



**KIDS FIRST**  
CITY OF ASPEN

# CHILD CARE NEEDS ASSESSMENT FINAL REPORT



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## ACKNOWLEDGEMENTS

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# BURLINGAME ANALYSIS AT A GLANCE



**Background:** While this report seeks to evaluate the full picture of child care needs for families in Pitkin County, Kids First and the City of Aspen are particularly interested in evaluating the need for a child care center at Burlingame Ranch. This report provides both general information to understand child care needs and specific information and recommendations to support decision-making on this proposed project.

The Burlingame Early Childhood Education Center, as currently envisioned, would be a 15,300-square-foot licensed center with three playgrounds. The center would have slots for 16 infants, 20 toddlers, and 58 preschoolers, requiring approximately 24 staff members. The cost estimate for the facility was about \$15 million in 2022.

## QUESTION: IS THERE A NEED FOR THE PROPOSED BURLINGAME CHILD CARE CENTER?

### OBSERVATIONS:

- There is a need for additional child care capacity for some age groups in Pitkin County and the Roaring Fork Valley more generally. Pitkin County has an unmet need for child care for infants and toddlers under age 2.5. Child care availability for preschoolers is more sufficient.
- Families have unmet needs for child care including:
  - Availability for infants and toddlers
  - Affordability
  - Hours of care that match their work schedules
  - Accessible locations near where they live or work
- Due to known constraints in the child care business model, creating new preschool slots in Pitkin County without additional support for existing providers may threaten their financial sustainability and destabilize the local child care landscape.

### CONCLUSIONS:

- The Burlingame child care center as currently envisioned has the potential to harm the existing child care infrastructure by contributing to an oversupply of preschool slots. The proposed model for the center should be reevaluated due to operational concerns and the potential impact on existing providers.
- Efforts to increase child care capacity with a new facility or other strategies should be aligned with the unmet needs of families.
- A new center will only benefit the community to the extent that existing providers are supported and the specific needs and preferences of families are addressed.

# PITKIN COUNTY CHILD CARE NEEDS ASSESSMENT EXECUTIVE SUMMARY

Child care is an integral piece of the fabric of a community. Most parents of young children rely on others to help care for their child during their earliest years, and families and children thrive when they can access the type of care they need and want, whether they choose a child care center, preschool, nanny, or family member to care for their children. Child care is also a vital underpinning for the local economy, supporting parents' ability to participate in the workforce, and ensuring employers have access to the labor force they need to operate successfully.

The City of Aspen has long demonstrated a strong commitment to helping families who live or work in Pitkin County access the care they need to remain and thrive in the community. Still, the City wrestles with questions plaguing many communities: Is there enough child care for families who need it? What will child care needs look like in the future? And how can we ensure the community's child care options truly meet families' needs and preferences for care?

These questions are of particular importance as the City weighs the creation of a new child care facility in the Burlingame Ranch neighborhood. Making significant investments in child care capacity requires a careful weighing of factors such as the current and future demand for care, the sustainability of existing providers, and the needs of families in the region.

There are several approaches to quantifying the need for child care, each with its own benefits and limitations. Unlike projecting housing needs, where it can be reasonably assumed that every family will need housing, the number of decision points families face when choosing whether to use child care—and what types of providers to use—makes estimating child care demand a complex undertaking. Commonly used methods of quantifying the need for care include comparing the population of young children in a community to the number of licensed child care slots, assessing the need for care by examining the share of children with parents in the workforce, and analyzing waitlist data from existing providers. Additional consideration of the varying needs and preferences of families regarding location, curriculum, teacher qualifications, hours of operation, provider language, and other factors are critical for understanding whether community child care needs are being met.

Estimating the need for child care in Pitkin County adds other layers of complexity. In a deeply interconnected region like the Roaring Fork Valley, families regularly cross county lines for child care or employment opportunities – meaning an analysis isolated to Pitkin County will not sufficiently capture the need for child care in the community. This needs assessment therefore considers the child care needs of families from Pitkin County, as well as neighboring Garfield and western Eagle counties, to provide a clearer picture of demand from across the region.

## PITKIN COUNTY CHILD CARE NEEDS ASSESSMENT EXECUTIVE SUMMARY

Drawing on data from a survey of families, focus groups with parents, an analysis of demographic and workforce data, and interviews with child care providers, employers, and community-based organizations, this report fulfills the following objectives:

- Provides an overview of families' current child care arrangements, preferences related to child care, and barriers they face to accessing care.
- Summarizes the existing supply of licensed child care in Pitkin County.
- Explores the factors that drive demand for child care in Pitkin County—both current demand and projected future demand.
- Summarizes this information to draw conclusions about the adequacy of child care supply and whether this supply will meet projected future needs.
- Outlines key considerations for the City of Aspen when deciding whether to invest in a new child care center in the Burlingame Ranch neighborhood.

By accomplishing these objectives, the assessment equips the City of Aspen and Kids First with comprehensive data that can inform decisions about the creation of new child care capacity in the community.



## PITKIN COUNTY CHILD CARE NEEDS ASSESSMENT EXECUTIVE SUMMARY

### KEY FINDINGS FROM THE NEEDS ASSESSMENT INCLUDE:

#### **Most families in the region use some form of non-parental child care.**

- The share of young children living in families where all parents in the family are working is very high in the Roaring Fork Valley, and most families rely on some form of child care. More than eight in 10 families in the Roaring Fork Valley reported in the family survey that they use some form of non-parental child care during a typical week.
- Families report using both licensed care (e.g., child care centers or preschools) as well as license-exempt or informal care (e.g., nannies or nanny shares, family members, friends, or neighbors). The most common source of care for families who report using child care is a child care center. Many families, however, report piecing together care from multiple sources in order to meet their needs. Use of license-exempt or informal care varied by race/ethnicity, with Hispanic or Latino families reporting using this type of care at higher rates than white families.

#### **Many parents who commute from surrounding areas would like to use child care in Pitkin County, creating additional demand that must be considered alongside demand from families who live in Pitkin County.**

- The ratio of young children who live in Pitkin County to the number of child care slots, a measure commonly used to assess whether a community is a licensed child care “desert,” is not as high in Pitkin County as in many other communities across the state. However, families who commute to Pitkin County for work create additional demand from outside the county, and this demand must be accounted for when assessing the need for child care.
- Among families who live in Garfield or Eagle County but commute to Pitkin County for work, approximately one-quarter of those who do not currently have child care in Pitkin County indicated they would prefer to use a Pitkin County provider.

#### **Families who do not currently use child care in Pitkin County perceive it as unaffordable.**

- When asked what would need to change for them to use child care in Pitkin County, commuting parents who want to use a Pitkin County child care provider were most likely to cite a need for a lower cost of care. Kids First offers financial aid to families who live or work in Pitkin County, and ensuring families across the region are aware of this resource could help more parents afford the care they need. Families would also benefit from increased financial aid support.

## PITKIN COUNTY CHILD CARE NEEDS ASSESSMENT EXECUTIVE SUMMARY

**Pitkin County has an unmet need for child care for infants and toddlers. Child care for preschoolers is more sufficient, and creating new preschool slots may threaten the sustainability of existing providers.**

- Considering population estimates and forecasts, family experiences shared during focus groups, licensed child care capacity data, and family survey data, Pitkin County likely has a shortage of child care slots for infants and toddlers (children under 2.5 years of age). Without additional capacity that meets families' needs, it is likely that this shortage may worsen in future years as the young child population in the Roaring Fork Valley is projected to grow through 2040.
- Care for preschool-aged children (ages 2.5 to 5 years old and not yet in kindergarten) is more widely available in the community, and families of preschoolers generally feel they have more options from which to choose. Many providers and some focus group participants expressed a concern that unfilled preschool slots are negatively impacting the finances of existing child care providers.
- Although the supply of preschool care comes close to meeting demand, availability of slots is only one component of child care access. It is important that the City of Aspen continue to consider how existing care options meet families' needs for care that aligns with their work schedules, preferences regarding curriculum and approach to education, and ability to afford care.

*“When I was desperately looking for infant child care, I had to become part-time at work, so my work suffered. ... We ended up miraculously finding three days a week [in another county]. And I was forced to travel 40 minutes one way for drop-off, 40 minutes back home to work, 40 minutes to pick up, and 40 minutes back home. In bad weather during the winter, I was on the road four to five hours per day. That is not healthy for my baby, it's not healthy for me, and it's just flat out not safe. Nearby, reliable daycare was what saved my life!”*

*- Family survey respondent*



## PITKIN COUNTY CHILD CARE NEEDS ASSESSMENT EXECUTIVE SUMMARY

**Efforts to increase child care capacity with a new facility or other strategies will only benefit the community to the extent that existing providers are supported and the specific needs and preferences of families are addressed.**

- Current providers are experiencing challenges with preschool enrollment, recruitment and retention of staff, and generating sufficient revenue to cover the full cost of care. Without careful consideration of how to mitigate these challenges, a new child care facility could exacerbate the issues.
- Families are experiencing challenges with the cost and operating hours of existing child care programs. Any future facilities and programs should seek to address these needs.

**The child care facility at Burlingame, as currently envisioned, should be reevaluated due to several operational concerns and the potential impact on existing providers.**

- The current vision for the Burlingame child care facility includes a significant (16%) increase in preschool capacity in Pitkin County, which has the potential to harm the financial and operational sustainability of both the Burlingame center and other area providers.
- However, families do have unmet child care needs, and a child care center in the Burlingame neighborhood presents a unique opportunity to support an increase in child care supply that meets specific unmet needs for care. Options for increasing the viability and utility of a potential new center include:
  - Changing the vision and operating model of the new center to target the specific needs of families in Pitkin County, such as care for children under 2.5 years old, expanded affordability for families, and extended hours/days.
  - Building a space that is flexible and can be modified to meet current needs and adapted to meet any changing needs in the future (i.e., building spaces that can be flexible to adapt to changing needs for different age groups based on square footage, bathroom placement, plumbing, etc.).
  - Utilizing the space and programming to help increase recruitment and retention of child care teachers (e.g., dedicated housing or training programs).
  - Revising funding policies to help all providers maintain financial viability when they have fluctuating enrollment (e.g., base pay or enhanced payments for infant and toddler slots).

## PITKIN COUNTY CHILD CARE NEEDS ASSESSMENT EXECUTIVE SUMMARY

For parents, deciding who will help care for their children during their earliest years of life is a deeply personal and important choice. Although this needs assessment provides rich data on the child care preferences and experiences of Roaring Fork Valley families, the complexity of decision-making around child care—and the role that broader social and economic trends play in the need for child care—makes true demand challenging to predict. Moving forward, it will be important for the City of Aspen to stay apprised of demographic and economic trends and adjust child care plans as needed. By pairing new, comprehensive data on families' needs and preferences with an analysis of demographic data on the region, this needs assessment provides a strong foundation from which the City can build as it continues its work to ensure every family who lives or works in Pitkin County has access to the child care they need.



# BACKGROUND

In Aspen, child care has been a public policy priority for many years, and the City has made significant strides toward helping more families access care. However, many families still struggle to find child care that meets their needs.

