
Oregon's Child Care Deserts 2020: Mapping Supply by Age Group and Percentage of Publicly Funded Slots

Prepared for the **Oregon Early Learning Division**

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Oregon's Child Care Deserts: Mapping Supply by Age Group, Metropolitan Status, and Percentage of Publicly Funded Slots

Abstract

Many families with young children live in what experts have defined as a *child care desert*, a community with more than three children for every regulated child care slot. This is a follow-up report to the first report on child care desert status of Oregon's counties as of 2018. As of March 1, 2020 (pre-COVID-19), using the child care desert standard, families with infants and toddlers in every Oregon county still live in a child care desert. The picture is only slightly better for families with preschool-age children; families in 25 of 36 counties live in a child care desert. In addition, higher percentages of preschool slots are publicly funded as compared to infant/toddler slots. The majority of Oregon's child care supply is parent-funded (tuition and fees); public funding makes up less than a quarter of slots across the state. Nonmetropolitan counties tend to have a higher proportion of public slots compared to metropolitan counties. The current report focused on child care supply – how available child care is in a community. These findings should be considered along with additional information about affordability and quality of child care to better understand the extent to which Oregon's child care is equitably meeting children and families' needs. This study provides a starting place for considering the multifaceted issues that shape a family's access to child care. For one-pager overview of results, see [page 18](#).

Introduction

Oregon families, especially those with infants and toddlers, struggle to find care and education for their children. In addition to their concerns about quality and affordability, families often struggle just to find an arrangement. Supply is a measure of how much child care is available in a geographic region that families that region could *potentially access*¹. National experts² define a child care desert as a community with more than three children for every regulated child care slot. That is, 33% or fewer children in a community have *potential access* to a slot. Policy makers have joined families in expressing concerns about the adequacy of the child care supply; the COVID-19 pandemic accentuated this concern

In this report, we define infants and toddlers as children ages birth through the end of age 2, and preschool-age children as children age 3 through the end of age 5.

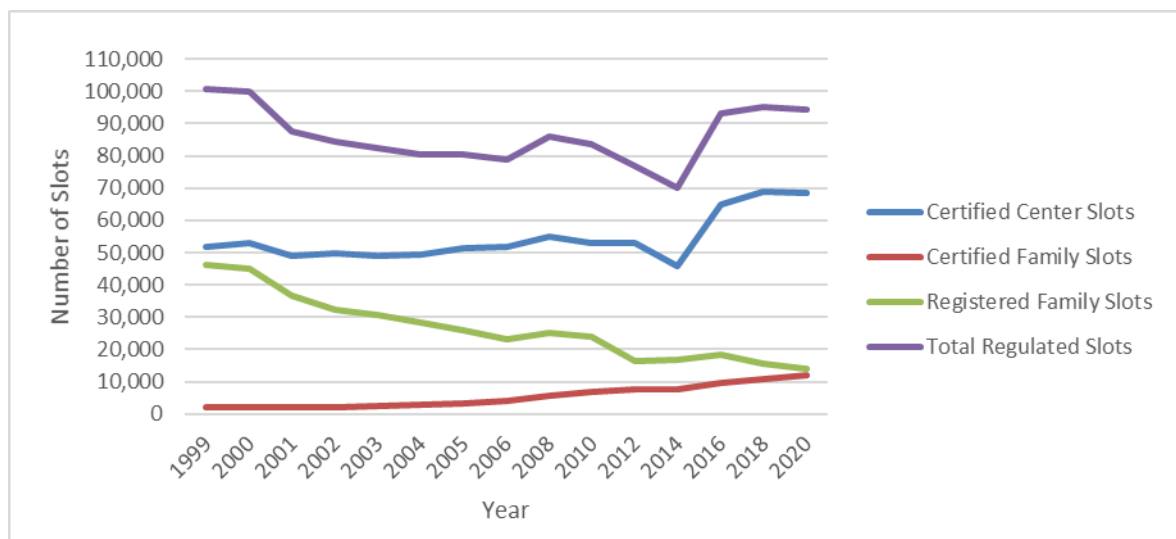
We define parents broadly as all types of primary caregivers, such as parents, grandparents, and foster parents.

¹Child care access is multidimensional and many factors shape a family's access to care; supply is one factor. For more information of the different dimension of access see the [Access Guidebook](#).

²Malik, R., Hamm, K., Schochet, L., Novoa, C., Workman, S., & Jessen-Howard, S. (2018, December 6). [America's child care deserts in 2018](#).

An inadequate supply of child care is not a new problem in Oregon. The Oregon Child Care Research Partnership (OCCRP) has been studying child care supply since the 1990s. The following graph shows that, although the number of child care slots in centers and large family (certified) child care homes have been steadily growing since 1999, the number of slots in small family (registered) child care homes has steadily declined. Between 1999 and early 2020, the total number of child care slots for children under age 13 declined by approximately 6,000 slots. The number of slots in centers and large family child care homes increased by approximately 26,000 slots, but the numbers in small family child care homes decreased by approximately 32,000 slots. The total number of slots was lowest in 2012 and has been steadily growing since that time, but remains 6,000 slots below 1999 levels. Growth in center and large home-based care has not made up for the decline in small home-based care. Families struggle to find care for their young children across the state, and policy makers want to understand the child care supply as it will help identify strategies likely to be successful.

**Figure 1: Regulated Oregon Child Care Supply for Children under Age 13:
1999-2020**



In January 2019, the Oregon Child Care Research Partnership in partnership with Oregon’s Early Learning Division (ELD) published Oregon’s first report on child care deserts³ by age group (infant/toddler versus preschool-age children) and funding source (public versus non-public funding of slots). The current report is a follow-up to identify the child care deserts status of Oregon counties as of early 2020 (pre-COVID⁴). As a baseline prior to the pandemic, this report provides a useful starting point to assess the impact of the pandemic on Oregon’s early care and education over time.

³ Pratt, M., Sektanan, M., & Weber, R. B. (2019, January). [Oregon’s child care deserts: Mapping supply by age group, metropolitan status, and percentage of publicly funded slots](#). Corvallis, Oregon: Oregon State University, College of Public Health and Human Sciences.

⁴ In response to COVID-19 global pandemic, Governor Kate Brown declared a State of Emergency in Oregon on March 8, 2020. On March 25, 2020, child care providers were ordered to close unless they were providing Emergency Child Care (ECC). The COVID pandemic and resulting closures have greatly changed the landscape of the child care supply in Oregon. Although the full effects will not be known for some time, it is expected that many providers may not re-open and much of the child care workforce may have detached from child care (Early Learning Division, May 2020). As a baseline prior to the pandemic, this current report describes the supply of child care as of March 1, 2020 (pre-COVID).

