

# Child Care Keeps NH Working: **THE ECONOMIC IMPACT OF CHILD CARE IN THE CENTRAL NEW HAMPSHIRE REGION**



DEVELOPED BY:  
**The Central New Hampshire Regional Planning Commission**



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June 2005

Dear Colleagues:

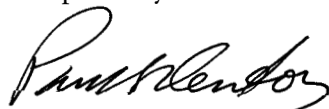
The Community Development Finance Authority (CDFA) is very pleased to share this report, *“Child Care Keeps NH Working: The Economic Impact of Child Care in the Central New Hampshire Region.”* The report is the first economic impact analysis of the child care industry undertaken in New Hampshire and the results are clear—the child care industry is critical to the region and the state’s economy. The business of child care contributes significantly to the region’s economy in many ways; the gross receipts generated from parental fees for service total \$21 million per year. The industry supports the earnings of families – collective wages of \$156 million in the Central NH Region alone, and by extension, helps to preserve jobs, revenues and spending generated by the child care industry by adding \$6.8 million to the gross regional product.

Child care services are a key ingredient to maintaining healthy communities in New Hampshire. The CDFA Board of Directors has long held the view that access to child care provides an educational and social system that is essential to the economic vitality of our communities. As with workforce housing, access to affordable child care is an important piece of the infrastructure that supports the region’s economic engine. CDFA’s funding of this report demonstrates commitment to collaborative efforts that can strengthen the capacity of individuals and community organizations to tackle tough issues. CDFA has taken an active role in bringing together community planners, members of Early Learning NH and others to strengthen early care and education in our state. Through the sponsorship of this study, CDFA was interested in quantifying the financial impact of the child care industry in traditional economic terms. The CDFA is pleased to have partnered with the Central New Hampshire Regional Planning Commission to complete this economic impact analysis, with a focus on the central New Hampshire region.

The conclusions of this study are confirmed by studies conducted by many other states and supported by economists on a national level—that well-focused investments in early childhood programs generate high public returns. We hope the study will be used as a tool to bridge the gap between community planning for child care services and economic development in other New Hampshire communities, and will help expand our definition of community economic development to include early care and education for our children.

And finally, my sincere thanks to the many individuals and organizations that made the production of this report possible. It is my hope that the recommendations put forth in this report will help to create local efforts designed to increase the industry’s capacity to respond to the changing child care needs of New Hampshire families.

Respectfully,



Paul Denton  
Executive Director  
Community Development Finance Authority

**“An Investment Partner In Community Development”**

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## EXECUTIVE SUMMARY

The purpose of this report is to provide a comprehensive analysis of the relationship between licensed child care and the Central New Hampshire economy, and to begin bridging the gap between economic development planning and child care investment. Policymakers, business leaders, economic development planners, transportation planners, and other community leaders stand to benefit from an increased dialogue regarding the connection between child care and a healthy economy.

Across the country, states and localities are using regional economic analyses to estimate the size of the early care and education sector and its linkage effects in the broader regional economy. To date, more than two-dozen studies have been completed (9 states and 21 counties) and more than a dozen additional studies are underway.

This report provides a wide range of compelling evidence to demonstrate that investments in the child care infrastructure have direct, positive effects on the ability of a local economy to experience growth and vitality. The report also argues that an intimate understanding of the interaction between child care supply and economic growth can improve the efficiency of investments in child care, and be more effective with private and public expenditures, both directly and indirectly.

This report looks solely at the impact of licensed child care in the Central New Hampshire Region. Licensed child care is an inclusive phrase to mean all types of education and care for children from birth through age five, and programs for school-age children before and after school and during school vacations, which is licensed by the state and is beyond the care provided by parent/guardian.

The following are the key findings of this report.

- In July 2004, the Central NH Region had 96 licensed child care providers.
  - Center-based child care, of which there are 74 in the Central NH Region.
  - Family-based child care, of which there are 22 in the Central NH Region.
- In July 2004, the licensed capacity of all licensed providers in the Central NH Region was 4,083 children.
- In the Central NH Region, there are 2,695 parents that are using licensed child care providers for the care of their children, ages 0-13, while working.