This report was commissioned by Kids First to assess the current and future child care needs within the Roaring Fork Valley to inform policy, planning, resource allocation, and potential developments. This report seeks to holistically evaluate the complex factors related to the supply and demand of child care to paint a clear picture of where there are strengths and gaps and help guide the City's decision-making about future efforts.

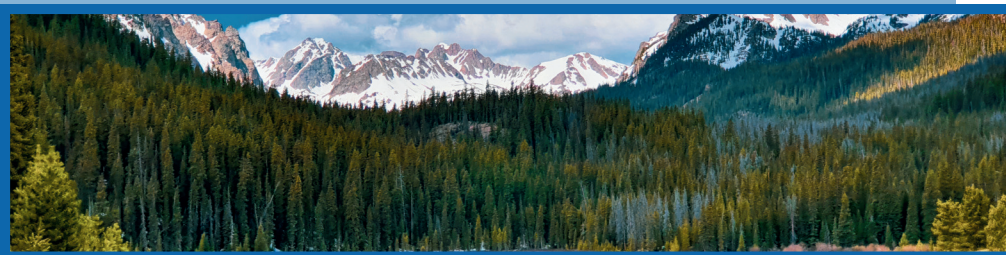
## **KIDS FIRST**

Kids First is an early childhood resource center and department of the City of Aspen. Created in 1990, Kids First receives a portion of a dedicated sales tax within the City to support child care. Kids First provides support across Pitkin County, including child care financial aid for parents, supportive funding for child care programs, quality incentives for child care staff, quality improvement coaching for child care programs, professional development for educators, early childhood mental health and nurse consultation for child care programs, and parenting workshops.

## **BURLINGAME CHILD CARE FACILITY**

While this report seeks to evaluate the full picture of child care needs for families in Pitkin County, Kids First and the City are particularly interested in evaluating the need for a child care facility at Burlingame Ranch. This report provides both general information to understand child care needs and specific information and recommendations to support decision-making on this proposed project.

Between 2000 and 2011, the City went through a series of approvals for the development of Burlingame Ranch. As a part of these processes, the City approved an allowance for one parcel (Parcel C) to be used for a child care center. In 2017, the City of Aspen purchased Burlingame Ranch with the intent to develop affordable housing.



## BACKGROUND

A design team was contracted by the City in 2022 and developed several design schemes for a child care center, which were then refined by a design advisory group. The design process included input from Kids First, as well as neighborhood and community members. A final preferred design for the child care facility was identified by City Council in late 2022 and included in a land use application, which was approved in May 2024.

The center, as currently envisioned, would be a 15,300-square-foot licensed center with three playgrounds. The center would have slots for 16 infants, 20 toddlers, and 58 preschoolers, requiring approximately 24 staff members. The cost estimate for the facility was about \$15 million in 2022.

Kids First has been building up a reserve fund in anticipation of contributing to fundraising for the development of a new center. However, before proceeding with fundraising for this project, Kids First requested a Community Child Care Needs Assessment to measure and forecast the need for additional child care slots in the community in general and to help evaluate the need for a new center at the Burlingame location.



# GOALS & OBJECTIVES OF THE ASSESSMENT

## **1. Understand current and future child care needs in Pitkin County.**

Kids First seeks to develop a holistic view of the child care needs of families who live or work in Pitkin County, including identifying gaps in child care services, understanding how community demographics are impacting child care needs, and gathering input from parents, providers, and other stakeholders to inform next steps. Specifically, this assessment:

- Examines the current supply and demand for child care services in Pitkin County.
- Gathers demographic and other population data to understand the needs of families who live and/or work in Pitkin County.
- Assesses child care availability against the needs and desires of families.
- Shares input on current and future child care needs from community members.

## **2. Evaluate the need for a child care center at Burlingame Ranch.**

Additionally, the City of Aspen and Kids First will use the information gathered to inform decisions about the development of a new child care center at Burlingame Ranch.

## **GEOGRAPHIC & DEMOGRAPHIC SCOPE OF THIS ASSESSMENT**

This needs assessment was designed to understand the child care needs of families with children from birth through 5 years old who live and/or work in Aspen and Pitkin County. Because of the unique interconnectedness and commuting patterns in the Roaring Fork Valley, data collection and analysis includes families in Pitkin, western Eagle, and Garfield counties. The report also includes analysis and perspectives of licensed child care providers operating in Pitkin County. The needs assessment also considers families' needs and preferences with regard to license-exempt family, friend, neighbor, and/or nanny providers. Community-serving organizations and large employers provided additional context through interviews.

## **METHODOLOGY OVERVIEW**

This needs assessment was conducted using mixed methods, including:

- Review of secondary data on demographics and commuting patterns for the region.
- A comprehensive survey that assessed the child care needs, preferences, and experiences of families (see Appendices A and B for a detailed overview of results);
- Focus groups with families of young children (see Appendix C).
- Interviews with licensed child care providers (see Appendix D).
- Interviews with leaders of community organizations (see Appendix E).
- Interviews with large employers (see Appendix F).

# CURRENT CHILD CARE CONTEXT

The family survey, focus groups, and interviews with providers yielded important information about the current child care arrangements of families in the region. More than eight in 10 families in the Aspen-to-Parachute region use child care, with licensed, center-based care being the most common option. However, many parents report they rely on license-exempt or informal arrangements (e.g., nannies, au pairs, family members or friends) as well, with use of informal care higher among Hispanic or Latino families, as well as families who live in Garfield County. Many families also combine types of care, piecing together care from multiple sources to meet their child care needs.

*“We have had to use three different child care providers within the week to piece together care so we can both work, which has significant stress on both child and family.”*

*- Family survey respondent*

Parents in Garfield and Eagle counties who responded to the family survey reported more difficulty finding care for their children, echoing themes heard in focus groups conducted with local parents. Families with infants and toddlers were also more likely than those with preschoolers to report that finding care for their child was very difficult.

Although finding care can be challenging, families who have care are generally satisfied with the care their child receives. Among those who were not satisfied with their care, cost and a mismatch between provider operating hours and families' work schedules were commonly reported sources of frustration.

*“Child care [until] 5:15 made a huge difference to us. Even when it was 5 pm, it was challenging. We couldn't use care that ends at 3 pm or we wouldn't be able to work.”*

*- Family survey respondent*

Finally, some children in the region are not regularly cared for by anyone other than a parent or guardian. The cost of care, parental preference to care for their children, and inability to find a slot that meets their needs were commonly reported reasons why families did not use any type of non-parental care. About two-thirds of families who did not currently use child care said they would like to use it if they could find an option that meets their needs.

*For more detailed information on the current child care arrangements and preferences among families in the region, please see Appendix B.*

## CONTEXT

### FAMILY AND EMPLOYER IMPACTS

Through a survey, focus groups, and interviews, parents shared many stories demonstrating how families are making it work when they are unable to find or afford the child care they need. Some shared that relatives relocated from far away to help provide care for young children. Others told stories about their concern for the health and safety of their children as they accept any care they can find, even when they are not comfortable with the care environment. Many participants shared their concern about the future of the community because they perceive that families are moving out of the area or choosing not to have children because they can't afford to live in the valley.

Employers shared that they offer significant flexibility to employees to accommodate their child care needs, but for those in critical frontline positions – service roles, patient care, or teaching, for example – flexibility is typically not an option. Employers also observe that their employees who are women seem to be more impacted by child care challenges than men. Employers consistently see that child care is a significant concern for potential and current employees, following cost of living and housing as primary barriers to working in the area.

Additionally, family survey respondents shared that their employment has been disrupted due to problems with child care. Approximately 37% of survey respondents reported that child care problems caused someone in their family to quit a job, not take a job, or greatly change their job in the past 12 months due to problems with child care. More than half reported that child care challenges had caused them to use vacation days, sick days or other paid leave, and one-third reported that they had to take unpaid leave. More than 40% reported cutting their work hours due to child care problems. Approximately 12% reported they had left a job due to child care challenges, and nearly 20% reported not looking for a job in order to care for children.



## CONTEXT

### WHAT FACTORS INFLUENCE THE DEMAND FOR CHILD CARE?

Understanding how demand for child care among families in the region compares to supply is a primary objective of this needs assessment. Assessing the demand for child care is more complex than comparing the number of licensed slots to the number of children in the community, although this information provides a basis for analysis. When making decisions about where their children will be cared for, each family considers factors such as alignment with their work schedules, preferences for in-home or center-based care, cost, and curriculum, among other criteria.

Projecting the need for child care becomes even more complex in a community like Pitkin County that is closely interconnected with communities throughout the Roaring Fork and Colorado River Valleys. Because Pitkin County is a major employment center in the region, parents who commute to work in Aspen from communities in Garfield and western Eagle County are also potential users of child care in Pitkin County. Data collected by Kids First from Pitkin County child care programs in April 2025 indicated that many families cross county lines for child care, with approximately 22% of children enrolled in licensed Pitkin County programs living outside of Pitkin County. The child care needs and preferences of families who commute into Aspen from other communities must be considered alongside those of families who reside in Pitkin County in order to obtain the full picture of demand for care.

The data on demand for child care included in this report are estimates derived from the best available data sources. Estimates are inherently imperfect, however, and demand is always subject to change if there are unanticipated developments related to housing supply, employment or commuting patterns, policy changes, or larger social and economic trends.

### KEY QUESTIONS

Understanding the demand for child care in Pitkin County requires answering fundamental questions, including:

- How many young children live in the region?
- Of those children, how many live in families who need or want child care in Pitkin County?
- Does the available child care supply align with the needs and desires of families?
- How might the demand for care change in the future based on projected demographic changes?

Pairing quantitative data from the family survey conducted as part of the needs assessment and public data from sources such as the Colorado State Demography Office and the U.S. Census Bureau—alongside qualitative data collected through focus groups and interviews—can help answer these questions and inform decisions about whether or how to invest in initiatives to increase child care capacity in Aspen and Pitkin County.