In defining deserts, Oregon researchers used the definition of more than three children per regulated child care slot at the county level. By working with partners, OCCRP was able to create a child care supply dataset that included information on the population of children in a county by age group and number of slots by age group, as well as data on whether or not slots were publicly funded.

In this report, we define a *child care desert* as a county with more than three children for each regulated child care slot.

What this dataset enabled us to discover is which geographically-defined communities have an adequate child care supply and which geographically-defined communities do not, according to the child care desert metric. For example, we will be able to answer the question, “Do some Oregon counties have more adequate child care supply than others?” We expect there to be geographic variation, because prior research has revealed that child care supply is relatively more adequate among urban compared to rural communities⁵. What we cannot determine from analyzing this dataset is which children and families are able to afford and use the available child care supply and which children and families are not. For example, we cannot answer questions such as, “Do African American and Black families have adequate access to high quality, affordable child care that meets their needs?” or “Do families with children experiencing disabilities and/or chronic health care needs have adequate access to high quality, affordable child care that meets their needs?” While we recognize that these are important questions to answer, it is beyond the scope of the current dataset to do so (see Study Implications and Next Steps for a discussion on how other recent Oregon research efforts are addressing systemic inequities in child care access).

In the current study, we look at how supply and public funding vary by age and county. Using this dataset, we address the following questions:

1. How adequate is Oregon’s child care supply for children ages five and under? Specifically, how many counties are child care deserts? How does the supply of preschool-age care compare with that for infants and toddlers? How has this changed since 2018?
2. What percentage of child care slots are publicly funded? Does the percentage vary by age group served? Has public investment changed since 2018?

Methods

The child care supply analyses reported here relied on numerous data sources, but the foundational dataset was the Estimating Supply (ES) dataset put together by Oregon State University (OSU). To create this dataset, OSU worked with Central Coordination at Western Oregon University. First, licensing data (Child Care Regulatory Information System) and Child Care Resource & Referral (NACCRRAware) databases were merged to ensure all child care facilities were included. Then Central Coordination managed a data update process in which data on capacity and price by age group were collected from all Oregon child care facilities

⁵ Pratt, M, Weber, B., Sektnan, M., Caplan, S., Houston, L. (2020, September) [Supply and Demand in Oregon: How Equitable is Child Care Access](#). Corvallis, Oregon: Oregon State University, College of Public Health and Human Sciences.

within a four-month period to ensure all data were comparable and current. Central Coordination provided the updated data to OSU for use in multiple studies. Of relevance for these analyses, the dataset included data on each facility's regulatory status and desired capacity by age group as of March 1, 2020 (pre-COVID).

For the purpose of this report, the supply of child care includes regulated (licensed) slots in Certified Centers, Certified Family homes, and Registered Family homes, as well as a few license-exempt and recorded facilities that receive public funding.⁶ We will refer to this as the regulated supply throughout this report.

Based on this definition, Oregon had an estimated 67,981 regulated child care slots for young children ages 0-5 in 2020 (pre-COVID), with 73% of slots in centers, 15% slots in large (certified) home-based care, and 12% in small (registered) home-based care. Non-metropolitan⁷ counties have a similar percentage of center slots (75% vs. 72% metro), slightly larger percentage of small home-based care (16% vs. 12% metro), and fewer large home-based facilities (8% vs. 16% metro). Figure 2 displays the number of regulated slots by type of facility.

Figure 2

Type of Care	Young Children 0-5 Slots	
Centers	49,292	73%
Large Home-Based	10,259	15%
Small Home-Based	8,430	12%
Total All Types	67,981	100%

Data on capacity of publicly funded facilities by age group came from multiple sources. The Early Learning Division (ELD) administers several publicly-funded early learning programs: Oregon Head Start Prekindergarten (OPK), Early Head Start (EHS), Preschool Promise, and Baby Promise. ELD program managers provided lists of funded programs. Lists included facility identification information and numbers of children served or slots funded by each program. Oregon has a limited number of federally funded Head Start (HS) programs that did not receive either OPK funding and were thus not on the ELD lists. These included federal Head Start/Early Head Start, tribal HS, and Migrant and Seasonal HS programs. The Oregon Child Development Coalition (OCDC) manages the Migrant and Seasonal Head Start programs. Many programs blended funding and hence were on ELD lists and also were federally funded. Thus, in addition to using the ELD lists, researchers identified programs that had OCDC or Head Start in their

⁶ Between 2018 and 2020 there was a notable shift in the number of facilities that moved from regulated to license-exempt status. This can be attributed to an [Oregon Administrative Rule](#) change that stated as of October 2018 centers operated by a school district, political subdivision of this state, or a government agency were no longer required to be licensed by the Office of Child Care. However, since some of these facilities (n = 64) continue to receive public funding (e.g., Head Start, Preschool Promise, Oregon Prekindergarten), we include them into our definition of regulated supply in order to accurately represent the number of public slots in the state. These license-exempt and recorded programs with public slots are included as centers in Figure 1.

⁷ Metropolitan and nonmetropolitan counties were defined using the U.S. Office of Management and Budget Core-Based Statistical Area classification. Counties were classified as metropolitan if they include an urbanized area of 50,000 inhabitants or more, plus outlying counties with close economic or social ties to the central county. Nonmetropolitan counties include two groups: micropolitan and noncore. Micropolitan counties include at least one urban cluster of between 10,000 and 49,000 people, plus outlying counties. Noncore counties have no population cluster larger than 10,000.

facility name or were listed as receiving federal funds on the Head Start Early Childhood Learning and Knowledge Center website but had not appeared on an ELD list.

Public slots included in this report do not capture all public investments in child care. For instance, investments in the Employment-Related Day Care program (ERDC) are not included in this analysis of slots. Although ERDC, which is Oregon's child care subsidy program, helps families pay for child care, it typically does not create child care slots⁸. Families who receive ERDC rely on the regulated and legally-operating unregulated slots in their community to find a slot into which they enroll their child. A subsidy voucher helps them purchase care in one of those slots.

In addition, the number of publicly funded slots is likely underestimated. Local entities such as school districts or counties sometimes use their own public funds to deliver child care services, but that information was not in the available data and so those slots could have been missed. Head Start Child Care Partnerships use federal dollars to fund child care slots within community facilities, but those community facilities may not have been identified in the dataset. Also, families receiving Relief Nursery services often participate in a publicly funded early learning program, but a reliable number of those who participated in an early learning program was not available.

Getting to precise values for facility capacity provided challenges. The ES dataset included counts of desired capacity, that is the number of slots that could be filled at a given time. Most programs were full day, so the desired capacity represented the number of children the program hoped to serve at any one given time. But part-day programs often seek to fill that capacity more than once in a day, e.g., in the morning and afternoon. In those cases, the desired capacity reported in the ES dataset would be smaller than the number of children served. In some cases, the ELD lists included values for the number of children served. The ES dataset noted if facilities were full or part-day. Thus, by manually matching data from the ES dataset with that from the ELD lists, researchers were able to develop estimates for child care slots.