- The gross receipts generated from parental fees for service from licensed providers is \$418,282 per week or \$21,750,666 per year.
- Employment in licensed child care is estimated to be between 404-416 people (FTE). This figure is roughly comparable to employment in “Machinery and Supply Wholesalers, and Hardware, and Plumbing Wholesalers<sup>1</sup>” combined.
- Total wages paid to child care workers in licensed facilities is estimated to be between \$6,468,000-\$6,478,948 annually, which is more than what was paid in wages (\$6,336,545) to those in “Personal and Laundry services<sup>2</sup>”.
- The collective wages earned by working parents using licensed child care in the Central NH Region is \$156,199,505 annually.
- By applying their purchasing power in other sectors, licensed child care providers impacted the regional economy by \$6.2 million in wages and 108 jobs in other industries in secondary effects. This is similar to wages in “Fabricated Structural Metal Products<sup>3</sup>” industry (\$6.5 million in wages) and employment in “Blast Furnace and Basic Steel Products<sup>4</sup>” (103 jobs) industry in Merrimack County.
- The child care industry in the Central NH Region added \$6.8 million to the gross regional product. This is slightly more than “Other Transportation<sup>5</sup>” industry (\$6.7 million in 2004) in Merrimack County.

## INTRODUCTION

Here in the Central New Hampshire Region<sup>6</sup>, a healthy economy requires strong businesses and productive workers. Child care not only fuels that strength, it is an industry that provides positive, short-term returns. The child care industry represents a growing economic sector that state and local governments, as well as businesses, need to support and encourage to develop.

Licensed child care is an inclusive term to mean all types of education and care for children from birth through age five, and programs for school-age children before and after school and during school vacations, which are beyond the care provided by parent/guardian. The results of the study are not delineated by age, nor do they include unlicensed providers, as determined by the New Hampshire Bureau of Child Care Licensing, who are serving children in the Central NH Region.

To date there has been little information linking child care resources to the economy. This report hopes to fill that gap by providing documentation of the relationship between the insufficient supply of reliable, affordable, accessible, quality child care and the health of the economy here in Central New Hampshire. It is clear that issues surrounding child care belong to all players on the economic stage, not just to individual working parents.

The economic importance of early care and education has three components: its effect on place (the regional economy), its effect on parents (social infrastructure supporting workers and their employers), and its effects on children (investing in human development and education for the future workforce). The educational impact on children has been the primary focus of most child care policy to date.

The report that follows highlights how investments in the child care infrastructure, like investments in the infrastructure of transportation, public works, housing, and higher education, can have direct, positive effects on the ability of Central New Hampshire's economy to experience growth and vitality.

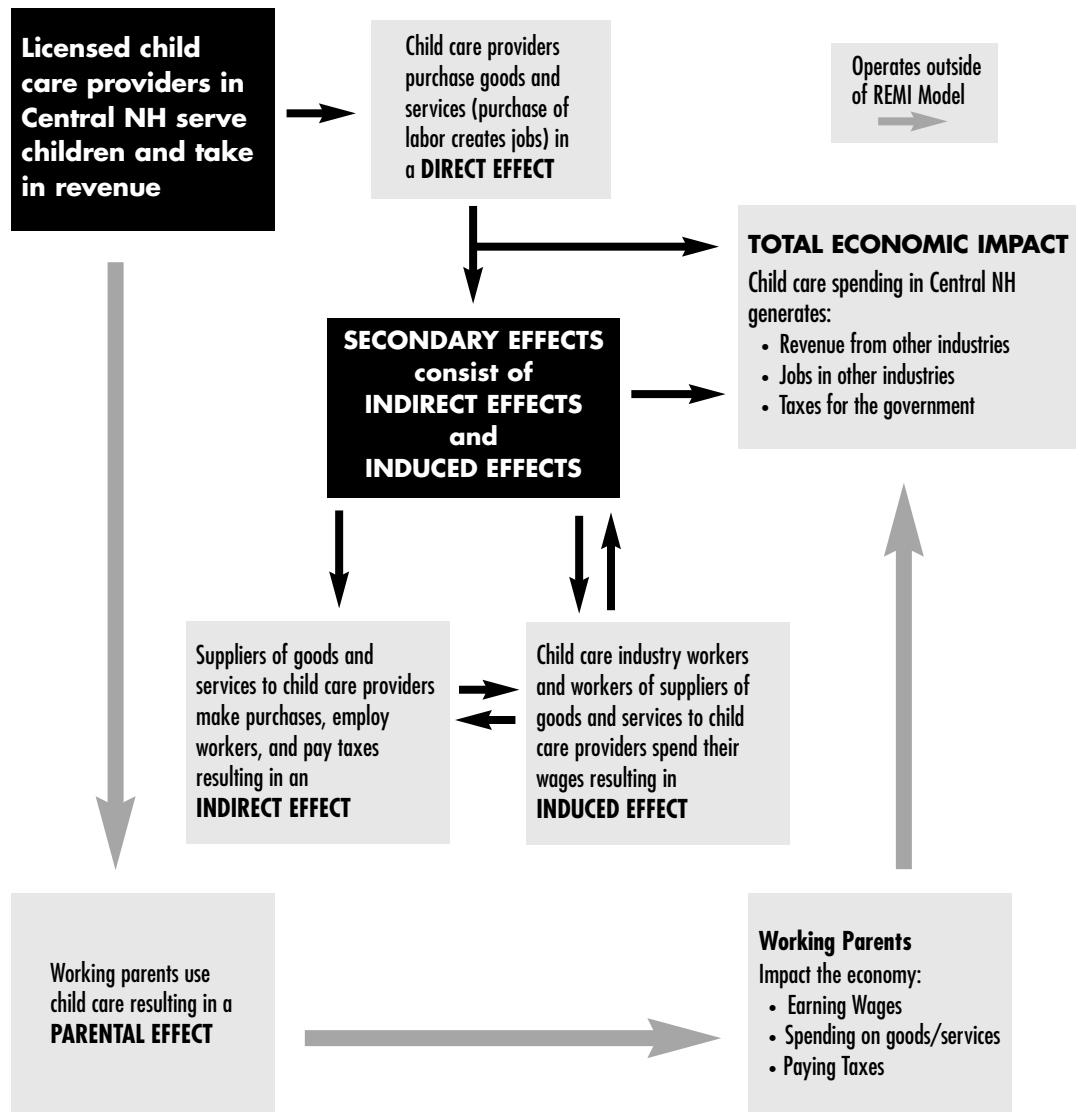
This report is the first step in integrating child care planning into local, regional, and state economic development plans. It calls for economic developers, business people, planners, and public officials to collaborate with child care specialists so that sound decisions can be made to strengthen the economy and well-being of the children here in Central New Hampshire.