## CONTEXT

### DEMOGRAPHIC CHANGES IN PITKIN COUNTY & THE BROADER REGION

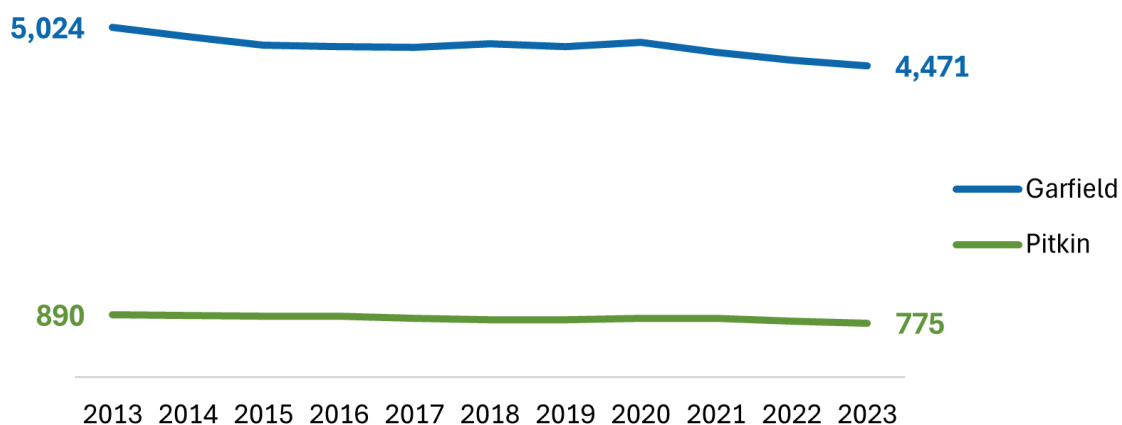
Changes in the child population of the region will naturally drive changes in demand for child care. Several data sources point to a declining population of young children in Pitkin County in recent years. The population of children under 6 in Pitkin County declined by nearly 13% (115 children) during the decade spanning 2013 to 2023.<sup>1</sup> Births to Pitkin County families fell by more than 11% between 2013 and 2023, and enrollment in the Aspen School District in 2024-2025 was approximately 10% lower than it had been a decade earlier.<sup>2,3</sup>

Neighboring Garfield County has also seen a decline in the number of children ages birth through 5. The number of births in Garfield County fell by 6% between 2013 and 2023, and the young child population declined by 11% during the same period.<sup>4,5</sup>

Comparable child population estimates specific to the small part of western Eagle County in the Roaring Fork Valley are not available from the Colorado State Demography Office. However, data from the U.S. Census Bureau show that the population of young children declined in Basalt between 2014-2018 and 2019-2023, while the population of young children in El Jebel increased significantly.<sup>6</sup>

The number of children ages birth to 5 has declined across the Roaring Fork Valley in recent years.\*

*Children under 6 by county, 2013 to 2023*



Source: Colorado State Demography Office. County Single Year of Age Estimates.

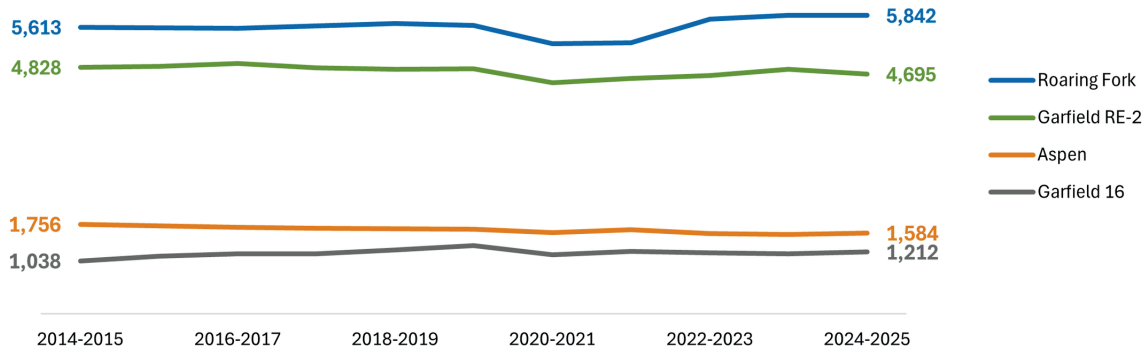
\*Comparable child population estimates specific to western Eagle County are not available.

## CONTEXT

### DEMOGRAPHIC CHANGES IN PITKIN COUNTY & THE BROADER REGION

School district enrollment has declined in Aspen and Garfield RE-2 in the past decade, while the student population grew in Roaring Fork and Garfield 16.

*Number of children in grades PK-12 by school district, 2014-15 to 2024-25*



Source: Colorado Department of Education. *Grade Level Membership by LEA*.

Population forecasts indicate that the young child population in Pitkin County is expected to continue declining through 2030, at which point it is projected to grow incrementally through 2040.<sup>7</sup> Overall, projections suggest Pitkin County's young child population will decline by 8% (61 children) between 2024 and 2040.<sup>8</sup> It is important to note, however, that housing developments on the horizon in Pitkin County – such as the Lumberyard development – are not yet reflected in population projections and could result in an increased number of children in the community above what current projections suggest.



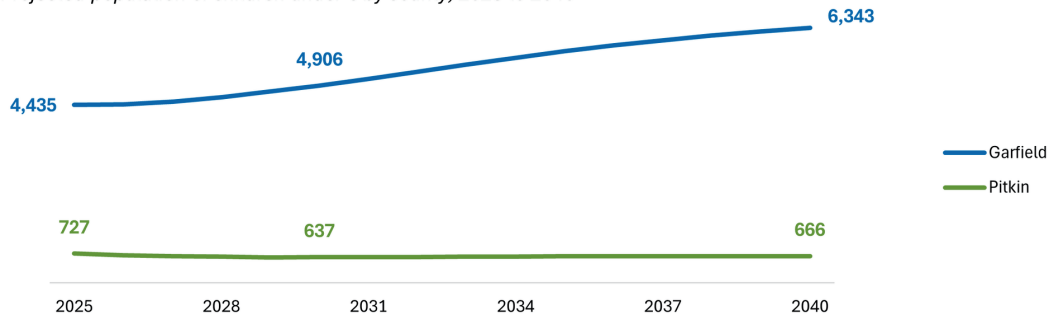
In contrast to Pitkin County, Garfield County's young child population is projected to increase significantly in the coming years, growing by 11% (471 children) between 2025 and 2030 and by 43% (nearly 2,000 children) between 2025 and 2040.<sup>9</sup> Considering Garfield and Pitkin counties together, the population of children under 6 is projected to increase by 36% (nearly 1,900 children) between 2025 and 2040.<sup>10</sup>

Overall, the young child population in Eagle County as a whole is expected to decline by 6% between 2025 and 2030 and increase by 28% between 2025 and 2040.<sup>11</sup>

## CONTEXT

Pitkin County is projected to see a decline in its population of young children between now and 2040, while Garfield County forecasts show a significant increase.

*Projected population of children under 6 by county, 2025 to 2040*



*Source: Colorado State Demography Office. County Single Year of Age Forecasts.*

## EMPLOYMENT AND WORKFORCE CHARACTERISTICS

Labor force participation among parents is another key driver of child care demand. The vast majority of young children in Pitkin County live in families where parents are working. Approximately 88% of Pitkin County children under 6 live in families where all parents in the family are in the labor force, significantly higher than the state-level rate of 67%.<sup>12</sup> Nearly 75% of young children in Eagle County and 67% of young children in Garfield County live in families where all parents are working.<sup>13</sup> Children in these households most likely need some sort of non-parental child care during a typical week.

Regional commuting patterns are also important to consider when estimating child care demand, as some parents may prefer to have their child cared for by a provider closer to their place of employment or along their route to work. Employers in Aspen and Pitkin County draw people from across the region, with the majority of the workforce coming from outside the county.<sup>14</sup> An estimated 15% of Garfield County workers and 11% of Eagle County workers commute to Pitkin County for their jobs.<sup>15</sup> These commuters are an important population to consider when estimating demand for care in Pitkin County.

Most young children across the Roaring Fork Valley live in families where all available parents are working.

*Children under 6 with all parents in family in the labor force, 2019-2023*



# ANALYSIS OF SUPPLY & DEMAND

## What is the existing supply of licensed child care in Pitkin County?

As of July 2025, Pitkin County is home to 14 licensed child care providers that serve young children: 10 center-based programs, two school-based preschool programs, one large family child care home, and one center operated by Aspen Ski Company for part of the year.\*<sup>16</sup> In addition to licensed providers, families also use license-exempt care provided by nannies or nanny shares, au pairs, family members, friends, or neighbors. Approximately 10% of survey respondents who use child care reported solely using license-exempt care, and many more use license-exempt care in combination with other forms of care (e.g., a nanny in combination with a licensed preschool). Focus group data also reflected these findings. The supply of licensed care is the primary focus of this analysis. However, given data collected for this assessment and national data indicating that many families rely on and/or prefer informal care, it is reasonable to assume that some families are having their child care needs met through informal care arrangements. This assessment seeks to understand what additional needs are not being met.

More than half of the licensed providers in Pitkin County (eight providers) are located in Aspen, with the remainder located in Basalt (3), Snowmass Village (2), and Woody Creek (1). In total, licensed providers in Pitkin County are licensed to serve a total of 508 young children as of July 2025.<sup>17</sup> In practice, the actual number of children who can be served is likely below this number due to staffing shortages or provider decisions to keep class sizes smaller.<sup>18</sup>

Licensed Child Care Capacity in Pitkin County (July 2025)*	
License Type	Licensed Capacity
Child care center (not operated by a school district)	428
Child care or preschool operated by a school district	68
Large family child care home	12
<b>TOTAL</b>	<b>508</b>

Source: Colorado Department of Early Childhood. Colorado Licensed Child Care Facilities Report, July 2025.

\* Child care capacity at the center operated by Aspen Ski Company is excluded from data on the number of child care slots in the community because they are only open for part of the year and largely serve tourists.

## ANALYSIS OF SUPPLY & DEMAND

### How does current supply compare to demand?

As of July 2025, Pitkin County has 508 licensed child care slots and an estimated 631 children under 6 who are not yet in kindergarten.<sup>+</sup> As noted previously, however, assessing whether child care supply can meet demand is more complex than comparing the population size to the amount of licensed care available. Other factors such as parent needs, preferences, and work schedules; commuting patterns; and differing availability of care by age group also influence demand for care. Each of these factors is examined below to deepen understanding of whether there are unmet needs for child care in Pitkin County.

### Among parents in the region, how many would prefer to have their children cared for by a Pitkin County provider?

Roaring Fork Valley parents and employers report long commute times by car or bus, and the location of care is especially important because families may need to add significant time to a commute to drop children off at care. In both focus groups and the survey, families were asked about their preferred child care locations.

Data from the family survey show that location is an important consideration for parents in need of child care, with an average importance ranking of 4 out of 5, where 5 is most important. However, location ranked below other factors such as quality of care, stability or reliability, and curriculum or educational activities.

Parents in the focus groups were asked if they would prefer care close to their home or close to where they work, and they were largely divided on this question. Parents who prefer care near home shared concerns with having children in the car for a long commute, wanting their children to be in care with the children they will go to elementary school with, and the desire to be close in case of an emergency. Parents who prefer care near work shared that they value being able to better align work and child care schedules, the ability to breastfeed during the day when children are infants, and the need to pick children up in an emergency. Many parents in the focus groups already had care in Pitkin County and shared that they see more need for additional care in Garfield County and western Eagle County than in Aspen.



<sup>+</sup> This estimated population number assumes one-third of 5-year-olds are not yet in kindergarten and will potentially need child care.

