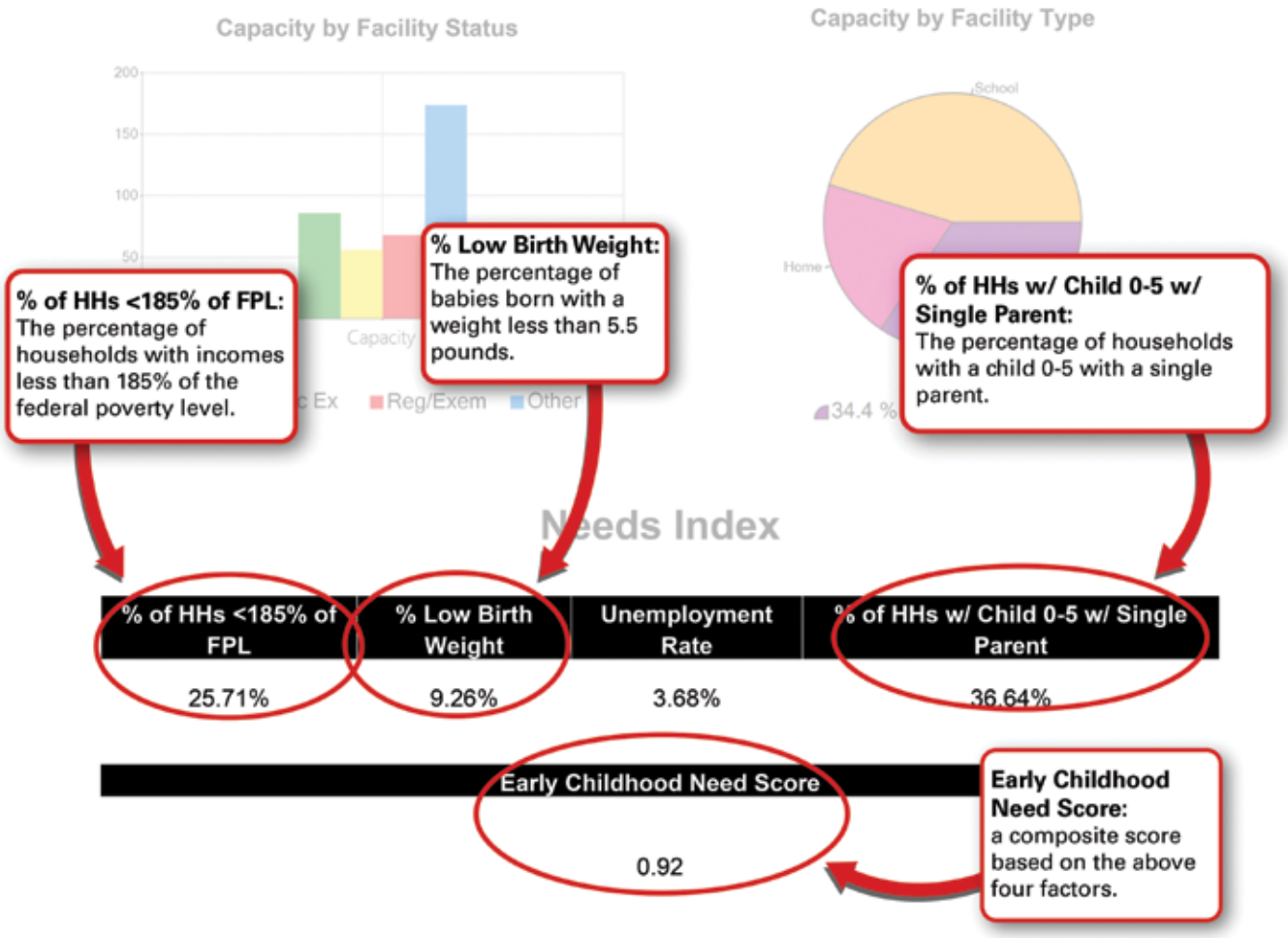
THE FOLLOWING ITEMS INCLUDE:

- Interpretation Key for the data tables and maps
- Sample **ZIP Code** level maps, data tables and charts for one of the 68 ZIP codes for which data is included in the Appendix
- Sample **School District** maps, data tables and charts for one of the 28 school districts for which data is included in the Appendix
- Table ranking ZIP codes from highest to lowest related to the Early Childhood Need Score that was developed
- Table listing ZIP codes in numerical order from lowest to highest ZIP code number to provide easy access to information on the Needs Score and comparative rank of individual ZIP codes.

