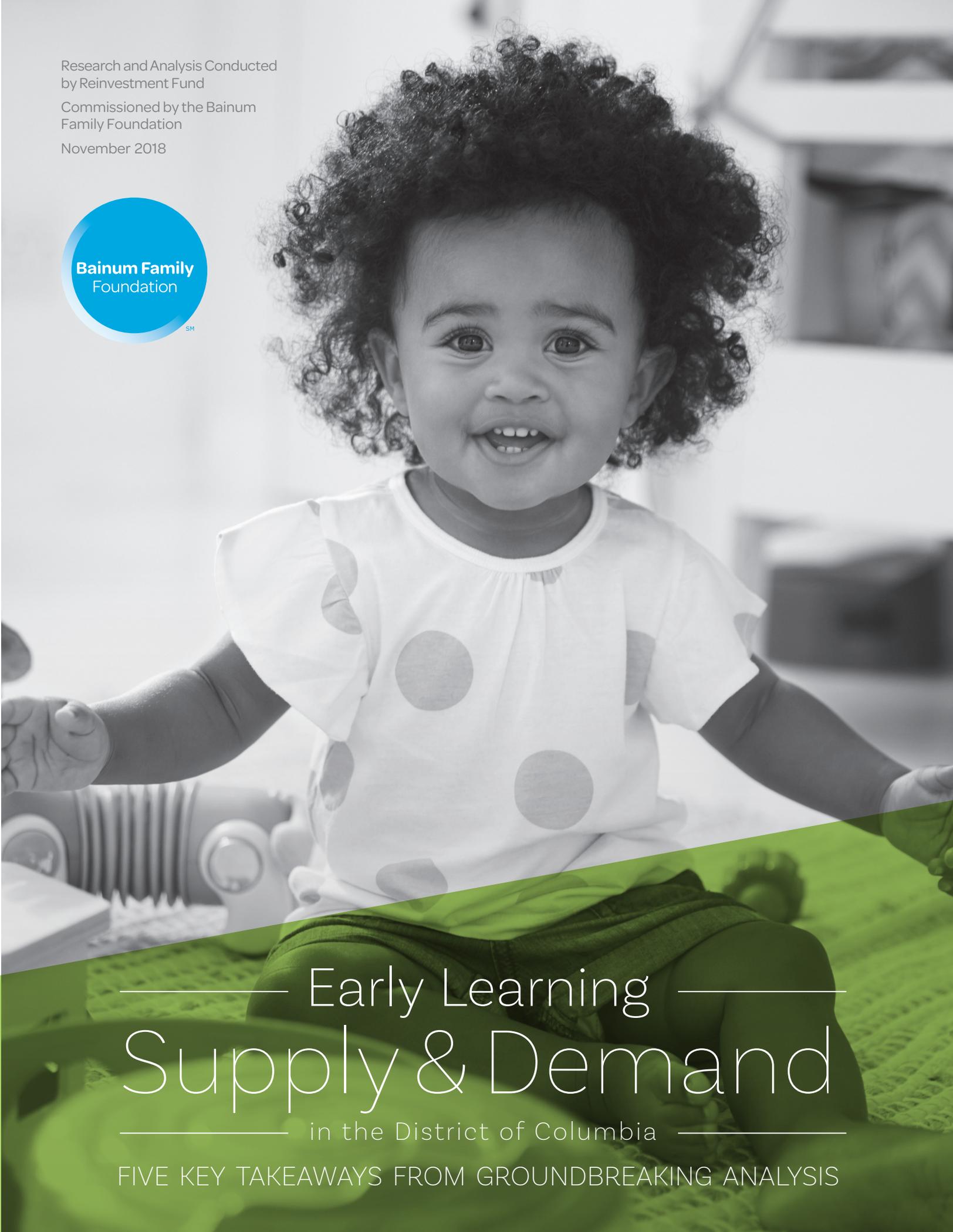


Research and Analysis Conducted
by Reinvestment Fund

Commissioned by the Bainum
Family Foundation

November 2018



Early Learning Supply & Demand

in the District of Columbia

FIVE KEY TAKEAWAYS FROM GROUNDBREAKING ANALYSIS



The first three years of a child’s life shape every year afterward. This unique developmental window, when 85% of brain growth occurs, lays the foundation for all future learning, behavior and health, putting a child on a trajectory toward success in school and life or, in too many cases, a future in which the child does not fulfill his or her full potential. That’s why high-quality early learning is critical to a child’s healthy development and long-term well-being.

A new analysis commissioned by the Bainum Family Foundation and conducted by Reinvestment Fund provides the first comprehensive look at what the District of Columbia has, and what it lacks, in terms of early learning capacity and quality – and which parts of the community are most affected by existing gaps.

This information – especially when considered with other local data, such as Early Development Instrument (EDI) outcomes for District children – is designed to help policymakers, funders, providers and advocates make data-informed decisions about where resources and interventions are needed most. It also can help parents understand local early learning options and make the best decisions for their families.

Key Takeaways

The analysis findings are captured in a report, “Early Learning Supply & Demand in the District of Columbia: Using Data to Identify Critical Gaps.” Following are five key takeaways from the report. (See the **Important Definitions** section for explanation of the terminology used here.)

1. **Overall shortage** – Across the District, there are currently 8,214 seats for infant and toddler early learning and a maximum estimated demand of 36,571 seats, resulting in an absolute shortage of 28,357 seats, with demand for early learning outpacing supply in every ward. This scenario assumes that every child under age 3 in the District needs an early learning seat. It also includes demand of 9,414 seats

due to commuting (13,721 children commuting into the District with parents/guardians who work in the District and seek early learning near their places of work, minus 4,307 children commuting out with parents/guardians who work in nearby states). (See pages 14 and 21 of the report.)