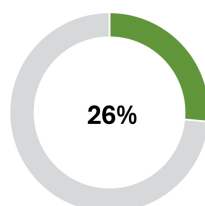
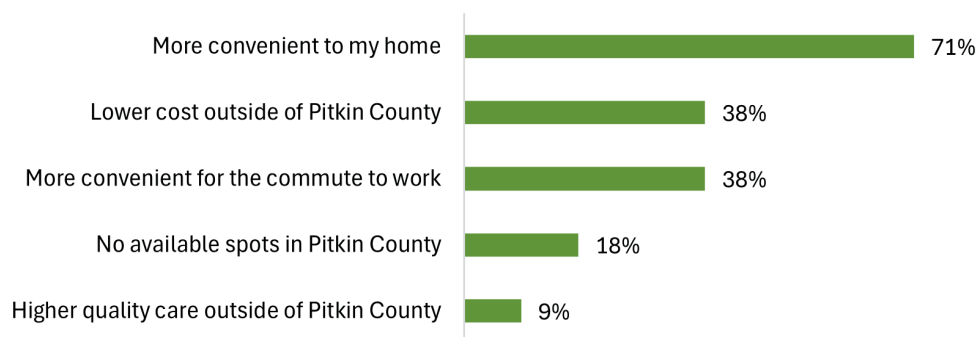
## ANALYSIS OF SUPPLY & DEMAND

**Preferences for the location of care by county of residence:** Family survey data show that nearly all families who live in Pitkin County and have a child in child care use a Pitkin County child care provider (91%), whether that care is licensed or license-exempt. Among respondents who live outside of Pitkin County but work in Pitkin County and have their child in some form of care, 34% reported they currently use care in Pitkin County.

**Reasons why commuters to Pitkin County use care in another location:** Respondents who commute to Pitkin County and use care in another county were asked why they use care outside of Pitkin County. The most commonly reported response was that it was more convenient to their home (71%). More than one-third (38%) reported using a provider outside of Pitkin County because it was more convenient for their commute to work, and 38% said they used care outside of Pitkin County because the cost was lower.

**Desire for Pitkin County care among commuting parents:** Among parents who commute to work in Pitkin County from another county in the valley and currently use a child care provider outside of Pitkin County, approximately one-quarter said they would prefer to use care in Pitkin County if an option met their needs. When asked what would need to change in order for them to use a provider in Pitkin County, nearly all said they would need a lower cost of care (94%). More than half (56%) indicated they would prefer to use a Pitkin County provider if there were more availability, and nearly 40% said they would use a Pitkin County provider if there were expanded operating hours.

When asked why they use a child care provider outside of Pitkin County, families who commute to Pitkin County for work cited convenience to home as a top factor in their decision.



of parents who commute to Pitkin County for work but currently use a child care provider in another county indicated they would prefer to use care in Pitkin County.

Source: Kids First Community Child Care Needs Survey.

## ANALYSIS OF SUPPLY & DEMAND

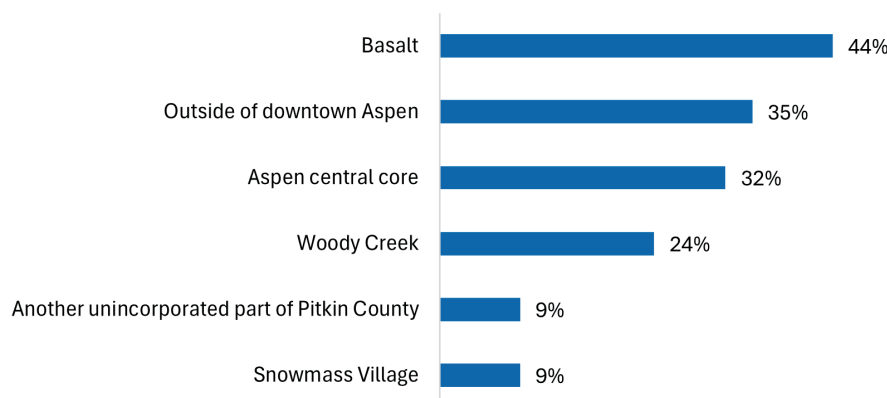
These preferences suggest that while most parents commuting to Pitkin County for work prefer to use a provider closer to their home, there is a sizable share of commuting parents who would like to have their children cared for by a Pitkin County provider. However, the cost of care (or perceived cost of care), availability of slots, and operating hours may be barriers to using a Pitkin County child care provider.

**Desire for Pitkin County care among parents who do not currently use child care:** Parents who do not currently use any form of child care are also potential users of child care in Pitkin County. Approximately two-thirds of these families reported they would use child care if an option met their needs. Of those parents, nearly 60% said they would prefer care in Pitkin County. The preference for Pitkin County care largely fell along geographic lines. There were strong preferences for Pitkin County care among families living in Pitkin County and little preference for Pitkin County care among families living elsewhere who are not currently using any form of child care.

### **Among parents who want care in Pitkin County, which parts of the county are perceived as most convenient?**

Survey respondents who indicated a preference for care in Pitkin County were also asked about their preferred locations within Pitkin County. The most popular location among these parents was Basalt, with 44% of parents indicating a preference for this area. The area outside of downtown Aspen (where the proposed Burlingame facility would be located) was the second-most popular location, chosen by 35% of parents. Aspen central core was the third most popular choice, with 32% of parents indicating a preference for care here.<sup>++</sup>

Basalt was the most preferred location for child care among parents who commute to Pitkin County for work from other counties and indicated they would prefer to use child care in Pitkin County.



Source: Kids First Community Child Care Needs Survey.

<sup>++</sup> Percentages will not add up to 100 because families could select more than one preferred location.

## ANALYSIS OF SUPPLY & DEMAND

Approximately 15% of workers who live in Garfield County and 11% of those who live in Eagle County commute to Pitkin County for work.<sup>\*\*19</sup> These data are for all workers, not specifically workers with children. However, if we assume that commuting percentages among parents are roughly similar and that one-quarter of commuter parents prefer care in Pitkin County (based on family survey results), children of commuting parents could represent an estimated additional 100 to 150 children who could be included in the estimated demand for Pitkin County care.

It is important to note, however, that a preference for care in Pitkin County does not guarantee that families will ultimately choose a child care slot in Pitkin County. Families may encounter other barriers related to affordability, operating hours, or preferences related to the program's curriculum, and the true demand for care from commuting parents may be below this estimate.

### How do supply and demand for child care vary by age group?

Parents who participated in the focus groups consistently shared that finding child care for infants and toddlers (children under 2.5 years old) was extremely difficult and that they do not feel like they have choices among providers when their children are very young. Some shared stories of joining waitlists early in their pregnancies and being on waitlists for years before getting care for their young child. Parents generally felt that there were far more options for care once their children reached preschool age. Providers echoed these observations, sharing that they are often operating at or near full capacity for infants and toddlers, but several have openings for preschool-aged children.

*“Infant care is so hard to find, it's all so expensive, and families don't get much of a choice in quality. It's just a matter of where you get in...”*

*- Family survey respondent*



*\*\* Note that the most recent available commuting pattern data from 2017 to 2021 include pre-pandemic years when employees were more likely to commute to a physical office. It is possible that commuting percentages are lower following the pandemic due to the increased prevalence of remote work. In the family survey, more than half of respondents indicated that someone in their household worked from home at least one day per week, and interview and focus group participants shared an observation that child care needs have shifted with the increase in hybrid or remote work following the pandemic.*

## ANALYSIS OF SUPPLY & DEMAND

These sentiments are borne out by data on licensed child care capacity by age group. As of July 2025, there were a maximum of 56 licensed slots for infants at Pitkin County providers, compared to an estimated 102 infants who live in Pitkin County.<sup>20,21</sup> (Note that this number does not include infants who live outside of Pitkin County whose parents may also want to use a Pitkin County provider, as discussed in the previous section). The number of slots for toddlers is slightly more sufficient relative to the population of children, with a maximum of 108 toddler slots for an estimated 168 toddlers in Pitkin County.<sup>22,23</sup> Preschool slots were the most readily available, with 354 licensed slots and an estimated 361 children between 2.5 and 5 years old and not yet in kindergarten.<sup>24,25+++</sup>

### **Is there enough child care in Pitkin County for all families who want it?**

Based on findings from the focus groups, provider interviews, licensing data, and family survey, it is likely that there is an unmet need for infant and toddler care in Pitkin County, particularly when factoring in potential demand from children who live outside the county. There are currently approximately 1.82 infants and 1.56 toddlers for every licensed child care slot, not including children whose parents commute to work in Pitkin County and indicate that they want care there. Including an estimated number of children from outside of Pitkin County whose parents indicate they want care in Pitkin County, these ratios increase to 2.36 infants per licensed slot and 1.89 toddlers per licensed slot.

The generally accepted definition of a licensed child care desert is an area with three or more children for every licensed slot.<sup>26</sup> Pitkin County does not meet this definition of a child care desert, but for infants and toddlers, there are still many more children than licensed child care slots. While these numbers do not account for the availability of informal, license-exempt care or parents who choose to care for their children at home, the qualitative data supports the conclusion that child care supply is not fully meeting the needs of families with children in this age range.

The amount of licensed preschool care available comes closer to meeting families' needs. There are approximately 1.02 preschool-aged children in Pitkin County for every licensed preschool slot.

*+++ Capacity numbers by age group will not sum to total capacity due to how child care licensing works for family child care homes. Large family child care homes are licensed to serve no more than two infants under 18 months and 12 children total. This analysis assumes the large family child care home in Pitkin County serves two infants and considers the remaining 10 slots in both the toddler and preschool categories. Therefore, it shows the maximum number of children who could be served in each age group.*

## ANALYSIS OF SUPPLY & DEMAND

Including estimated demand from outside Pitkin County, this ratio increases to 1.23 children per licensed slot, indicating preschool care still comes closer to meeting potential demand than care for infants and toddlers when children from outside the county are included.

Given that care for preschoolers is also more prevalent than infant and toddler care in Garfield and Eagle counties, and that parents and providers indicated that some parents prefer a preschool located near where their children will attend elementary school, there may be less demand for preschool in Pitkin County among commuters. Providers and families shared during interviews and focus groups that they felt preschool care was much more accessible, and parents felt they had more options from which to choose. Quantitative and qualitative data suggest that the creation of additional preschool slots will likely create an oversupply of care for this age group in the immediate future. Many providers and some focus group participants expressed this concern and shared that vacant preschool slots are negatively impacting the finances of existing child care providers.

*“There isn't enough child care for infants, and there's plenty of child care for children between 3 and 5 years old.”*

*- Family survey respondent*

### **Will there be sufficient child care supply to meet demand in the future?**

When contemplating significant investments in new child care facilities, it is important to consider potential future demand for care to ensure providers can remain sustainable in the long term. Several factors can influence changes in demand for child care, including population growth or decline, the creation of additional housing developments in the region, the arrival or departure of major employers, or policy changes.

As noted earlier in this report, Pitkin County's young child population is projected to shrink through 2029, at which point it is projected to increase slowly through 2040.<sup>27</sup> All in all, the county is projected to see a net loss of 61 children ages birth to 5 by 2040 with most of the population loss occurring before 2030.<sup>28</sup> Garfield County, however, is forecast to see significant growth in its population of young children, with a projected increase of more than 1,900 children by 2040, and this growth will result in a net gain of young children for the region as a whole.<sup>29^</sup>

<sup>^</sup> As noted previously, population forecasts for the portion of western Eagle County included in the Roaring Fork Valley are not available. The young child population in Eagle County as a whole is forecast to increase by 24% by 2040.

