

# Assessing Child Care Access:



## Measuring Supply, Demand, Quality, and Shortages in the District of Columbia

### EXECUTIVE SUMMARY



Research and Analysis Conducted  
by Reinvestment Fund

Commissioned by the  
Bainum Family Foundation

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Child care is a critical resource for children and families. Quality environments and experiences help young children reach their fullest potential. A large and growing body of research suggests that quality child care improves the odds of children's future success in many different aspects of life, from academic achievement in grade school to higher earnings and better health outcomes later in life.<sup>1,2</sup> In addition, most young children grow up in homes with adults who need to work outside the home, and the economy needs the labor and taxes from these adults in order to thrive. For these families, finding safe and reliable child care options for their children can be a precondition to engaging in the workforce or furthering their education.

It is perhaps no surprise that access to quality child care options, which include early childhood education (ECE) programs and/or trusted caregivers, is one of the best investments society can make. Yet the child care sector is often under-resourced and in crisis. Many families find it difficult to access child care options they need, while many ECE-homes and ECE-centers struggle with low margins, rising operating costs, and persistent staffing shortages. Families cannot afford the true cost of quality child care, and early childhood educators cannot afford to work without compensation that is at least comparable to that of their peers in the K-12 education sector.

In 2018, the Bainum Family Foundation partnered with Reinvestment Fund to commission a report that studied the supply of and demand for child care, particularly ECE-homes and ECE-centers, across the District of Columbia. Our 2018 report found that the child care crisis made it challenging for families to access quality care and that the District's supply of seats for the youngest children in these licensed facilities was deeply

inadequate.<sup>3</sup> This impacted many District families, especially those living in communities that historically have been marginalized.

This report provides an update to our 2018 analysis and describes how supply, demand, quality, and shortages have changed over the past five years. The report describes the families with young children searching for child care and the characteristics of the ECE programs that serve them. As before, our analysis seeks to capture the entire market for full-time child care serving young children from birth through age 4 in ECE-homes, ECE-centers, and ECE-schools.

This report also analyzes the populations most impacted by the under-resourced and frail child care sector and offers suggestions about how to prioritize investments in building new supply that can meet the needs of the District's most vulnerable residents in keeping with the goals of local stakeholders.

The total supply has declined by 7%, while the number of children who could use child care has declined by 14%, driven by population trends and less commuting by families into D.C.





# Clarifying Our Terms

There are many terms used to describe child care options. These terms can make it difficult to understand the sector, describe the gaps, and make a case for substantial investments. We use three terms to discuss and assess child care in this report.

**CHILD CARE** is the umbrella term we use to describe situations in which caregivers (often other than a child’s parents or immediate guardians) are responsible for the care and development of young children from birth to age 5.

**EARLY CHILDHOOD EDUCATION (ECE) PROGRAMS** are a specific child care option that focuses on supporting and documenting child and program outcomes, typically outside the child’s home. ECE programs can be conducted in different settings, which we will identify as ECE-home, ECE-center, and ECE-school (to include both public and private schools) programs. ECE programs’ aims go far beyond keeping children safe while the adults in their families work or attend school. They intentionally support the cognitive, physical, social, and emotional development of young children through learning facilitated by early childhood educators with industry-recognized credentials and postsecondary degrees.

**TRUSTED CAREGIVER** is a specific child care option that focuses on supporting the child under the primary direction of the family. Trusted caregivers are sometimes family members or seen as an extension of the family (e.g., a nanny or an au pair). Trusted caregivers typically do not operate under guidelines from professional associations and government licensing agencies. Some families may use a combination of ECE programs and trusted caregivers to support the development of their children.

## CHILD CARE LANDSCAPE IN D.C.

### Early Childhood Education (ECE) Programs

- ECE-Homes\*
- ECE-Centers\*
- ECE-Schools (Public and Private)

*\* OSSE-licensed facilities*

### Trusted Caregivers\*\*

- Family Members
- Community Members
- Co-Ops
- Nannies
- Au Pairs

*\*\* Not a focus of this report*



With additional investments — targeted where the need is greatest — D.C. could strengthen its position to benefit children, families, and ECE professionals across the District, while also serving as inspiration for the nation.

# Key Findings and Takeaways

The 2023 analysis identified several important findings and trends impacting access to quality ECE in D.C.:

- **The District experienced a decline in both supply and demand.** Our estimates suggest that the District’s supply of ECE programs is smaller than it was five years ago. The total supply has declined by 7%, while the number of children who could use child care has declined by 14%, driven by population trends and less commuting by families into D.C.