Researchers included counts aligned with their stated desired capacity only if the program offered a facility-based early learning program. In a few instances, ELD lists included numbers of children served with home visiting rather than in a center or home-based early learning program. When ELD lists included larger values of numbers served than the desired capacity values in the ES dataset, researchers checked to see if the program offered a home visiting program.

Population estimates from the Population Research Center at Portland State University were used to calculate the percent of children who had potential access to a slot. Estimates were from the 2019 Annual Population Report Tables, released April 15, 2020. In line with national practice, child care desert estimations used child population estimates by age group. Attempting to estimate the number who *need* child care would be out of line with national efforts and would be likely to introduce error as there are no reliable estimates of child care need. The population estimates can be thought about as the total *potential* demand for care.

⁸ The Oregon child care subsidy program has a small Contracted Slots program that contracts with providers. That program primarily funds Head Start programs to extend hours of services for eligible employed parents. This transforms part-day Head Start funded slots into full-day slots.

Findings

In examining the adequacy of the supply of child care and early education for young children in Oregon, we identified child care deserts and looked for association of deserts with public funding. We asked two main questions:

1. How adequate is Oregon's child care supply for children ages five and under? Specifically, how many counties are child care deserts? How does the supply of preschool-age care compare with that for infants and toddlers? How has this changed since 2018?
2. What percentage of child care slots are publicly funded? Does the percentage vary by age group served? Has public investment changed since 2018?

For each question, we also assess how supply varies by child age (i.e., infant/toddlers compared to preschoolers). Below we summarize the answers to each question while also displaying the information in maps and tables.

How adequate is Oregon's child care supply for children ages five and under? Specifically, how many counties are child care deserts? A county is a child care desert if there are more than three children for every regulated child care slot. Another way of representing the desert definition is to show the percentage of children in the county with potential access to a slot. Having a slot for fewer than 33% of the county's children is the same as having more than three children for every slot. Using the second definition facilitates county comparisons.

Statewide, 23% of Oregon's children age five and under have potential access to a regulated child care slot (14% of infants and toddlers and 32% of preschool-age children). This equates to roughly seven infants and toddlers for every infant/toddler slot and three preschool-age children for every preschool-age child care slot.

As seen in Figure 3 and [Map 1](#), all Oregon counties are child care deserts for infants and toddlers and 25 of the 36 (69%) counties are deserts for preschool-age children⁹. In addition, for infants and toddlers over half of Oregon's counties are extreme deserts, where there is, at most, one slot for every 10 children. See [Table 1](#) on page 16 to view the percentage of potential access to child care in each county.

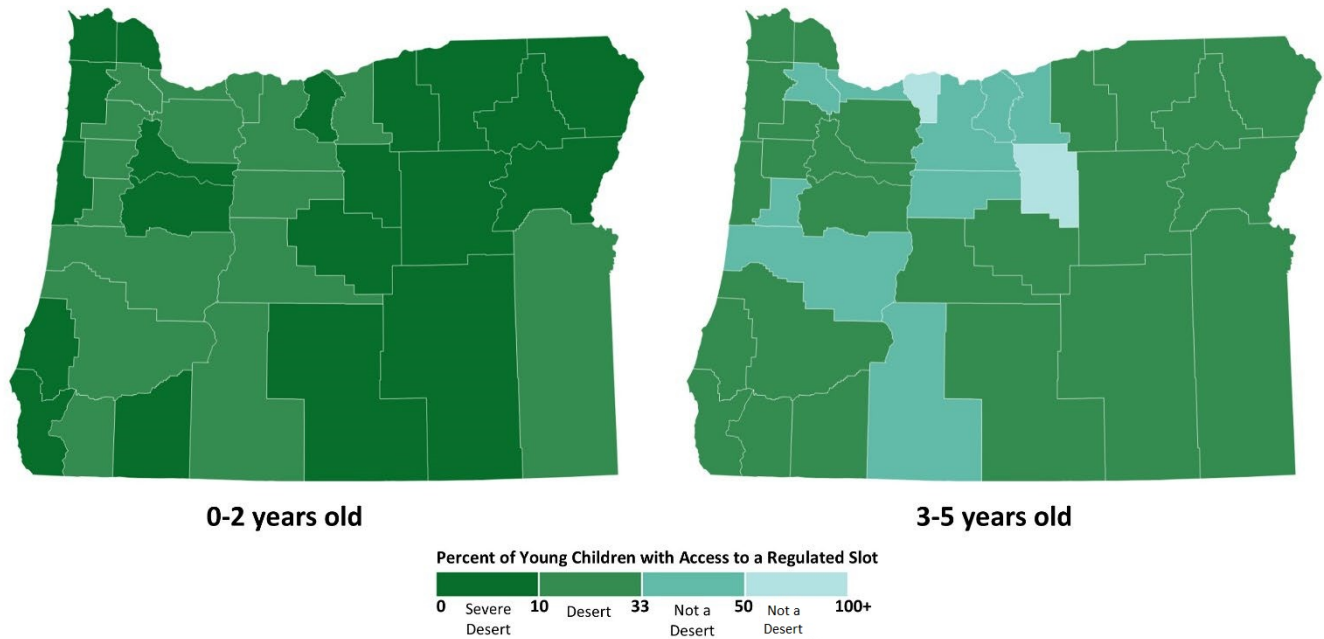
Figure 3

Percentage of Counties Ranked by Desert Status

Percent Access to a Slot	0-2 years		3-5 years		0-5 years	
	N	%	N	%	N	%
Severe Desert (0 - 10%)	20	56%	0	0%	2	6%
Desert (10 - 33%)	16	44%	25	69%	31	86%
Not a Desert (34 - 50%)	0	0%	9	25%	3	8%
Not a Desert (>50%)	0	0%	2	6%	0	0%
Total	36		36		36	
Desert	36	100%	25	69%	33	92%
Non-Desert	0	0%	11	31%	3	8%

⁹ The following counties are not child care deserts for preschool-age children: Benton, Gilliam, Hood River, Jefferson, Klamath, Lane, Multnomah, Sherman, Wasco, Washington, and Wheeler.

Map 1: Percent of Young Children with Potential Access to a Regulated Child Care Slot by Age Group



For larger view of map, see page 15.