Baseline Scenario: Gap Between Formal Seats and Maximum Demand by Ward, Washington, D.C.

Ward	Supply of Formal, Regulated Seats	Maximum Potential Demand	Gap Between Formal Seats and Maximum Demand
Ward 1	839	2,583	1,744
Ward 2	1,705	9,961	8,256
Ward 3	460	2,838	2,378
Ward 4	1,248	3,450	2,202
Ward 5	1,062	3,645	2,583
Ward 6	719	5,062	4,343
Ward 7	894	3,644	2,750
Ward 8	1,287	5,387	4,100
Citywide	8,214	36,571	28,357

2. **High-quality shortage** – The analysis also assessed the supply and demand of high-quality early learning seats in the District, with 166 of the District’s current 382 early learning sites serving infants and toddlers meeting one of more of the study’s definition of high quality. There are currently 5,373 high-quality early learning seats for infants and toddlers. With maximum potential demand at 36,571, that produces an absolute shortage of 31,198 high-quality seats. (See pages 13 and 22 of the report.)

3. **Income implications** – Although the shortage of infant and toddler care affects nearly all District neighborhoods, it does not affect them all in the same way. Families with low incomes bear a disproportionate burden, and their needs should be prioritized. Across the District of Columbia, for example, 32% of infants and toddlers live in a census block group where the cost of a center-based early learning program exceeds 50% of median household income. (See page 9 of the report.)

Important Definitions

The analysis is based on specific definitions of supply, demand, shortage and quality, and it uses U.S. census block groups (larger than a city block but smaller than a census tract) as a geographic measure.

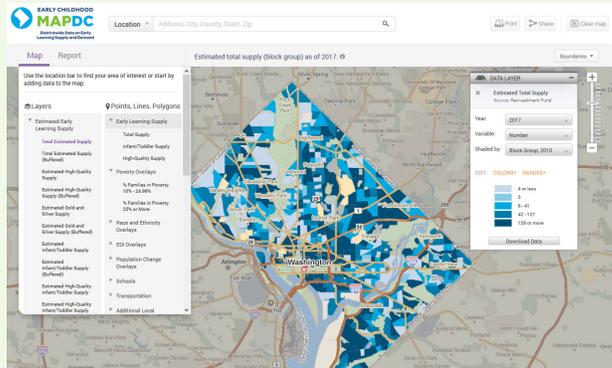
- **Demand** – The analysis uses a “maximum demand scenario” that assumes there will need to be an early learning seat for every child in a given age group (such as 0 to 3) in the District. Demand then is adjusted for parents/guardians who commute into and out of the District and seek early learning for their children near their places of work. (See page 14 of the report.)
- **Supply** – Nine local datasets were combined to create the most comprehensive list possible of formal, regulated or licensed early learning programs operating in the District. Important to note, this data does not reflect care provided by relatives, neighbors, friends or in-home providers, such as nannies or au pairs. (See page 17 of the report.)
- **Shortage** – The analysis captures both absolute shortage of early learning seats (demand minus supply) and relative shortage (the difference between the observed supply in a block group and a block group’s expected supply given the level of demand in the block group). (See page 20 of the report.)
- **Quality** – Working with a stakeholder group of D.C. early learning experts, researchers identified several indicators that were generally agreed to designate quality in an early learning program. Programs had to meet at least one of these indicators to be considered high quality. (See page 13 of the report.)

4. **From analysis to action** – The new analysis already is being used by the Bainum Family Foundation and the District of Columbia to guide investments related to early learning facility

improvements and seat creation. But more can and should be done to improve the odds for the District’s youngest residents. Changing the current situation will require commitment by a wide range of stakeholders, including policymakers, business leaders, providers, parents, funders and advocates for children and families. District leaders must assess each neighborhood and understand whether it needs improved access, higher quality, better affordability or – most likely – a mix of these. This analysis can serve as the beginning of such assessments, leading to investments and interventions tailored to each neighborhood’s localized needs. (See page 25 of the report.)

5. Data limitations – When studying early learning supply and demand, several challenges arise. No single data source contains a comprehensive list of early learning programs in D.C., so multiple sources were combined to reach the supply estimate. This data includes formal, regulated or licensed care but not care provided by relatives, neighbors, friends or in-home providers, such as nannies or au pairs. When estimating demand, researchers must contend with limited information on parental preferences and the shifting dynamics of local markets, which may factor into how and where parents seek early learning. Further, it is difficult to precisely evaluate the quality of programs beyond those participating in the District’s official quality rating and improvement system (QRIS). Therefore, the analysis findings are presented as estimates of the District’s current early learning landscape, based on available data as of late 2017. (See page 12 of the report.)

While the report focuses primarily on the findings and implications for infants and toddlers (defined as birth up to age 3), researchers also collected and analyzed data for 3- and 4-year-olds, and the report’s appendix contains insights for this “0 to 5” age range as well. (See page 27 of the report.)



Data at Your Fingertips

Early Childhood Map DC is an interactive online map, based on the analysis findings, that allows you to explore the supply of and demand for early learning seats across the District of Columbia. It provides valuable insights for all early learning stakeholders, helping to answer critical questions such as:

- Where should I locate my new early learning center to meet the greatest need?
- Where should we target our investments in high-quality early learning?
- Where are the high-quality early learning centers near where I work or live?
- What steps will move us toward educational equity in the most high-poverty D.C. communities?

Watch a short video tutorial and explore the map at www.ecmapdc.org.



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