## ANALYSIS OF SUPPLY & DEMAND

County	Population Forecasts for Children Under 6		Change in Young Child Population, 2025 to 2040
	2025	2040	
Pitkin County	727	666	-61 (-8%)
Garfield County	4,435	6,343	+1,908 (+43%)
<b>Net Total for Pitkin and Garfield counties</b>	<b>5,162</b>	<b>7,009</b>	<b>+1,847 (+36%)</b>

*Source: Calculations based on data from the Colorado State Demography Office, County Single Year of Age Forecasts.*

While it is not possible to predict how many of these additional Garfield County children will have parents who commute to work in Pitkin County, data from the family survey suggest that a sizable share of families living in Garfield County and commuting to Pitkin either already use care in Pitkin County or would prefer to if an option met their needs. If a significant number of parents continue to commute to work in Pitkin County and prefer child care there, current shortages for infant and toddler care could be exacerbated, and demand for preschool care could increase as well.

Another factor that could influence the demand for care in the future is the construction of new housing developments in the region. The Lumberyard project, for example, is expected to include 277 new rental units in Aspen by 2029, and increased availability of housing could result in an increased number of families with young children in Pitkin County. There are also housing developments in the pipeline in Basalt, Carbondale, Glenwood Springs, and the area from New Castle to Parachute that could increase the young child population above what is forecast by current population projections.<sup>30</sup>



## ANALYSIS OF SUPPLY & DEMAND

Local and state-level policy changes also have the potential to affect the demand for child care. One possible change on the horizon is the potential creation of a special district from Aspen to Parachute that would direct additional funds to make child care more accessible to families by offering tuition credits for families and subsidies for providers. The question of whether to create this special district is expected to be referred to voters in the region in the fall of 2025. If voters approve it and child care costs are significantly reduced for families, Pitkin County could see increased demand from families who are currently priced out of child care. Conversely, if the creation of the special district leads to increased child care capacity outside of Pitkin County, it is possible that demand for child care in Pitkin County could soften among families living in Garfield and Eagle counties.

### CHILD CARE WAITLISTS

Most child care providers interviewed in Pitkin County maintain waitlists for their programs. They use these waitlists to provide parents the opportunity to express interest in a program and to maintain a contact list that they can use should a spot become available. Waitlists are important for helping child care providers understand and manage demand and availability. In focus groups, parents shared stories of putting children on waitlists well before children were born and remaining on waitlists for years before securing a spot.

These stories from families and recent waitlist numbers demonstrate unmet need for child care. However, they are best considered as an anecdotal source of data rather than a way to quantify child care need. Child care providers were asked to share their experience with waitlists, and most shared the following observations:

- Families often remain on waitlists after they have found care because they are waiting for availability with a preferred provider.
- When providers call families on the waitlist, they often contact several families who have already found care but did not remove themselves from the waitlist.
- Families are typically on many different waitlists simultaneously. This was confirmed by more than half of parents who responded to the family survey indicating they had placed their child on multiple waitlists for care, as well as focus group participants who shared the same practice.

## ANALYSIS OF SUPPLY & DEMAND

### Do families have access to the care they want and need?

When analyzing demand for child care, it is important to consider not just the number of slots needed, but also the specific characteristics families are seeking. In other words, a meaningful supply and demand analysis must assess whether the available options align with the particular needs and preferences of families.

While this report contains calculations that illustrate the supply of licensed child care slots and the estimated current and future demand for those slots, it also must recognize the multifaceted nature of what families need. In order to understand whether families who live or work in Pitkin County have access to child care (i.e., whether the available supply is able to meet the need), this report evaluates multiple factors, as outlined below.

Dimension of access	Defining question	Summary
Availability	Are there slots available for children who need it?	Availability of slots is highly dependent on age group. Infant slots are most limited relative to the population of the region, followed by toddler slots. Slots for preschool-aged children are the most widely available, and many providers are beginning to see indications that there is an oversupply of preschool slots.
Affordability	Can families afford to pay for care?	Many families struggle to afford care and see child care in Aspen as particularly expensive, even with the financial aid that is available.
Location	Is the location of care physically accessible to families?	Many families commute very long distances and generally wish to minimize the amount of time they spend traveling to and from child care. There seems to be more need for additional child care in Garfield County and/or western Eagle County, with less need in Aspen. Families differ in their desire to have care closer to work or closer to home.

## ANALYSIS OF SUPPLY & DEMAND

Schedule	Do providers offer schedules that align with families' work?	The days and hours of care available do not align with many families' work schedules, especially when combined with long commutes. Many families need longer hours than are currently offered and/or care on additional days (i.e., weekends). Families are often relying on multiple licensed and unlicensed care providers or flexibility from their employers to make up for the shorter-than-desired operating hours of centers.
Quality	Does available care match the quality indicators that are valued by families?	Families are generally very happy with the quality of licensed care available in Pitkin County. However, some families that have not been able to access licensed care shared concerns about the safety and developmental appropriateness of the unlicensed care options they have identified.
Sustainability	Can providers afford operating costs on an ongoing basis?	Providers are experiencing challenges with recruiting and retaining staff as well as covering the difference between the true cost of care and revenue from subsidies and parent tuition. Centers providing infant and toddler care are experiencing the most acute difficulty as they see their preschool enrollment declining.
Family Choice	Do families have the option to select care that aligns with their culture, values, and priorities?	Families are generally very happy with the care that exists in Pitkin County. They have choices for care once their children reach preschool, but they do not have options when children are younger.

**Overall, this assessment finds that the primary areas in which currently available options do not consistently meet families' needs are:**

- Availability/supply for infants and toddlers
- Schedule/hours of operation
- Affordability of care

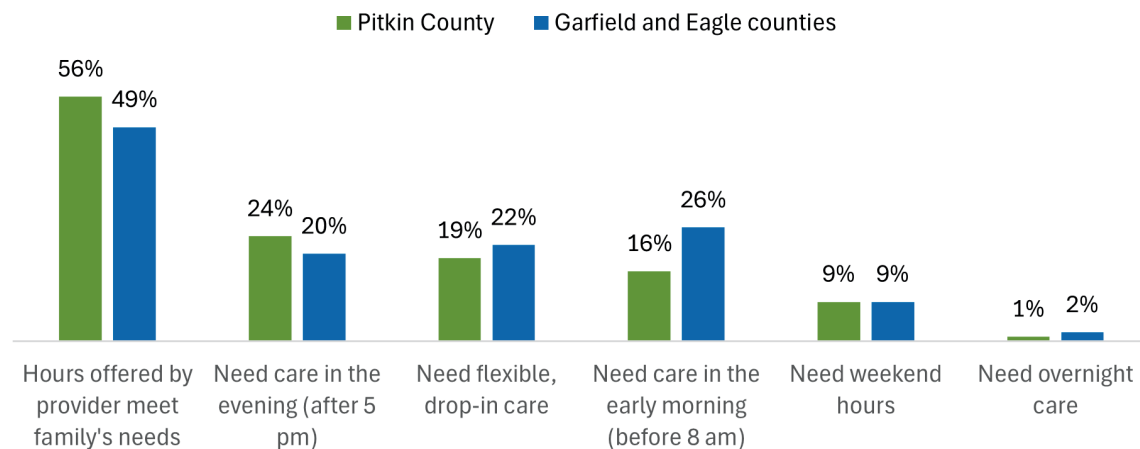
## ANALYSIS OF SUPPLY & DEMAND

### Hours of Operation

Due to the concentration of service and hospitality-oriented jobs, as well as the commuting patterns in the Roaring Fork Valley, many families have a need for care outside of traditional hours. Many families who have care find the hours offered by their provider to be shorter than what they would prefer: only about half of the families who responded to the survey reported that the hours offered by their current provider meet their needs .

Approximately half of families who use child care in the region report that their provider's hours meet their needs. Evening care, flexible or drop-in care, and early morning care were identified as the biggest unmet needs.

*Sufficiency of current child care provider hours among families who use non-parental care*



*Source: Kids First Community Child Care Needs Survey.*

Focus group data aligns with the family survey data. In focus groups, working parents generally shared that they feel like the hours of care are shorter than what they need, and many struggle to get to work on time with their current provider's schedule. Other parents shared that they are not able to work because they couldn't find care that aligns with their schedule.

“Limited hours for pick up are difficult when the traffic in Pitkin County is so terrible. For example, a 4:30 pick up time means my spouse must leave work at least an hour early and risk not working during his salaried time. Also, having children be in the car for an hour before and after work hours to drive to care is terrible.”

- Family survey respondent

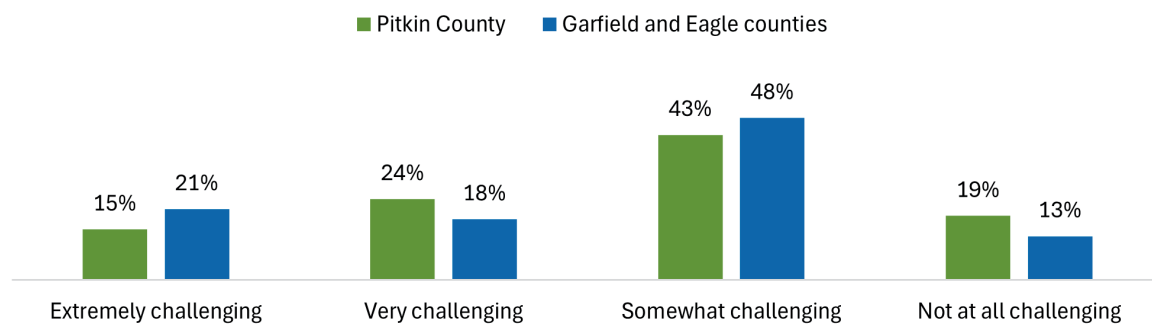
## ANALYSIS OF SUPPLY & DEMAND

### Affordability of Care

Through focus groups, several families shared that affordability is a barrier to accessing child care. Even with financial aid available for families whose children are in care in Pitkin County, only a small percentage of families indicate that affording care is not at all challenging.

Although many families in Pitkin County receive subsidies to help with the cost of child care, some still report that affording child care is extremely challenging.

*Difficulty affording child care costs each month among families using some form of non-parental care*



*Source: Kids First Community Child Care Needs Survey.*

Since 2016, the U.S. Department of Health and Human Services has used a benchmark that considers child care affordable if families pay no more than 7% of their household income for child care costs.<sup>31</sup> Kids First provides financial aid for families who live or work in Pitkin County, limiting their family contribution to 10% to 20% of household income (with higher income families expected to contribute a greater percentage of their income). Kids First is generally able to provide financial aid that supplements other available sources (e.g., CCCAP) and helps support families' child care tuition within these thresholds.