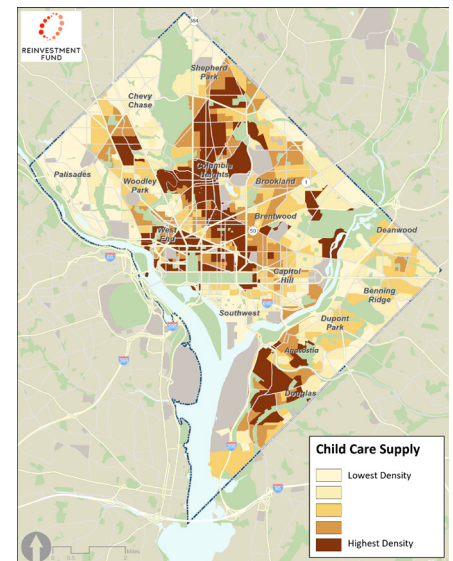
**Figure 2: Overall Demand for Child Care Seats Has Declined 14% Since 2018**

*Demand Components*

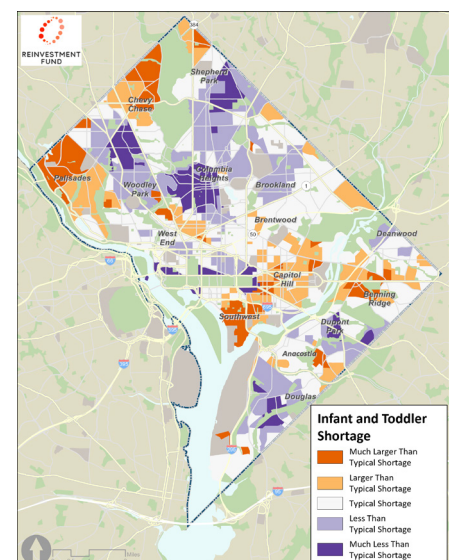
	2018	2023	% Change
Population Estimate	43,134	40,286	-6%
Commuter Estimate	14,953	9,416	-37%
<b>Estimated Demand</b>	<b>58,087</b>	<b>49,702</b>	<b>-14%</b>

- **In the aggregate, the shortages of ECE programs are smaller today than they were in 2018, but challenges remain.** Our previous report found that in 2018, the District had enough capacity for only 65% of children under age 5. Today, we estimate the District has enough capacity to serve 71% of these children. While the overall trend is positive, important access gaps remain, particularly for quality child care, for economically disadvantaged families, and for children who need specialized services such as nontraditional hours and bilingual settings.
- **Despite improvements, infants and toddlers (ages 0-2) remain especially underserved.** Disaggregating the District’s supply by age shows that the shortage of ECE programs in the District is really a shortage of infant and toddler seats. Despite improvements since 2018, we estimate that there are enough seats for only 41% of the infants and toddlers in D.C., a 48% increase in seats since 2018.
- **Every ward in D.C. is experiencing shortages, but some are experiencing more than others.** By examining supply and demand at a precise geographic level, we can see that every one of D.C.’s eight wards has at least some areas with child care shortages. While the extent of these shortages varies, access to quality child care is a challenge for families across the District.

**Figure 1: Downtown, Columbia Heights, and Anacostia Have the Highest Share of ECE Programs**  
*Density of Total ECE Program Capacity in D.C.*



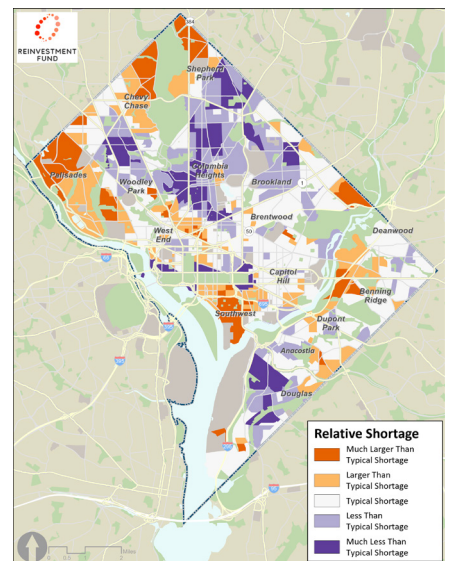
**Figure 3: Shortages of Infant and Toddler Care Exist Across Every Ward**  
*Relative Shortage for Children Ages 0-2*