How has the adequacy of Oregon’s child care supply for children ages five and under changed from 2018 to early 2020? Compared to 2018, the total regulated supply for young children increased by an overall 588 slots in 2020 (infant/toddler slots increased by 782, preschool slots decreased by 194¹⁰). The estimated number of children in Oregon ages five and under changed from 2018, seeing a decline of about 13,000 children ages 0-5¹¹. Despite an increase in the overall number of slots for children 0-5 and decrease in child population, only a few counties had shifts in their desert status. For infants and toddlers, all counties were child care deserts in both 2018 and 2020. For preschool age children, three counties (Gilliam, Lane, Washington) moved from being child care deserts in 2018 to not being deserts in 2020, however, the percent of children with potential access in 2020 (34-36%) is just above the desert cutoff.

There were also shifts in the severity of desert status for a few counties. For infants and toddlers, three counties (Morrow, Sherman, Umatilla) became more severe deserts in 2020, moving from 10-33% of children with potential access to less than 10% of children with potential access. Five counties (Douglas, Klamath, Malheur, Polk, Yamhill) became less severe deserts moving from 0-10% of children with access to 10-33% of children with access. For preschool age children, one county (Lake) became a less severe desert moving from 0-10% of children with access to 10-33% of children with access.

¹⁰ The loss of slots equates to a 0% change from 2018 (47,177 in 2018 to 46,983 in 2020). The decline does not appear to be concentrated to a single region or follow an identifiable pattern.

¹¹ Child population estimates in both 2018 and 2020 come from Portland State University Population Research Center.

It is important to note that not being a child care desert does not necessarily mean that the supply is sufficient for all families that need care, as approximately two-thirds of Oregon children five and under have two employed or a single employed parent (Oregon Child Care Research Partnership, 2018). Nor does not being a desert mean that quality and affordability are not issues that shape a family's ability to use the care available.

What percentage of child care slots are publicly funded? For this analysis, publicly funded slots are those slots funded by Oregon Head Start Prekindergarten, Early Head Start, Preschool Promise, Baby Promise, Federal and Tribal Head Start, and Federal Migrant and Seasonal Head Start managed by the Oregon Child Development Coalition. These slots are typically available only to children from very low-income families.

Overall, 19% of regulated slots for children ages five and under in Oregon are publicly funded, with the percentage of publicly funded slots varying substantially by age group. Of slots for infants and toddlers, only 8% are publicly funded, whereas 24% of slots for preschool-age children are publicly funded. See [Table 2](#) on page 17 for the number and percent of publicly funded slots by county.

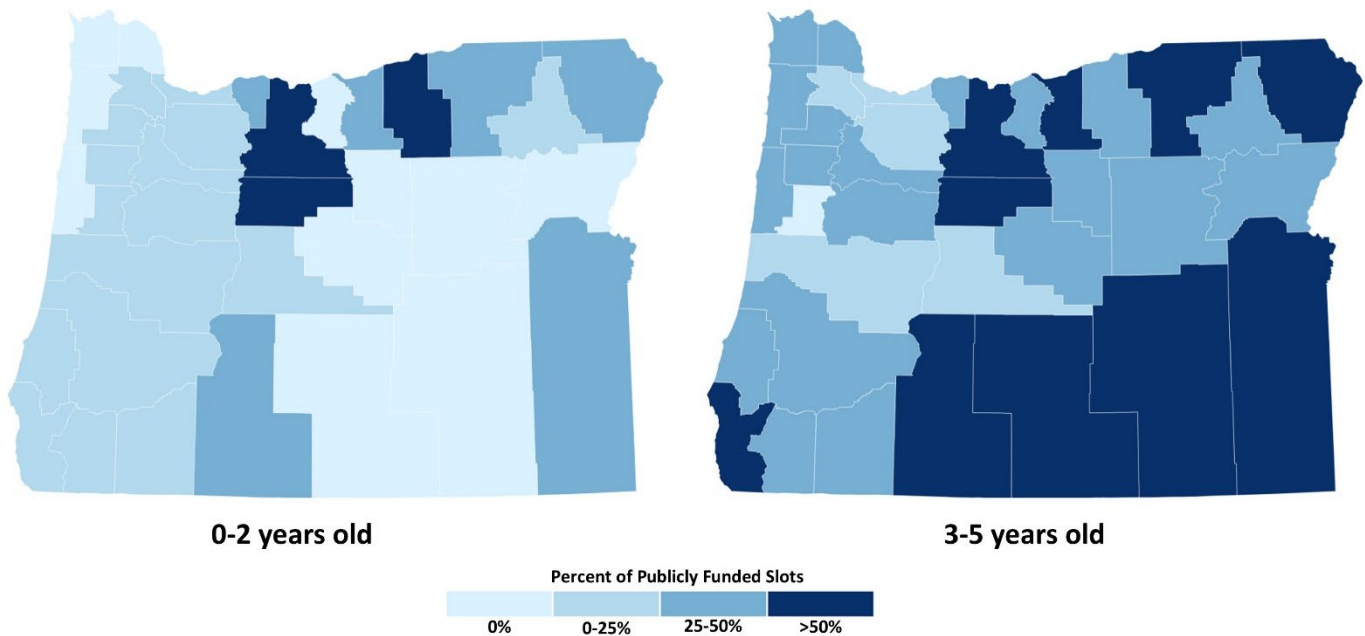
As can be seen in Figure 4 and [Map 2](#), the percentage of publicly funded slots varies across Oregon counties. Although 69% of counties have more than 25% of their 0-5 year old slots publicly funded, this varies greatly by age group. Only a quarter of Oregon counties (25%) have more than 25% publicly funded slots for infants and toddlers, whereas over four-fifths of counties (83%) have more than 25% publicly funded slots for preschool-age children. Eleven counties (31%) have no public funding for infants and toddlers, whereas all counties have public funding for preschoolers. Likewise, only three counties (8%) have greater than 50% of their infant/toddler slots from public funding, compared to 10 counties (28%) for preschool-age children. It is important to note that a higher percentage of publicly funded slots does not equate to more public funding. Rather, it means that a higher percentage of the total supply in the county is publicly funded.

Figure 4

Percentage of Counties Ranked by Percent of Publicly Funded Slots

Percent Public Slots	0-2 years		3-5 years		0-5 years	
	N	%	N	%	N	%
0%	11	31%	0	0%	0	0%
0 - 25%	16	44%	6	17%	11	31%
25 - 50%	6	17%	20	56%	17	47%
Greater than 50%	3	8%	10	28%	8	22%
Total	36		36		36	

Map 2: Percent of Regulated Child Care Slots that are Publicly Funded by Age Group



For larger view of map, see page 16.

It is also important to note that non-metropolitan counties have a higher percentage of public slots than metropolitan counties¹². Overall, 44% of slots for young children (0-5 years) in non-metropolitan counties are publicly funded, compared to 15% of slots in metropolitan counties. Although this remains the case when viewed by age groups, the percentage of publicly funded slots is a much smaller proportion of the supply for infants and toddlers (5% in metro, 31% in non-metro) than for preschool-age children (20% for metro, 49% for non-metro).