In the survey, families who currently have their children in care were asked how much they are paying per month. The majority of families with children in care in Pitkin County (63%) indicated that they are paying \$1,000 to \$2,000 per month, and 7% were paying more than \$2,000 per month. For families with children in care outside of Pitkin County, 44% paid between \$1,000 and \$2,000 per month, and 9% paid more than \$2,000 per month. These data include all types of child care, both licensed and informal/license-exempt.

For families whose child(ren) are NOT currently in any form of non-parental child care but indicated they would like to use care in Pitkin County if an option met their needs, the average amount they reported they could pay per child, per month was \$788.

# PROVIDER SUSTAINABILITY

When considering building additional child care supply, it is important to recognize that **any efforts to create additional supply will only have a net positive impact if existing supply is preserved as well.** Through interviews with providers, this assessment identified the following themes related to the sustainability of existing child care providers:

**Providers are experiencing challenges with financial sustainability.** Many providers shared the challenges of keeping their centers afloat financially. Similar to child care businesses across the country, they struggle to cover the cost of care while keeping costs manageable for families. Directors generally shared a desire for more unrestricted general operating funding to help them bridge the gap between the cost of care and parent tuition payments without onerous reporting requirements.

**Recruitment and retention of staff is one of the biggest challenges for centers.** Many directors expressed that they have struggled to find qualified staff in the valley. Directors are finding that staff often cannot afford to live near where they are working, so many are commuting long distances. They have also found that staff are more likely to stay if they are able to find affordable housing.

**Centers have experienced financial challenges as they struggle to keep preschool spots fully enrolled.** Private centers observed that many families move to other programs when their children reach preschool age. Providers observed that Colorado's Universal Pre-K (UPK) program has impacted preschool enrollment, as there has been an increase in preschool availability. Generally, because of the larger ratios allowed for older children, child care is most financially viable when infant/toddler and preschool care can be located together. Centers that have underenrolled preschool classrooms are further challenged to cover the costs associated



# CONSIDERATIONS & NEXT STEPS

## OPPORTUNITIES AND ASSETS

There are many opportunities to leverage existing assets to support child care in Pitkin County.

**The community has demonstrated a strong commitment to child care.** There is a strong commitment in the community to support child care for working families. The sales tax that funds Kids First's programs is one of the first that was established in the state. Community members are proud of the commitment to child care and want Aspen to be a good place to raise a family into the future.

**Child care in Pitkin County is perceived as high-quality by families and the community.**

Two-thirds of respondents (66%) who report having children in child care in Pitkin County report being very satisfied with the quality of their care, and an additional 30% report being somewhat satisfied. In contrast, 51% of respondents whose child was in care in a different county reported being very satisfied with the quality of their care, and 35% were somewhat satisfied. Throughout the development of this report, families and community members expressed a high degree of confidence in the quality of licensed child care in Pitkin County. Families value the options that exist and generally see the offerings as very high-quality.

*"I am extremely impressed with the child care we use. The incorporation of the outdoors, physical activity, and learning is amazing!"*

*- Family survey respondent*

**Local funding for financial aid is available to families.** For any family that lives or works in Pitkin County, their out-of-pocket cost for care is capped at 7% to 20% of gross income\*, with higher-income families contributing the higher percentage. In recognition of the very high cost of living in the area, Kids First has extended this financial aid well beyond the typical range in many other communities, with families up to 649% of the Federal Poverty Level (more than \$208,000 for a family of four) eligible for aid.<sup>32</sup> While many families still find it a challenge to afford care, it is noteworthy that local funding is able to provide financial aid for so many families in the area and that this funding extends beyond just those who live in Aspen to the workforce in Pitkin County more generally.

*\*City of Aspen recently lowered the out-of-pocket cap for some families from 10% to 7% of household income in an effort to improve affordability for families. The data in this needs assessment was gathered prior to this change.*

## CONSIDERATIONS & NEXT STEPS

**Regional efforts to support child care are underway.** The Roaring Fork Valley is deeply interconnected. While Kids First is funded by a city sales tax and a department of the City of Aspen, they are committed to serving any family that lives or works in Pitkin County in recognition of the economic importance of the valley-wide workforce. The Confluence Early Childhood Education (CECE) Coalition is also engaging in robust efforts to fund and support child care through a connected infrastructure spanning the Roaring Fork Valley.

**Opportunities exist for additional supply building.** With local and statewide efforts to support the development of affordable housing, there are opportunities to leverage the co-location of child care facilities to reduce upfront costs and contribute to the long-term sustainability of new child care operations.

**Pitkin County has many long-time, consistent child care providers.** Many centers that exist in Pitkin County have been in place for many years, and many have staff who have worked in their centers for a significant amount of time as well. Families and the community appreciate this stability. Consistency of care is an important factor that can help to support families and provide peace of mind.

### EVALUATION OF NEED FOR A NEW CHILD CARE CENTER AT BURLINGAME RANCH

Overall, this assessment concludes that there is a need for additional infant and toddler care in Pitkin County. At this time, the data does not indicate a need for additional preschool-age care and indicates that increasing the supply of such care could negatively impact the availability of care more generally. In focus groups, many families indicated that Burlingame is not the preferred location for care for anyone who does not live there. However, it is still likely that families with infants and toddlers would use care at Burlingame because they are struggling to identify other suitable options.

This assessment also concludes that the Burlingame child care center, as currently envisioned, has potential to harm the existing child care infrastructure by contributing to an oversupply of preschool slots. It is critical to recognize that this needs assessment captures one moment in time and that the development of a new facility takes time, during which conditions can shift and change. There could be a need for additional preschool capacity in the future, and, as detailed above, factors both in and outside of Aspen have potential for creating shifts in demand.

## CONSIDERATIONS & NEXT STEPS

The proposed facility will require a significant investment, so if a child care center is created at Burlingame, it is critical that it both responds to current conditions and has the flexibility to shift and respond to changes (both physically and operationally) in the future. The following are critical considerations for the Burlingame child care site and the evaluation of alternative options:

- **How would the creation of additional preschool slots impact the financial viability of new and existing centers?** The proposed Burlingame facility would create slots for 16 infants, 20 toddlers, and 58 preschoolers. This means that there would be approximately 0.94 children (including both Pitkin County and potential commuters) for or 0.88 children (including only Pitkin County) for each licensed preschool slot in Pitkin County, creating an estimated oversupply of preschool. This calculation also does not account for families who choose to use parental or license-exempt/informal care. Child care centers typically rely on the higher adult-to-child ratios allowed for preschool to offset the staffing costs of the lower ratios required for infants and toddlers. A center that charges affordable tuition for families is unlikely to be able to operate sustainably without preschoolers or significant subsidies. However, increasing preschool capacity is likely to have a negative impact on the ability of both existing centers and this new center to operate sustainably due to preschool underenrollment.
- **Can the center be designed flexibly to accommodate changes in need in the future?** In small communities, year-to-year fluctuations in the birth rate can create meaningful shifts in demand for care among specific age groups – presenting challenges for providers. Providers shared that they have seen these types of shifts over time. Additionally, outside factors such as the development of new family housing units or unexpected shifts in demographics can impact demand for different age groups. Because child care licensing has varying requirements for different age groups (e.g., square footage per child, bathroom and handwashing station requirements, etc.), a new center should be designed so that classroom configurations and staffing can be adjusted to meet the differing age requirements for various ages over time in response to current needs, or it will likely struggle with enrollment as needs shift.
- **Could this center be adequately staffed? What might the impact on staffing at other centers be?** The proposed Burlingame child care center will require approximately 24 staff members. Existing providers shared that one of the most significant challenges they face is recruiting and retaining qualified staff. A new center is likely to face the same challenge and could divert some staff away from existing centers. The City should explore whether there are resources that can be used to support all centers in recruitment and retention efforts, benefiting existing and potential new centers alike. For example, the City could support the creation of housing options for child care providers that could support staffing for all centers.

## CONSIDERATIONS & NEXT STEPS

- **Could this center be designed to accommodate the unmet schedule needs of families?** The largest unmet need identified by families was a schedule with extended hours and days. A center that provides an expanded schedule is much more of a need than an additional center with a similar schedule to what is currently offered.
- **Can tuition be affordable for families?** Even with existing financial aid programs, some families see child care tuition as prohibitive, especially those who live outside of Pitkin County. Can the operating model of the center be designed to allow the selected operator to offer tuition that is affordable to families?
- **Is the benefit of the proposed facility sufficient for the cost?** Are there other strategies that would have a more positive impact on child care access? The estimated cost to develop this facility in 2022 was \$15 million, and it is likely that this cost is now higher. The facility proposed would serve a maximum of 94 children. The proposed investment is high - over \$150,000 per new child care slot created. Considering the need to preserve existing centers, the opportunity to participate in regional initiatives, and the current barriers to child care access faced by families, the City should consider evaluating the full range of potential options for allocating funding to gauge what would have the greatest net positive impact on child care supply for those who live or work in Aspen. Another option is to consider whether there are opportunities to make an impact with a smaller-scale center or design elements that would reduce the overall cost per child.
- **Is there community support for the Burlingame facility?** While the survey did not directly address this question, in family focus groups and provider and community member interviews it is worth noting a lack of widespread enthusiasm for the project, and many participants expressed opposition to the construction of a new center. Participants were not selected randomly, however, so it may be that there is community support that was not captured in these groups. If the project is to be pursued, there will be a need for fundraising from the community, and it is worth considering whether there has been a shift in community sentiment since the initial development of the plan for the Burlingame child care center.



## CONSIDERATIONS & NEXT STEPS

### ADDITIONAL RECOMMENDATIONS

**Ensure that existing child care supply is supported and sustained.** Current child care options in Aspen are generally seen as high-quality and desirable for families in the Roaring Fork Valley. However, the business model of child care is tenuous, and many centers are seeing that the cost of care and retaining qualified teachers poses a significant challenge. Any loss of existing child care slots will create additional need and offset any gains produced by the development of a new facility. Centers could benefit from workforce development programs (such as dedicated housing or wage enhancement) as well as financial support to stabilize revenue (such as base funding or enhanced payments for infant and toddler care).

**Consider support for other types of care (e.g., family, friend, and neighbor providers or family child care homes) and smaller-scale centers.** Efforts to support child care in Pitkin County to date have primarily focused on large centers. However, some families prefer home-based care for infants and toddlers because of the more familiar home environment and low provider-to-child ratios (among other factors). There are also smaller format license types available (small centers<sup>^^</sup> or infant centers, for example) that may provide an effective option for younger children. While licensing considerations for home-based care can limit options in rural resort regions where many potential providers live in multi-family settings, efforts to support both licensed and license-exempt home-based care could complement current efforts to support larger centers and may present opportunities to create new choices for families and different models for providers.

**Ensure families across the region are aware of Kids First financial aid and consider expanding the support available through financial aid as funding allows.** In several focus group conversations and interviews, participants expressed misconceptions about eligibility and other factors related to the financial aid provided by Kids First. Outreach and education efforts, especially for those who live outside of the area but would be eligible due to their employment, could be valuable to ensure families understand all of their options. Additionally, if adequate funding is available, then families would benefit from additional financial aid that further limits the amount of their household income that parents are expected to contribute.