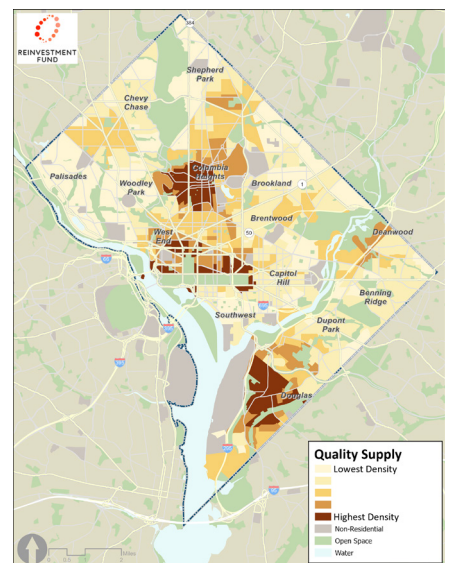


- Only about one-third of the District’s programs meet our definition of quality.** Working with local stakeholders, we identified three different markers of quality: earning “High-Quality” and “Quality” ratings from the “Capital Quality” rating system of the D.C. Office of the State Superintendent of Education (OSSE), participating in the federal Head Start or Early Head Start programs, or holding a national industry-recognized accreditation from the National Association for the Education of Young Children (NAEYC) or the National Association for Family Child Care (NAFCC). Programs meeting at least one of our criteria had enough capacity to serve just 10,800 children, only a quarter of the children under age 5 living in D.C. (It’s important to note that there is no consistent measurement or assessment of ECE quality in public or private schools. Also, some ECE programs may be more suitable and eligible for other quality indicators that were not defined in this report.)
- Remote work is driving fewer families to seek care near downtown commercial centers.** The share of employees working from home has grown substantially since 2018. While parents who work from home still need child care, where they look for care may change. With fewer workers commuting downtown for jobs every day of the week, we estimated a decline in the demand for care in D.C.’s downtown job centers and an increase in residential neighborhoods. Still, some demand for care near job centers will remain, particularly near employers in industries that require employees to work on-site (e.g., retail trade, health care, education, hospitality).
- Some child care usage data remains unknown.** This report did not assess the demand for or use of family, friends, neighbors, nannies, or au pairs as a child care alternative. These trusted (and often unlicensed) caregivers are an important part of the child care ecosystem, offering care that is often more convenient and flexible, more affordable, and culturally aligned with families’ needs. The extent to which families choose these options or are compelled to use them because other options are not available is unknown at this time.

**Figure 4: Shortages Affect Some Neighborhoods More Acutely**  
*Map of Relative Shortage in D.C.*



**Figure 5: Quality ECE-Homes and ECE-Centers Are Concentrated in Three Areas**  
*Licensed Capacity in ECE-Homes and ECE-Centers Meeting at Least One Quality Criteria*



Disaggregating the District’s supply by age shows that the shortage of ECE programs in the District is really a shortage of infant and toddler seats.



# Developing Investment and Intervention Strategies

This report's findings can support both public and private investors as they work to expand quality supply through grants, loans, and technical assistance designed to start or expand programs. Building a better child care system means ensuring families have equitable access to child care programs that are geographically accessible but also are affordable, offer a quality learning environment, and meet their specific needs.

As is the case in many cities, the investments required to eliminate every child care access gap are substantial, and the resources available are limited. Following are different characteristics that stakeholders could use to prioritize neighborhoods for future investments and interventions.

- Prioritize affordability and access for low- and moderate-income families
- Prioritize affordability and access where there are job clusters
- Prioritize racial equity
- Prioritize quality

While D.C. is a recognized leader nationally in providing access to affordable, quality child care, there is still work to do. With additional investments — targeted where the need is greatest — D.C. could strengthen its position to benefit children, families, and ECE professionals across the District, while also serving as inspiration for the nation.

As the first sentence of the 2022 Bainum Family Foundation-funded WeVision EarlyEd report stated, "Washington, D.C., has a chance to do what no other American jurisdiction has done: get child care right."

(For more information about the WeVision EarlyEd initiative, visit <https://wevisionearlyed.org/>.)

## Endnotes

<sup>1</sup> Heckman, J. J. Invest in "Early Childhood Development: Reduce Deficits, Strengthen the Economy." January 2020. Retrieved from The Heckman Equation: <https://heckmanequation.org/resource/invest-in-early-childhood-development-reduce-deficits-strengthen-the-economy/>.

<sup>2</sup> Leslie J. Calman, L. T.-W. (2005). Early Childhood Education for All: A Wise Investment. New York: Legal Momentum.

<sup>3</sup> "Early Learning Supply and Demand in the District of Columbia: Using Data to Identify Critical Gaps." Bainum Family Foundation, 2018. [https://bainumfdn.org/wp-content/uploads/2018/10/Bainum\\_EL-Supply-Demand-Report\\_FNL\\_Nov-2018.pdf](https://bainumfdn.org/wp-content/uploads/2018/10/Bainum_EL-Supply-Demand-Report_FNL_Nov-2018.pdf).



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Learn more about the 2023 research and download the full report at <https://ChildCareAccessDC.org>.