Publicly funded slots play an important role in supply adequacy. Examining the 11 counties that are not preschool child care deserts, eight of the eleven would become deserts without publicly funded slots¹³. Public slots make up 12% to 80% of preschool slots in these counties. Only Benton, Hood River, and Wheeler counties would continue to not be deserts without publicly funded slots.

How has the percentage of publicly funded child care slots changed from 2018 to 2020?

Between 2018 and 2020, increased state funding led to growth in the number of contracted slots offered by Oregon Prekindergarten and Preschool Promise, as well as created a new contracted slot program, Baby Promise, that contracts with providers for infant and toddler supply slots. Between 2018 and 2020, the total number of public slots throughout the state increased by 817 slots (353 infant/toddler slots, 464 preschool slots).

¹² Metropolitan and nonmetropolitan counties were defined using the U.S. Office of Management and Budget Core-Based Statistical Area classification, see footnote 7.

¹³ Counties that would become deserts without publicly funded slots include: Gilliam, Jefferson, Klamath, Lane, Multnomah, Sherman, Wasco, and Washington. Only Benton, Hood River, and Wheeler continue to not be deserts if publicly funded slots were not included.

In 2020, five counties had public slots for infants and toddlers when previously they did not have any publicly funded slots for this age group in 2018 (Coos, Curry, Deschutes, Douglas, Yamhill). Therefore, the total counties without any infant/toddler public slots was down to 11 in 2020, compared to 16 counties in 2018. In addition, nine counties increased the overall number of infant/toddler publicly funded slots compared to 2018, with four counties nearly doubling the number of public slots (Linn, Malheur, Marion, Wasco). Six counties decreased the overall number of public slots for infants and toddlers, with most ranging from a 17-32% decrease in their total publicly funded infant/toddler slots.

For preschool public slots, 25 counties increased the overall number of public slots, ranging from a 4-58% increase from 2018 public slots and one county doubling their public slots (Lake). Eight counties decreased the overall number of public preschool slots, with most ranging from a 3-8% decrease, with the exception of one county that experienced a 44% decrease in preschool public slots (Wheeler).

Discussion

Most Oregon families with a preschool-age child continue to live in a child care desert. All Oregon families with an infant or toddler live in a child care desert. Having an inadequate supply is not a new problem in Oregon.

Although there was a slight increase in the child care supply between 2018 and 2020 for young children 0-5, Oregon continues to have less regulated supply than it did 20 years ago for children ages 0-13. The decline in slots in small home-based care settings is associated with a decline in the total supply of regulated care. The decline in small family (registered) slots had begun prior to 1999 and the number of slots has continuously declined since that time. The number of slots available in centers and large family (certified) child care homes continues to increase, but has not made up for the long-term decline in small home-based slots. Currently, there is great concern about the negative impact the COVID-19 pandemic is having on the child care system across the state. This report provides a picture of where Oregon's supply was in early 2020 (pre-pandemic¹⁴) and can be a useful tool in which to measure recovery upon.

Two characteristics of child care supply provide insight into the adequacy of the supply, age group served and role of public funding. First, in terms of age-groups served, every Oregon county is a child care desert for infants and toddlers. Providers struggle to provide infant/toddler care, in part due to the high staffing levels needed to meet safety and developmental needs of very young children. Public funding has been primarily directed to preschool due to its proximity to kindergarten entrance. Yet the early years are critical to development, and many argue that waiting until preschool for public investment is not an effective way to support kindergarten readiness and family well-being.

¹⁴In March 2020, Oregon's [Executive Order 20-12 \(Stay Home, Save Lives\)](#) ordered Oregonians to stay at home, closed specific businesses, required social distancing measures, and imposed requirements for outdoor areas and child care facilities due to public health threat of COVID-19.

In recognition of the need for infant and toddler slots, the Baby Promise pilot program was created by the Early Learning Division in 2019 and has funded 104 slots in communities across the state as of early 2020. Although we see a modest (4%) increase in the number of regulated infant/toddler slots between 2018-2020, all of Oregon's counties continue to be deserts, and many of them are extreme deserts, for this age group. Thus, more investment and creative problem solving is needed to address the inadequacy of infant/toddler child care across all Oregon counties. It is important to note that the supply is largely inadequate for preschool-age children as well; 25 of 36 counties are deserts for preschool-age children. It is just that the supply is the least adequate for infants and toddlers, with only one slot for every seven infant/toddlers in Oregon.

Second, the percentage of slots that are publicly funded also plays an important role in shaping child care supply. The total supply in any county is made up of both publicly funded and non-publicly funded (market) slots. A larger market funded supply of child care is associated with larger populations and higher levels of household income and maternal education. Public funding is typically directed to areas where conditions for market care are weak. These targeted areas are in metropolitan and nonmetropolitan counties, but they make up a greater percentage of the slots in nonmetropolitan counties where the conditions to support market care are especially weak and thus the number of market slots is small.

When looking at the ten counties that are not child care deserts for preschool-age children, there is a substantial difference in the percentage of slots that are publicly funded by metropolitan status. In general, publicly funded slots make up a larger percentage of total supply in nonmetropolitan than metropolitan counties. In the six non-metropolitan counties that are not deserts, 25% or more of their slots are publicly funded. In the four metropolitan counties that are not deserts, less than 25% of their slots are publicly funded. Child care markets are stronger in metropolitan counties and thus the total number of slots is larger, and the percentage of publicly funded slots is smaller.

This study focuses on supply of child care and education; that is, across Oregon counties how many regulated slots does Oregon have in relationship to the number of children in an age group. Supply is a measure of how much child care is available in a community that families in that community could potentially access. As important as availability is, it is only one of a set of interrelated child care characteristics that are critical to making child care work for children and families. Affordability and quality are also important factors of accessibility. Child care slots may be available but not be accessible for many reasons, such as parents may not be able to afford the price, services may not be offered at times that align with parents' schedules, or the available care may not meet children's safety, developmental, or cultural needs. Having an adequate supply is not enough. For the child care system to effectively and equitably serve families, parents need child care to be available in locations and hours that work for them, affordable, and high quality so it meets their children's and families' needs.

Limitations

A limitation of this study is the geographical unit used. County was used because data were available on both supply and population for that geographical unit, and this also aligned with the 2018 Report. But as almost 30 years of market price surveys has demonstrated, a county typically contains multiple child care markets (a market is defined as a geographic area that includes both those who seek and those who provide care)¹⁵. Multiple child care communities typically exist within a county. Future studies should explore use of clusters of either zip codes or census tracts so as to better approximate child care communities.

In addition, the number of publicly funded slots is likely underestimated. Although the number of publicly funded slots not identified in the study is relatively small, it would be important that future studies include efforts to identify as many publicly funded slots as possible.