**Support coordinated child care planning efforts across the Roaring Fork Valley.** While this assessment did not evaluate child care capacity in the Roaring Fork Valley outside of Pitkin County, reports from the CECE Coalition, demographic projections, and feedback from families indicate that there is likely a greater need for additional care downvalley.<sup>33</sup> Efforts to secure regional public funding for child care are underway. Kids First and the City of Aspen would benefit from coordinating with these efforts to ensure that funding and strategies to support care are maximized. Additionally, if regional funding increases supply in other parts of the valley, this could impact the need for care in Aspen.

<sup>^^</sup> As of the writing of this report, a small center license can only serve children over 2 years old. The Colorado Department of Early Childhood Rules Advisory Committee is considering changes that would allow for small centers to serve younger children as well.

# CONCLUSION

The two primary goals of this assessment were to understand current and future demand for child care in Pitkin County and to assess the need for a child care center at Burlingame Ranch. A comprehensive review of the current context identified that while existing programs are supporting families in many ways, unmet needs for child care still exist. Most notably, families struggle to find care for children under 2.5 years old, pay for care, and find care that aligns with their scheduling needs. Additionally, the long-term viability of some centers is threatened by lost revenue when preschool slots are underenrolled, as well as challenges with recruiting and retaining qualified staff.

Therefore, this assessment concludes that there is a need to create additional child care capacity and recommends a targeted and specific focus on ensuring that the creation of new facilities and child care programs are aligned with the specific demonstrated needs of families, are created flexibly to adapt to future shifts in demand, and that new facilities are paired with new or enhanced policies to ensure that existing supply is preserved.



# APPENDICES

## APPENDIX A: SURVEY OVERVIEW AND RESPONDENT CHARACTERISTICS

The consulting team created a comprehensive survey for Kids First that assessed the child care needs, preferences, and experiences of families between Aspen and Parachute. The survey was available via SurveyMonkey in both English and Spanish. It was open for responses from mid-April 2025 until early June 2025 and received 300 valid responses from across the region, with 278 responses in English and 22 in Spanish. Responses were collected via convenience sampling and snowball sampling methods. The survey was distributed widely among child care providers, school districts, employers, libraries, local media, parent groups, and nonprofits in the region. Focus group participants were also invited to complete the survey.

The below table summarizes characteristics of survey respondents. The target respondent group was families with young children who live and/or work in Pitkin County. There is no perfectly comparable population in existing public data sets, but demographic data indicate that the sample resembles the population of people living in Pitkin County on key characteristics, such as family income and race/ethnicity. When examining demographic data for the population living across Pitkin, Garfield, and Eagle counties, Hispanic/Latino families and families earning less than \$75,000 per year are somewhat underrepresented in the sample. However, these groups still made up sizable shares of the survey population (see table below).

Characteristics	% of respondents
County and/or jurisdiction of residence:	Pitkin County: 56% Aspen: 54% Snowmass Village: 18% Unincorporated part of Pitkin County: 12% Basalt: 10% Woody Creek: 5% Garfield County: 36% Eagle County: 7%
Work location:	At least one person working in Pitkin County: 75%

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Remote work:	<ul style="list-style-type: none"> <li>Someone in household works from home at least one day per week: 55%</li> <li>No one in household works from home: 45%</li> </ul>
Employment status:	<ul style="list-style-type: none"> <li>All parents working either part-time or full-time: 84%</li> <li>One parent working either part-time or full-time: 12%</li> <li>Prefer not to say: 4%</li> </ul>
Age of young child(ren):	<ul style="list-style-type: none"> <li>Infants (under 12 months): 25%</li> <li>Toddlers (1 year to 2.5 years): 40%</li> <li>Preschoolers (2.5 years to 5 years old, not yet in kindergarten): 64%</li> </ul> <p><i>Percentages add to more than 100 because families can have children in multiple age groups.</i></p>
Number of young children:	<ul style="list-style-type: none"> <li>One: 64%</li> <li>Two: 29%</li> <li>Three or more: 7%</li> </ul>
Age of respondents:	<ul style="list-style-type: none"> <li>18 to 24: Less than 1%</li> <li>25 to 34: 24%</li> <li>35 to 44: 69%</li> <li>45 to 54: 5%</li> <li>55 to 64: 1%</li> </ul>
Race/ethnicity of respondents:	<ul style="list-style-type: none"> <li>White: 77%</li> <li>Hispanic or Latino: 19%</li> <li>Multiracial: 2%</li> <li>Asian: 2%</li> <li>American Indian or Alaska Native: &lt;1%</li> <li>Black or African-American: &lt;1%</li> </ul>

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Annual household income:	<ul style="list-style-type: none"> <li>Below \$35,000: 3%</li> <li>\$35,000 to \$49,999: 3%</li> <li>\$50,000 to \$74,999: 8%</li> <li>\$75,000 to \$99,999: 13%</li> <li>\$100,000 to \$149,999: 28%</li> <li>\$150,000 to \$199,999: 14%</li> <li>\$200,000 or above: 19%</li> </ul>
Receipt of any government funding for child care (e.g., Kids First Financial Aid, program scholarships, the Child Care Assistance Program (CCCAP), TANF, or military child care benefits):	<ul style="list-style-type: none"> <li>Yes: 15%</li> <li>No: 83%</li> <li>Not sure: 2%</li> </ul>

### APPENDIX B: DETAILED INFORMATION ON FAMILIES' CURRENT CHILD CARE ARRANGEMENTS

**Use of child care:** Most families living in the region from Aspen to Parachute report using some form of child care. Approximately 83% of survey respondents reported using some form of non-parental child care, whether formal (e.g., a child care center, family child care home, or school district preschool) or informal/license-exempt (e.g., a nanny, an au pair, a family member, or a neighbor). Households with preschool-aged children (ages 2.5 to 5 years old and not yet in kindergarten) were most likely to report using child care (84%), while households with infants used non-parental care at the lowest rates (73%). Households in Pitkin County were more likely to report using non-parental care than households in Garfield and Eagle counties (86% vs. 78%).

**Source(s) of child care:** The most common source of child care for respondents who live in Pitkin County was a child care center (not operated by a school district), with 72% of respondents indicating they use this form of care at some point during a typical week. The next-most common sources of care were an unpaid adult family member (24%) and a child care or preschool program operated by a school district (16%).<sup>#</sup> More than a third of Pitkin County families (34%) report using multiple types of care during a typical week, suggesting that many families piece together care from multiple sources in order to meet their child care needs.

<sup>#</sup> Note that percentages will add up to more than 100 because families could report using multiple sources of care.

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Among Pitkin County families whose children were in some form of child care, 83% reported that their current type of child care was their ideal form of care, and 17% reported they preferred a different type of care. Among those who preferred a different type of care, 70% preferred some type of licensed care (e.g., a child care center or family child care home).

Child care centers (not operated by a school district) were also the most commonly reported source of care for families in Garfield and Eagle counties (57%), followed by unpaid adult family members (33%) and school district-operated child care or preschool programs (14%).

Approximately 42% of Garfield and Eagle County families reported using multiple sources of care during a typical week. Families in Garfield and Eagle counties were much more likely to report using informal or license-exempt care than families in Pitkin County (56% of respondents in Garfield and Eagle counties, compared to 33% of families in Pitkin County).

The share of Garfield and Eagle County families reporting that their current form of care was their most preferred type of care was significantly lower than in Pitkin County, at 57%. Among those who reported they would prefer another type of care, 75% preferred some type of licensed care.

**Travel times to child care:** Some families in the region have long commutes to child care, either because they are unable to find care that meets their needs close to home or because they prefer to have their children in care closer to where they work. Travel times to child care vary across the region. Across all survey respondents, the average time traveled to their child care provider on a typical day with good weather was 18 minutes. Travel times were higher, on average, for families in Eagle and Garfield counties, who report traveling an average of 23 minutes to their child care provider, compared to 15 minutes for families in Pitkin County. Families who live in Garfield or Eagle County but work in Pitkin County had the highest average travel time to care, at 30 minutes.

**Difficulty finding child care:** Families in Garfield and Eagle counties were more than twice as likely as those in Pitkin County to report having a hard time finding care for their child, with 48% reporting that finding child care was very difficult, compared to 19% in Pitkin County. Across the region as a whole, families with infants and toddlers (under age 2.5) were more likely to report that finding care had been very difficult than those with preschoolers, reflecting the wider availability of preschool slots in the region.

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**Satisfaction with care:** Overall, families who use some form of non-parental child care report being satisfied with their care. Nearly half (47%) of respondents from across the region indicated they were very satisfied with their care, and an additional 41% reported being somewhat satisfied. Overall satisfaction levels were fairly consistent across counties. Among those who were not satisfied with their care, cost, and a mismatch between provider operating hours and families' work schedules were commonly reported sources of frustration.

Families whose children were in care in Pitkin County were more likely to report being satisfied with the location of their child care provider(s) than respondents whose children were in care in Garfield or Eagle counties. Nearly 70% of Pitkin County respondents indicated they were very satisfied with the location of their child's care provider, compared to 49% of those in Garfield and Eagle counties. This gap in satisfaction could be a reflection of the longer travel times reported by families who live outside of Pitkin County.

The highest levels of dissatisfaction were related to the cost of care. More than a third of respondents in Pitkin County and in Garfield or Eagle counties reported being very or somewhat dissatisfied with the cost of care. When asked what they currently pay for child care for one child, the most commonly reported cost bracket among families whose child was in care in Pitkin County was between \$1,000 and \$1,499 per month (33%), followed by \$1,500 to \$1,999 (24%). In total, 70% of families whose children were in care in Pitkin County reported paying more than \$1,000 per month for one child. Costs reported by families using care in Garfield and Eagle counties were generally lower, with approximately half of all respondents using care in one of these counties reporting that they pay more than \$1,000 per month.



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**Factors parents prioritize in child care decisions:** Parents were asked to rate the importance of several factors that are often considered in child care decisions on a scale from 1 to 5, where 5 is most important. Quality of care, the stability or reliability of care, and the provider's curriculum and educational activities were rated as the top three priorities:

Factor	Average Rating (1 to 5, where 1 = not at all important and 5 = extremely important)
Quality of care*	4.9
Stability or reliability	4.8
Curriculum and educational activities	4.4
Hours of operation	4.3
Provider was someone I know/trust	4.2
Cost	4.2
Proximity to home	4.0
Proximity to work or school	4.0
Cultural/language considerations	3.5

*\*Quality of care was not explicitly defined and reflects how parents evaluate quality for themselves.*

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**Parents who do not use any form of child care:** Some children in the region are not regularly cared for by anyone other than a parent or guardian – either due to parental preference or because they are unable to find and/or afford care. Approximately 14% of Pitkin County respondents and 22% of Eagle and Garfield County respondents reported their children were not cared for by anyone besides a parent or guardian. When asked why they do not use any form of non-parental care for their children, the most commonly reported reason was that care was too expensive (70%), followed by parental preference to care for their child(ren) (38%) and inability to find an available slot (32%).