Interpretation Key for the Maps



Interpretation Key for the Data Tables

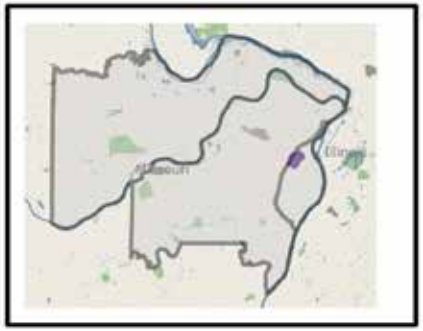


Sample for the ZIP Code Level Maps for ZIP Code 63120

63120 Saint Louis

Early Childhood Facilities by Type and Capacity

Type	Key	Facilities	Capacity	% Fac Cap	% Pop 0-5
Accredited Licensed-Center		3	188	24	20
Accredited LE/ Exempt-Center		0	0	0	0
Accredited-Home		0	0	0	0
Licensed-Center		4	220	28	24
License Exempt-Center		2	59	7	6
Licensed-Home		6	60	8	6
Registered/Exempt-Home		39	156	20	17
School		3	112	14	12
Total		57	795	100	85



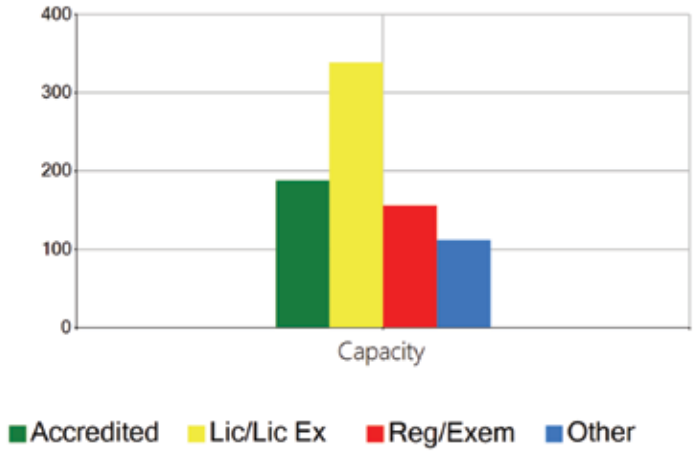
Total Population 0-5
936

Race Composition
B:96% W:2% O:2%

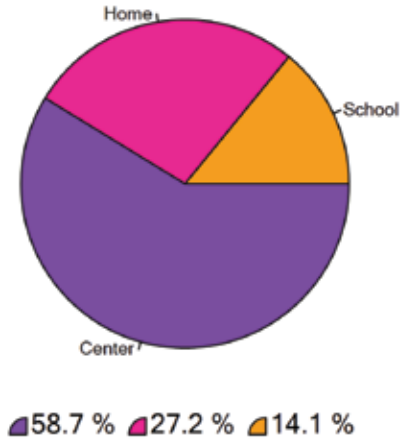
Early Childhood Need Rank
1

Sample for the ZIP Code Level Data Tables for ZIP Code 63120

Capacity by Facility Status



Capacity by Facility Type



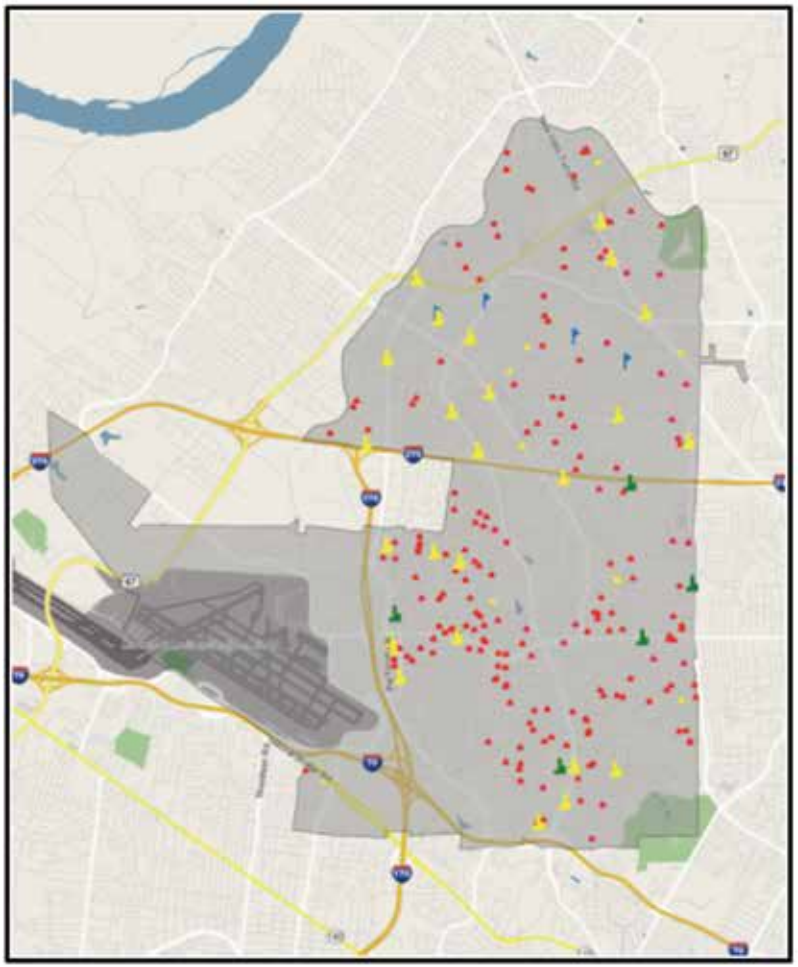
Needs Index

59.13%	23.02%	16.27%	82.73%

Early Childhood Need Score
2.51

Sample for the School District Maps for Ferguson-Florissant School District

Ferguson-Florissant

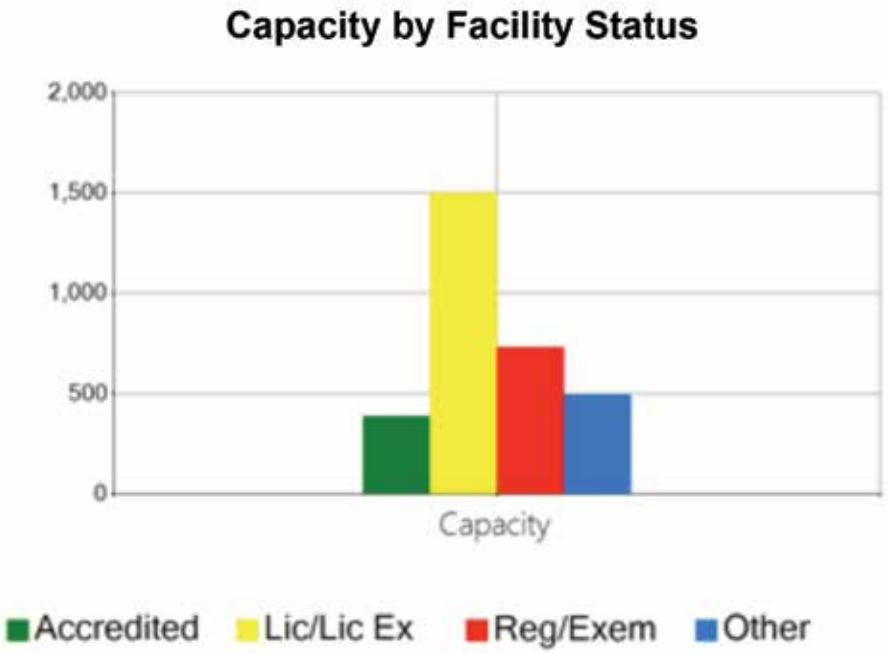


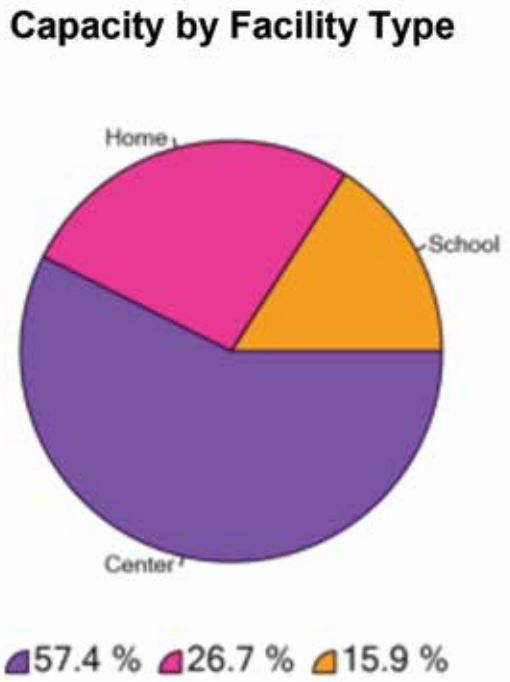