## COUNTING ECONOMIC IMPACT

The economic impact of an industry is assessed by examining the revenues generated by that sector of the economy (direct effects), as well as the goods purchased, taxes paid, and jobs created within other industries affected by that sector (secondary effects).

Additionally, the child care industry provides an essential service that enables parents to work in other industries. Working parents wages and economic contributions comprise an additional secondary or “Parental Effect” that enhances the economic role of child care as a vital part of the infrastructure in an economic development strategy.



## **CENTRAL NEW HAMPSHIRE'S CHILD CARE INDUSTRY**

The child care industry in the Central New Hampshire Region represents a large and growing economic sector. Measuring the size of the child care sector includes accounting for the number of businesses (establishments), number of employees, children served, and sales (gross receipts).

### **State of New Hampshire Licensing**

The NH Bureau of Child Care Licensing (BCCL) ensures that children attending child care programs are in safe and healthy environments and are provided with care, supervision and developmentally appropriate activities that meet each child's physical and emotional needs.

BCCL accomplishes this through on-site evaluations, monitoring, and investigations that ensure compliance with applicable NH Statutes and Administrative Rules, approval and issuance of licenses, and initiation of appropriate disciplinary action when necessary for compliance and the protection of children.

BCCL also provides consultation and technical assistance to help understand licensing regulations to existing licensed child care providers and persons who might consider applying for a child care program license.

In July 2004, the Central NH Region had 96 licensed child care providers, a list of which can be seen in **Appendix A**<sup>7</sup>.

A child care provider who operates in a private home is not required to have a license if the number of children cared for includes no more than 3 additional children, other than the provider's own children, or if the provider cares for only her/his own, related or resident children. These type of providers are called license-exempt providers and are not included in the analysis in this report.

### **Types of Licensed Providers**

There are many different types of licensed child care providers. Child care providers fall into two broad groups:

- Center-based child care, of which there are 74 in the Central NH Region.
- Family-based child care, of which there are 22 in the Central NH Region.

Programs can also be grouped into two categories by the hours they keep:

- Full-time child care (65 in the Central NH Region), which care for children for 6 or more hours a day, five days a week or more.
- Part-time child care (31 in the Central NH Region), which care for children less than 6 hours a day or for fewer than five days a week.

There are seven types of licensed child care programs, as defined by the state, which are described in detail in **Appendix B**. The state allows a child care provider to become licensed for more than one type of program, which is why the numbers below do not add up to the total number of providers in the region. All of these programs are either for-profit or non-profit, as well as full-time or part-time.

#### ***Family Child Care Home***

There are 14 licensed family child care homes in the Central NH Region that can each care for up to 9 children at one time.

#### ***Family Group Child Care Home***

There are 8 licensed family group child care homes in the Central NH Region that can each care for up to 17 children at one time.