It is also worth noting that number of slots does not equal the number of children served. Some programs fill a slot with more than one child, as is the case of part-time or part-day enrollments. Available data capture the number of slots a program hopes to fill at any given moment, not the total number of children they hope to reach, or the number they actually serve. Thus, it is important to recognize that these findings address availability of *slots* and may not reflect the total number of children who can be *served* in Oregon's regulated child care and early education programs.

Finally, this report focuses on regulated care that is licensed by Oregon's Office of Child Care (OCC) within the Early Learning Division (ELD). Between 2018 and 2020 there was a notable shift in the number of facilities that moved from regulated to license-exempt status. This change can be attributed to a [2018 Rule change](#), which allows facilities run by other public agencies (e.g., K-12 schools) to be license-exempt with OCC. However, many of these license-exempt facilities continue to receive public funding that is administered or tracked by ELD (e.g., Preschool Promise, Oregon Prekindergarten). Thus, distinct from the 2018 report, we added exempt facilities with public slots into our definition of regulated supply. Future work will benefit from additional exploration into the implications of how child care supply is defined.

Study Implications and Next Steps

The majority of Oregon counties are child care deserts for preschool-age children as well as for infants and toddlers, which highlights how child care supply (i.e., child care desert status severity) varies by geography. These findings confirm parents' reports of supply inadequacies for young children and are consistent with those of prior studies both in Oregon and nationally. The study clarifies that issues of supply and public funding continue to be greater for infant/toddler than for preschool-age child care supply.

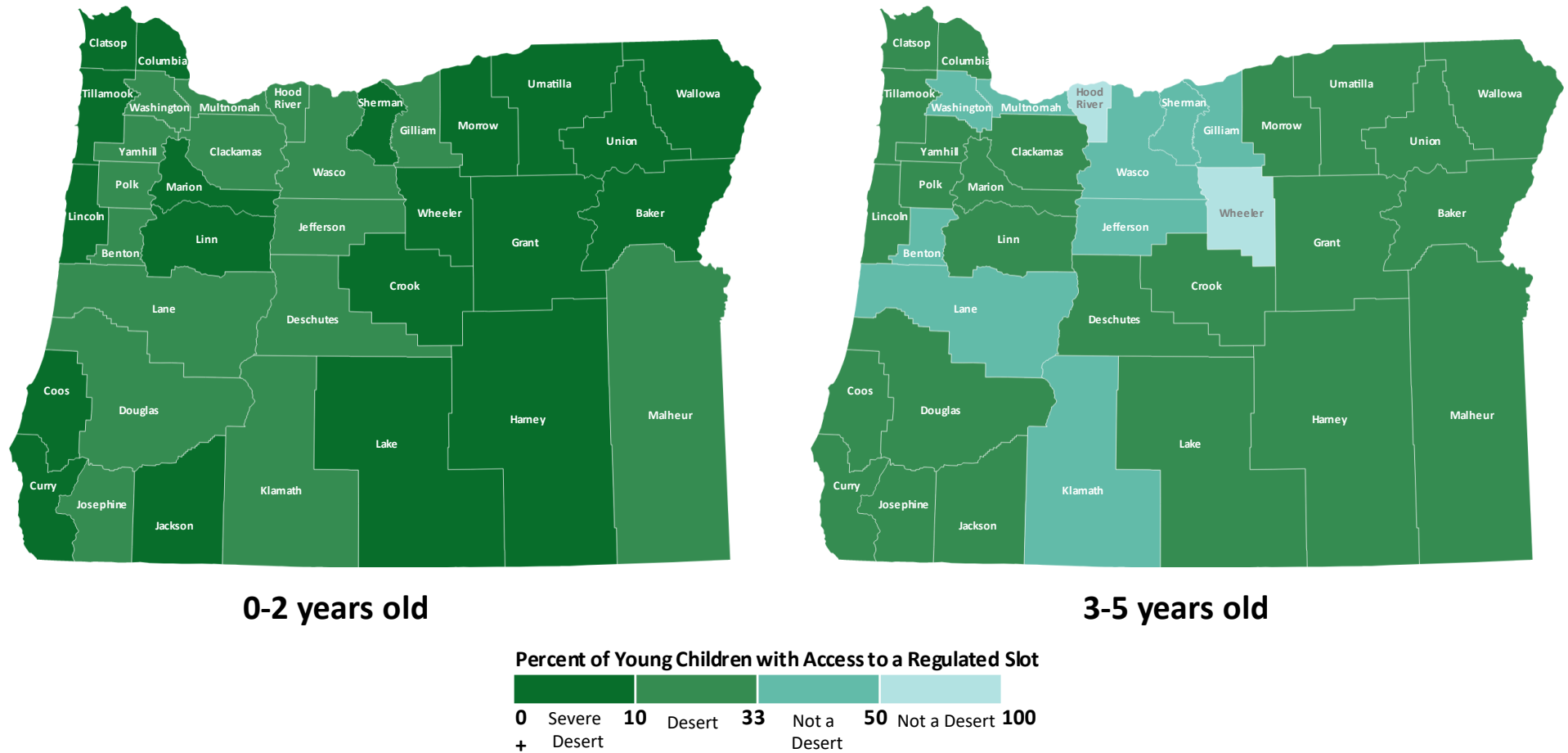
¹⁵ Grobe, D., Weber, R. B., Davis, E. E., Kreader, J. L., & Pratt, C. C. (2008). [Study of market prices: Validating child care market rate surveys](#). Corvallis, OR: Oregon Child Care Research Partnership, Oregon State University.

Systemic inequities in early childhood education and care have existed for a long time. These inequities have resulted in high quality, affordable child care being less accessible to families in currently and/or historically underrepresented or underserved communities. The COVID-19 pandemic has disrupted child care availability in Oregon as well as highlighted and exacerbated systemic inequities in the early care and education system. For example, recent research revealed clear disparities in how the COVID-19 pandemic has impacted child care for Black, Indigenous, and People of Color (BIPOC) families in Oregon¹⁶. In a survey and a series of listening sessions, BIPOC Oregon families reported higher rates of disrupted child care, voiced greater concern about exposure to COVID-19 when returning to in-person child care, and expressed more desire for culturally specific and culturally responsive child care options compared to all families who participated in this research.

Leaders in Oregon and across the United States are working on solutions to stabilize and rebuild early childhood education and care – a fragile, inequitable system that was already facing a supply shortage, with some communities living in more severe child care deserts than others. This report provides a picture of Oregon’s child care supply as of early 2020. The findings can be used as a baseline of supply before the COVID-19 pandemic, against which Oregon can measure efforts to stabilize and rebuild supply in the coming years. Continued work to understand how supply and demand realities vary across different groups of families and different geographical regions of the state will be critical to informing and evaluating focused supply building efforts that strive to effectively and equitably meet the needs and preferences of *all* of Oregon’s children and families.