Early Childhood Facilities by Type and Capacity

Type	Key	Facilities	Capacity	% Fac Cap	% Pop 0-5
Accredited Licensed-Center		5	389	13	7
Accredited LE/Exempt-Center		0	0	0	0
Accredited-Home		0	0	0	0
Licensed-Center		20	1,109	36	20
License Exempt-Center		5	293	9	5
Licensed-Home		10	100	3	2
Registered/Exempt-Home		183	732	24	13
School		4	496	16	9
Total		227	3,119	100	56

Total Population Ages 0-5
5,535

Sample for the School District Data Tables for Ferguson-Florissant School District





Zip Code Rankings on Early Childhood Need Score: Highest to Lowest Need

Zip Code	Area	Needs Score	Rank
63120	St. Louis	2.51	1
63106	St. Louis	2.36	2
63133	St. Louis	2.32	3
63107	St. Louis	2.28	4
63113	St. Louis	2.23	5
63140	St. Louis	2.18	*
63147	St. Louis	2.18	6
63115	St. Louis	2.17	7
63136	St. Louis	2.05	8
63137	St. Louis	1.89	9
63134	St. Louis	1.86	10
63121	St. Louis	1.81	11
63111	St. Louis	1.79	12
63118	St. Louis	1.79	13
63138	St. Louis	1.71	14
63135	St. Louis	1.68	15
63112	St. Louis	1.60	16
63103	St. Louis	1.53	17
63108	St. Louis	1.48	18
63104	St. Louis	1.31	19
63114	St. Louis	1.27	20
63116	St. Louis	1.27	21
63042	Hazelwood	1.22	22