When asked if they would use a child care provider for their children if an option met their needs, 65% said yes. However, the cost of care may be a barrier for these families even if they found a provider who met their needs. When asked what they could afford to pay for child care for one child, the average amount reported by families whose children were not in any form of child care was \$788 per month.

**Employment impacts of child care challenges:** Employment disruptions due to problems with child care affect many parents in the region. Approximately 37% of survey respondents reported that child care problems caused someone in their family to quit a job, not take a job, or greatly change their job in the past 12 months due to problems with child care. More than half reported that child care challenges had caused them to use vacation days, sick days, or other paid leave, and one-third reported that they had to take unpaid leave. More than 40% reported cutting their work hours due to child care problems. Approximately 12% reported they had left a job due to child care challenges, and nearly 20% reported not looking for a job in order to care for children.

**Cost of child care:** Parents who currently have child(ren) in child care were asked how much they pay. This includes all forms of licensed and license-exempt/informal care.

### **Families in care in Pitkin County:**

- \$0 (care is free): 2%
- Less than \$250: 3%
- \$250 to \$499: 4%
- \$500 to \$749: 11%
- \$750 to \$999: 9%
- \$1,000 to \$1,499: 35%
- \$1,500 to \$1,999: 28%
- More than \$2,000: 7%

### **Families in care outside of Pitkin County:**

- \$0 (care is free): 7%
- Less than \$250: 7%
- \$250 to \$499: 6%
- \$500 to \$749: 16%
- \$750 to \$999: 11%
- \$1,000 to \$1,499: 28%
- \$1,500 to \$1,999: 16%
- More than \$2,000: 9%

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### APPENDIX C: FOCUS GROUPS

Focus groups were held May and June 2025. One in-person and three virtual focus groups were held. The in-person focus group was conducted in English, two of the virtual focus groups were conducted with simultaneous interpretation in English and Spanish, and the third virtual focus group was conducted in Spanish. The purpose of these focus groups was to hear directly from parents to help inform data analysis and recommendations.

In total, 22 parents participated in focus groups. Eleven of the families represented live in Pitkin County, with others living throughout the Roaring Fork Valley, including Glenwood Springs, El Jebel, and Carbondale. Participants have children ranging in age from five months to 18 years. Of the participating families, 15 currently have licensed, center-based child care.

### SUMMARY

#### Location of care:

- *Parents were asked if they would prefer care close to their home or close to where they work, and parents were divided on this question.*
- *Parents who prefer care near home shared concerns with having children in the car for a long commute, wanting their children to be in care with the children they will go to elementary school with, and the desire to be close in case of an emergency.*
- *Parents who prefer care near work shared that it is easier to align work and care schedules, the ability to breastfeed when children are infants, and the desire to be close to their child during the day in case they need to pick them up in an emergency.*

#### Schedule:

- *Parents generally feel like the hours of care are shorter than what they need.*
- *Parents struggle to get to work on time with the current schedule at many providers.*
- *Some parents shared that they are not able to work because they couldn't find care that aligns with their schedule.*
- *Other parents expressed the need for flexible care that aligns with their work (i.e., not having to pay for care when they don't need it).*

#### Affordability:

- *Many parents shared that it is difficult for them to afford care, even when they are receiving assistance.*

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### **Availability:**

- *Parents experience an acute shortage of infant care. They do not have choices and are often on waitlists for years before securing a spot.*
- *Once children are 2.5, there are more choices available, and a lot of shuffling around occurs at this age.*
- *There is more of a need for care in Garfield County and western Eagle County than in Aspen.*

### **Making it work:**

- *Parents were asked how people are making it work when they do not have care. They shared:*
  - *stories of relatives moving to the area to help provide care;*
  - *a lot of families accepting whatever they can get, even when they know that children are not in a developmentally supportive environment;*
  - *families (or nannies) driving really long distances for whatever care they can find.*

### **Impacts:**

- *Parents shared perceptions that many families are moving out of the region or not having children because they can't afford to live in the area.*

### **Burlingame:**

- *Parents were asked about their perceptions of a child care center at Burlingame. There were differing opinions.*
- *Generally, everyone agreed that the location is probably only ideal for those who live in Burlingame. There were some concerns about increased traffic in the area and that people would have to drive their children the "wrong direction" before heading to work.*
- *Some parents shared that they see the need for spots, and families would probably use it because they are desperate for options, but locations in Garfield and western Eagle counties are more needed.*
- *There was generally support for the idea of a new center if it serves infants and toddlers, but there was concern about poaching teachers from existing programs.*
- *Some parents expressed a desire to see increased support for existing programs before considering the creation of new programs.*

### APPENDIX D: PROVIDER INTERVIEWS

#### Background

Nine interviews representing 11 centers in Pitkin County were conducted in May 2025. The purpose of these interviews was to understand the perspectives and observations of child care providers in Pitkin County to help inform data analysis and recommendations.

#### Summary

The themes below emerged through the conversations. These themes represent the perspectives of those interviewed.

#### Challenges of centers:

- *It is difficult to make it work financially.*
- *One of the biggest challenges to operating a center is teacher recruiting and retention. Many directors expressed that they have not been able to find qualified staff in the valley.*
- *Due to UPK, district preschools are “scooping up” kids, and they aren’t enrolled in community programs like they used to be.*
- *Several directors expressed frustration with the “strings” attached to Kids First funding and programs.*

#### Capacity:

- *Centers are generally operating at or near full capacity for infants and toddlers.*
- *Centers have struggled to keep preschool spots full - many families move to other programs in preschool.*

#### Waitlists:

- *Providers do not see waitlists as a valid measure of child care need in the valley.*
- *Most families are on several different waitlists.*
- *Some families that have care are on waitlists because they are seeking a different option or waiting for their preferred option.*
- *It seems like waitlists are getting smaller because people can’t afford to live in Aspen.*
- *Many families take the first thing that’s available to them and then stay on waitlists as they wait for their preferred location or preferred schedule.*

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### Observations of needs/challenges for families:

- *Families are seeking longer hours of care.*
- *Care is difficult to afford for many families, even with financial support.*
- *Parents often want their children to attend child care near where they will attend elementary school.*
- *There is a desperate need for infant care; when children are older, there are choices available.*

### Staff information:

- *Centers are generally providing a child care benefit for their employees through prioritized waitlists and/or reduced tuition.*
- *There is a split of staff - some live in Aspen, others live very far away (e.g., Silt, Parachute, etc.)*
- *When staff have children, they generally send them to care at the center where they work.*
- *Staff are more likely to stay if they have affordable housing.*
- *Staff can't afford to live near where they are working.*
- *Some staff do not have cars, and this can be a challenge for them.*

### Burlingame:

- *Several directors expressed concerns with opening a new center when existing centers are struggling to staff and fill their classrooms.*
- *We need infant and toddler care, don't need a new center that will take children ages 2.5 and up.*
- *The challenge of opening a new center will be finding staff - many directors are concerned about a new center poaching staff.*
- *Parents do not have many options, and some directors said, "the more care the better."*
- *There was probably more need when it was first conceived than there is now.*
- *The location is not convenient for anyone who doesn't live there.*
- *Flexible configuration would be important because demographics shift, and the center needs to be able to meet current needs.*
- *There are new centers in Glenwood, Carbondale, and Basalt.*



### APPENDIX E: COMMUNITY STAKEHOLDER INTERVIEWS

#### Background

Nine interviews were completed in March and April 2025. The purpose of these interviews was to help the consulting team understand the context for families and children in Pitkin County and the Roaring Fork Valley and to get some background on perspectives on child care to support survey development and data interpretation. Several questions were added or revised in the survey or noted as possible focus group questions in response to what was shared in these interviews.

#### Interviewees included:

- Aspen Community Foundation
- Aspen Chamber Resort Association
- Aspen Family Connections
- Early Childhood Network
- English in Action
- Morgan Fixel
- Pitkin County Human Services
- Roaring Fork School District Family Resource Center
- Valley Settlement

#### Summary

The themes below emerged through the conversations. These themes represent the perspectives of those interviewed and are intended to provide context to help understand the data gathered through the survey and focus group discussions. Statements are not intended to be considered facts and are presented as perspectives of community leaders and those who support families.

#### Perceptions of child care:

- *Child care in Pitkin County is perceived as very high quality.*
- *Current child care providers are dedicated veterans. There is a concern that there is not a new generation of providers ready to follow them when they retire or otherwise leave the industry.*
- *Child care programs have staff that are very well trained and provide developmentally appropriate, nurturing care for children.*

#### Families' varied child care needs:

- *Many community members have an assumption that Latine families are not interested in seeking center-based care, but others do not agree.*
- *Many families have a need for child care that extends beyond the schedules that are typical in center-based programs.*
- *There is a need for weekend and off-hours child care as well as summer programming.*
- *There have been some shifts in the need for child care following post-pandemic changes in work environments and commuting (e.g., parents who have a hybrid work schedule and are only commuting a few days a week).*
- *The most significant need for child care is for infants and toddlers.*
- *Families' choices for care are limited.*

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### Needs/challenges for families:

- *People are spending a lot of time commuting each day.*
- *Families are spread thin financially due to high housing and other costs of living.*
- *There is a perception that families are disconnected from one another and from the community, and this negatively impacts well-being and mental health.*

### Resources for families:

- *Families have more resources and support once they enter the public PK-12 system.*
- *The opportunity for outdoor and other recreation activities positively contributes to quality of life and is supportive of family thriving.*

### Other notes on child care:

- *There is a discrepancy when families say they are having trouble finding and accessing care, but programs are reporting that they have unfilled child care slots.*
- *Interviewees see that the community dialogue around child care has improved in recent years - those without children are beginning to understand why child care might be important to them.*

## APPENDIX F: EMPLOYER INTERVIEWS

### Background

Representatives from four major employers (Aspen Valley Health, Aspen Ski Company, Pitkin County, and Gould Construction) in the area were interviewed in May and June 2025. They were asked about their observations of employees' child care needs and how child care is impacting operations and economic development in the area.

### Summary

- Some employers interviewed offer or are considering offering child care benefits for employees, including dependent care Flexible Spending Account (FSA), on- or near-site child care, informal care networks for emergencies, and prioritized waitlists with community providers.
- Employers offer flexibility for scheduling and hybrid work to their employees to accommodate child care needs.
- Employees who work in positions that do not allow for scheduling or hybrid work flexibility (e.g., clinical staff, hospitality workers, etc.) have the most unmet child care needs.
- Employees are often unable to find extended, off-hours, or emergency care.
- Women are typically more impacted by child care challenges at work than men.
- Employers see that while housing is typically the primary challenge with recruiting or retaining employees, child care is often cited as a concern as well.
- Some employers have heard employees express that they are delaying or opting not to have children because of the challenges of living in the area.

## APPENDICES

### APPENDIX G: REFERENCES

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- <sup>3</sup> Colorado Department of Education. Grade Level Membership by LEA.
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