¹⁶ Pears, K.C., Miao, A.J., Green, B.L., Lauzus, N., Patterson, L. B., Scheidt, D., & Tremaine, E. (2021). Oregon Preschool Development Grant Birth to Age 5 Strengths and Needs Assessment: [2020 Statewide Household Survey Results](#). Report submitted to the Oregon Early Learning Division and Early Learning Council, March 2021.

Map 1: Percent of Young Children with Potential Access to a Regulated Child Care Slot by Age Group

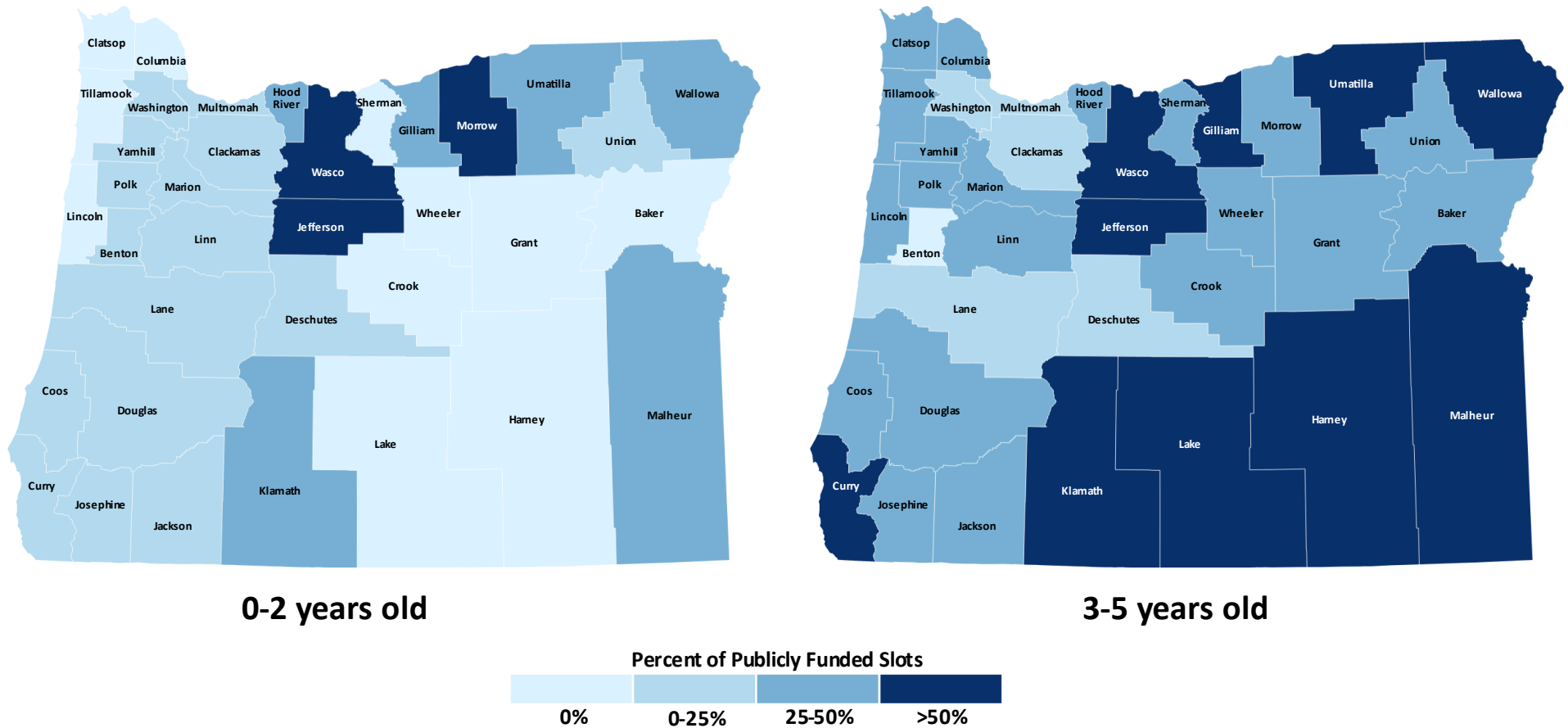


0-2 year olds includes children birth through the end of age 2. 3-5 year olds includes children 3 through the end of age 5.

Regulated child care slots includes slots in Certified Centers, Certified Family homes, Registered Family homes and Exempt programs that have public slots.

Data Information: Potential access to child care is calculated by taking the number of regulated child care slots for young children as of March 2020 (pre-COVID) (Estimated Supply of Child Care in Oregon, Oregon Child Care Research Partnership, Oregon State University) and dividing it by the population of children in the community who fall in the age group (2019 Annual Population Report Tables, Portland State University Population Research Center).

Map 2: Percent of Regulated Child Care Slots that are Publicly Funded by Age Group



0-2 year olds includes children birth through the end of age 2. 3-5 year olds includes children 3 through the end of age 5.

Regulated child care slots include slots in Certified Centers, Certified Family homes, Registered Family homes and Exempt programs that have public slots.

Data Information: Public slots for ages 0-5 include Oregon Head Start Prekindergarten, Early Head Start, Preschool Promise, Baby Promise, Federal and Tribal Head Start, and Federal Migrant and Seasonal Head Start managed by the Oregon Child Development Coalition. Percentage of slots that are publicly funded is calculated by dividing the number of public slots by the total number of regulated slots as of March 2020 (pre-COVID) (Estimated Supply of Child Care in Oregon, Oregon Child Care Research Partnership, Oregon State University).

**Table 1. Percent of Children in County with Potential Access to a Regulated Slot*
By Age Group**

A county is considered a child care desert if fewer than 33% of the county's children have access to a slot.

County	0-2 year olds	3-5 year olds	Total 0-5 year olds
Baker	5%	20%	12%
Benton	21%	45%	33%
Clackamas	15%	30%	23%
Clatsop	7%	28%	17%
Columbia	10%	25%	18%
Coos	9%	29%	19%
Crook	6%	25%	15%
Curry	7%	22%	14%
Deschutes	12%	33%	22%
Douglas	11%	27%	19%
Gilliam	21%	36%	28%
Grant	2%	26%	14%
Harney	3%	17%	10%
Hood River	18%	53%	36%
Jackson	9%	30%	19%
Jefferson	18%	44%	31%
Josephine	14%	27%	20%
Klamath	11%	42%	26%
Lake	0%	21%	10%
Lane	14%	35%	25%
Lincoln	4%	29%	16%
Linn	7%	19%	13%
Malheur	14%	31%	23%
Marion	10%	24%	17%
Morrow	9%	27%	18%
Multnomah	20%	42%	30%
Polk	11%	20%	15%
Sherman	6%	42%	23%
Tillamook	4%	24%	13%
Umatilla	9%	27%	18%
Union	8%	25%	16%
Wallowa	9%	27%	17%
Wasco	25%	43%	34%
Washington	19%	34%	27%
Wheeler	9%	75%	40%
Yamhill	12%	23%	18%
Oregon	14%	32%	23%

*Regulated includes Certified Centers, Certified Family, Registered Family Providers, and Exempt Providers who have public slots.