63110	St. Louis	1.21	23
63033	Florissant	1.19	24
63074	St. Ann	1.17	25
63034	Florissant	1.10	26
63125	St. Louis	1.00	27
63301	St. Charles	1.00	28
63031	Florissant	0.99	29
63044	Bridgeton	0.99	30
63143	St. Louis	0.98	31
63105	St. Louis	0.97	32
63130	St. Louis	0.93	33
63386	West Alton	0.92	*
63132	St. Louis	0.92	34
63088	Valley Park	0.84	35
63123	St. Louis	0.79	36
63366	O'Fallon	0.79	37
63348	Foristell	0.78	38
63043	Maryland Hgts.	0.76	39
63109	St. Louis	0.76	40
63127	St. Louis	0.76	41
63146	St. Louis	0.76	42
63139	St. Louis	0.72	43
63026	Fenton	0.70	44
63367	Lake St. Louis	0.70	45
63303	St. Charles	0.69	46
63385	Wentzville	0.67	47
63341	Defiance	0.65	48
63117	St. Louis	0.64	49
63128	St. Louis	0.64	50
63119	St. Louis	0.62	51
63304	St. Charles	0.62	52
63129	St. Louis	0.61	53
63040	Grover	0.59	54
63126	St. Louis	0.58	55
63021	Ballwin	0.57	56
63376	St. Peters	0.56	57
63368	O'Fallon	0.56	58
63025	Eureka	0.55	59
63122	St. Louis	0.55	60
63144	St. Louis	0.55	61
63038	Glencoe	0.54	62
63011	Ballwin	0.51	63
63124	St. Louis	0.51	64
63017	Chesterfield	0.48	65
63141	St. Louis	0.43	66
63005	Chesterfield	0.40	67
63131	St. Louis	0.40	68