*0-2 includes children birth through the end of age 2; 3-5 includes children age 3 through the end of age 5.

Data sources: Access to child care is calculated by taking the Estimated Supply of Child Care in Oregon as of March 2020 (pre-COVID) (Analysis by Oregon Child Care Research Partnership, Oregon State University using data collected by the R&R system) and dividing it by the population of children in the county who fall in the age group (2019 Annual Population Report Tables, Portland State University Population Research Center)

**Table 2. Number and Percent of Public Slots By Age Group
for Regulated Programs***

Public slots for ages five and under include Oregon Pre-kindergarten, Early Head Start, Federal and Tribal Head Start, Oregon Child Development Coalition, Preschool Promise, and Baby Promise.

County	0-2 year olds			3-5 year olds			Total 0-5 year olds		
	Total Slots	Public Slots	Percent Public	Total Slots	Public Slots	Percent Public	Total Slots	Public Slots	Percent Public
Baker	30	0	0%	102	46	45%	132	46	35%
Benton	434	8	2%	967	110	11%	1,401	118	8%
Clackamas	2,006	40	2%	4,000	553	14%	6,006	593	10%
Clatsop	87	0	0%	355	136	38%	442	136	31%
Columbia	167	0	0%	398	186	47%	565	186	33%
Coos	188	47	25%	586	281	48%	774	328	42%
Crook	37	0	0%	156	58	37%	193	58	30%
Curry	32	4	13%	104	55	53%	136	59	43%
Deschutes	822	27	3%	2,251	195	9%	3,073	222	7%
Douglas	377	22	6%	890	294	33%	1,267	316	25%
Gilliam	14	6	43%	21	14	67%	35	20	57%
Grant	4	0	0%	42	20	48%	46	20	43%
Harney	6	0	0%	39	30	77%	45	30	67%
Hood River	163	56	34%	495	149	30%	658	205	31%
Jackson	656	72	11%	2,214	726	33%	2,870	798	28%
Jefferson	167	88	53%	377	301	80%	544	389	72%
Josephine	347	32	9%	683	233	34%	1,030	265	26%
Klamath	248	64	26%	925	471	51%	1,173	535	46%
Lake	0	0	0%	40	40	100%	40	40	100%
Lane	1,458	8	1%	3,700	756	20%	5,158	764	15%
Lincoln	54	0	0%	391	155	40%	445	155	35%
Linn	333	16	5%	910	251	28%	1,243	267	21%
Malheur	188	90	48%	409	269	66%	597	359	60%
Marion	1,411	252	18%	3,585	982	27%	4,996	1,234	25%
Morrow	40	40	100%	127	60	47%	167	100	60%
Multnomah	5,601	295	5%	11,494	2,434	21%	17,095	2,729	16%
Polk	364	48	13%	633	267	42%	997	315	32%
Sherman	4	0	0%	24	12	50%	28	12	43%
Tillamook	34	0	0%	213	102	48%	247	102	41%
Umatilla	336	150	45%	941	586	62%	1,277	736	58%
Union	86	8	9%	263	80	30%	349	88	25%
Wallowa	25	8	32%	71	37	52%	96	45	47%
Wasco	270	160	59%	444	249	56%	714	409	57%
Washington	4,534	124	3%	8,183	972	12%	12,717	1,096	9%
Wheeler	4	0	0%	30	9	30%	34	9	26%
Yamhill	471	32	7%	920	260	28%	1,391	292	21%
Oregon	20,998	1,697	8%	46,983	11,379	24%	67,981	13,076	19%

*Regulated includes Certified Centers, Certified Family, Registered Family Providers, and Exempt Providers who have public slots.

Data sources: The percentage of slots that are publicly funded is calculated by dividing the number of public slots in the programs listed above by the total number of regulated slots (Estimated Supply of Child Care in Oregon as of March 2020 (pre-COVID); Analysis by Oregon Child Care Research Partnership, Oregon State University using data collected by the R&R system)

As of early 2020*, there is inadequate regulated child care supply across Oregon - especially for infants & toddlers



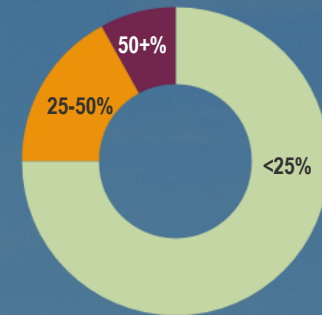
There are 7 infants & toddlers for a single child care slot in Oregon

A child care desert is a community with 3 or more children for a single child care slot.



All 36 Oregon counties are child care deserts for infants & toddlers

Public funding plays a major role in creating Oregon's child care supply – especially for preschoolers



3/4 of Oregon counties have fewer than 25% publicly funded regulated infant/toddler slots

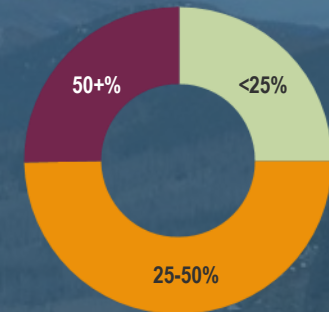


There are 3 preschool age children for a single child care slot in Oregon



All but 11 Oregon counties are child care deserts for preschool age children

Without publicly funded slots, 8 additional counties would be child care deserts.



Only 1/4 of Oregon counties have fewer than 25% publicly funded regulated preschool age slots

Definitions: **Infants & toddlers** are 0-2 year olds. **Preschool age children** are 3-5 year olds. **Regulated child care** includes certified centers, registered family homes, certified family homes, and exempt providers who have publicly funded slots. **Publicly funded slots** include Oregon Head Start Prekindergarten, Early Head Start, Preschool Promise, Federal and Tribal Head Start, and Federal Migrant and Seasonal Head Start managed by ODCD.

*As a baseline prior to the pandemic, this report describes the supply of child care as of March 1, 2020 (pre COVID).

Reference: Oregon's Child Care Deserts 2020 Mapping Supply by Age Group and Percentage of Publicly Funded Slot, Oregon Child Care Research Partnership, Oregon State University.

Full report can be found at https://health.oregonstate.edu/early_learners/supply

For more information contact Oregon Child Care Research Partnership at oregonccrp@oregonstate.edu