**No facilities*

Numerical Listing of Zip Codes: Early Childhood Needs Score & Comparative Rank

Zip Code	Area	Needs Score	Rank
63005	Chesterfield	0.40	67
63011	Ballwin	0.51	63
63017	Chesterfield	0.48	65
63021	Ballwin	0.57	56
63025	Eureka	0.55	59
63026	Fenton	0.70	44
63031	Florissant	0.99	29
63033	Florissant	1.19	24
63034	Florissant	1.10	26
63038	Glencoe	0.54	62
63040	Grover	0.59	54
63042	Hazelwood	1.22	22
63043	Maryland Hgts.	0.76	39
63044	Bridgeton	0.99	30
63074	St. Ann	1.17	25
63088	Valley Park	0.84	35
63103	St. Louis	1.53	17
63104	St. Louis	1.31	19
63105	St. Louis	0.97	32
63106	St. Louis	2.36	2
63107	St. Louis	2.28	4
63108	St. Louis	1.48	18
63109	St. Louis	0.76	40
63110	St. Louis	1.21	23
63111	St. Louis	1.79	12
63112	St. Louis	1.60	16
63113	St. Louis	2.23	5
63114	St. Louis	1.27	20
63115	St. Louis	2.17	7
63116	St. Louis	1.27	21
63117	St. Louis	0.64	49
63118	St. Louis	1.79	13
63119	St. Louis	0.62	51
63120	St. Louis	2.51	1
63121	St. Louis	1.81	11
63122	St. Louis	0.55	60
63123	St. Louis	0.79	36
63124	St. Louis	0.51	64
63125	St. Louis	1.00	27
63126	St. Louis	0.58	55
63127	St. Louis	0.76	41
63128	St. Louis	0.64	50
63129	St. Louis	0.61	53
63130	St. Louis	0.93	33
63131	St. Louis	0.40	68
63132	St. Louis	0.92	34
63133	St. Louis	2.32	3
63134	St. Louis	1.86	10
63135	St. Louis	1.68	15
63136	St. Louis	2.05	8
63137	St. Louis	1.89	9
63138	St. Louis	1.71	14
63139	St. Louis	0.72	43
63140	St. Louis	2.18	*
63141	St. Louis	0.43	66
63143	St. Louis	0.98	31
63144	St. Louis	0.55	61
63146	St. Louis	0.76	42
63147	St. Louis	2.18	6
63301	St. Charles	1.00	28
63303	St. Charles	0.69	46
63304	St. Charles	0.62	52
63341	Defiance	0.65	48
63348	Foristell	0.78	38
63366	O'Fallon	0.79	37
63367	Lake St. Louis	0.70	45
63368	O'Fallon	0.56	58
63376	St. Peters	0.56	57
63385	Wentzville	0.67	47
63386	West Alton	0.92	*

**No facilities*

7

Accessing the Detailed Early Care and Education "Building Blocks" Data

This introductory report is offered by way of preamble and to provide context for the detailed "building blocks" data presented in the Appendix that is the backbone for the early care and education landscape report. The detailed data is extensive, providing two-page charts and maps for each of the individual 68 ZIP codes and 28 school districts in the three core counties of the Missouri portion of the St. Louis metropolitan area.

Given the volume of that data, it is not practical to include and disseminate that information to a broad audience in a printed report. In point of fact, the detailed data is probably of primary interest to a relatively limited audience – those who want to roll up their sleeves and do a deep dive into the data for use in analyzing the child care landscape in particular local geographies and for developing policy and program strategies to improve the overall workings of the early care and education system in the St. Louis region.

The detailed tables and maps for all the individual ZIP codes and school districts in the three-county region – City of St. Louis and St. Louis and St. Charles counties – can be accessed on the St. Louis Regional Early Childhood Council website at: www.stlearlychildhood.org.

THERE ARE FOUR ELEMENTS TO THE DETAILED DATA:

- Interpretation Key
- Detailed Data for 68 Individual ZIP Codes
- Detailed Data for 28 Individual School Districts
- List Rank-Ordering ZIP Codes from the Highest to Lowest Early Childhood Need Score
- Easy-Reference List with a Numerical Listing of ZIP Codes from the Lowest to Highest ZIP code number

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