#### ***Group Child Care Center***

There are 33 licensed group child care centers in the Central NH Region that are providing care for preschool and school age children.

#### ***Child Care Nursery***

There are 30 licensed child care nursery centers in the Central NH Region solely providing care for children under the age of 3 years old.

#### ***Preschool Program***

There are 37 licensed preschool programs in the Central NH Region that are providing care for children over the age of 3 years old.

#### ***School Age Program***

There are 49 licensed school age programs in the Central NH Region that are providing care before or after, or before and after regular school hours.

#### ***Night Care Program***

There is 1 licensed night care program in the Central NH Region providing child care during the evening or night time hours.

## **Age of Children Being Served By Child Care**

Currently there are five different age groups that are cared for by child care providers in the Central New Hampshire Region, which are defined below. Each of these age groups requires a specific kind of care, which sometimes determines the price of the child care services provided. A provider can provide care for more than one age group, which is why the total number of providers listed for each group does not add up to the total number of providers in the Central NH Region.

### ***Infants***

Infants are defined as those children within the ages of 6 weeks to 12 months. There are currently 38 establishments that care for infants in the Central New Hampshire Region.

### ***Toddlers***

Toddlers are defined as those children within the ages of 13-35 months. In the Central New Hampshire Region there are 58 establishments that provide care for toddlers.

### ***Preschool***

Preschool aged children are those children 3-4 years old. Currently there are 75 establishments within the Central New Hampshire Region that provide child care to preschoolers.

### ***Kindergarten***

Kindergarten aged children are those children 5 years old. For kindergarten aged children there are a total of 85 private programs (not run by school districts) that provide these child care services.

### ***School-age***

School-aged children are those children 6-13 years old. Child care may be provided to those children older than 13, but typically child care ends at age 13. Currently there are 73 establishments that provide care for children within this age group.

## Capacity of Licensed Providers

In July 2004, the licensed capacity of all licensed providers in the Central NH Region was 4,083 children<sup>8</sup>. This number is an estimate of the total number of children being served in this region because the licensed capacity is just that, the maximum number of children that the provider can care for at any one time. However, many providers are not always at their licensed capacity due to a variety of factors, including staff shortages, school vacations, and space limitations.

Since counting the number of children enrolled in licensed child care in the Central NH Region is not feasible, this report relies on the licensed capacity for each provider as a good estimate of the number of children they are serving. According to the 2001 NH Child Care and Early Education Market Rate Survey, of those programs surveyed, there was only a slight decrease in enrollment numbers as compared to licensed numbers (1 child less per average).



Photographer: Geoff Forester, Concord, NH

Courtesy of: N.H. Community Loan Fund

*“I am convinced that targeted investments in early care and education yield strong public returns with concrete economic and educational benefit.”*

Kathy Bogle Shields  
Vice President for Community Development  
Providian Financial

## REGIONAL ECONOMIC LINKAGES

Child care's importance as an economic sector stems not only from its direct employment and output in the regional economy, but also from its linkages to other industries. From a regional economic standpoint, the most important measure of a sector's economic importance is the size of employment and output. However, the regional economic impact of a sector involves more than simply its size; each industry also has a linkage effect in the broader regional economy. The regional economy is composed of many industries that buy and sell from each other. These inter-industry purchases can be measured to show the relative strength of inter-industry linkages for each industry in the regional economy. Child care businesses and employees purchase goods and services that stimulate economic activity in other industries. Economic impact analyses makes it possible to estimate the dollar value of these linkages.

### Input-Output Analysis

Input-output models are based on the assumption that export demand (or the ability of industries to sell to the external economy) is the engine that generates activity in the regional economy. Changes in direct effects infuse local industries with new funds, which increase output and employment.

The explanation of the Input-Output Analysis results can be found in **Appendix F**.

### **Direct Effects**

Direct effects result from the revenues taken in by the child care industry. They include the creation of new jobs in the child care industry and the purchase of goods and services by the child care industry.

### **Secondary Effects**

Secondary effects are changes in economic activity resulting from subsequent rounds of re-spending and circulating of dollars in the economy as a result of and following from the direct effects. There are two types of secondary linkage effects that an input-output analysis measures, indirect and induced effects.

*Indirect Effects:* Indirect effects count the multiple rounds of inter-industry purchases spurred by child care industry spending. The direct effect of the purchase of goods and services by child care businesses, in turn, stimulates the indirect effects of job creation and purchases of goods and services by other industries.

*Induced Effects:* Induced effects capture the impact of household spending. Employees spend their wages in the larger economy and these expenditures generate demand in other industry sectors such as housing, groceries, and entertainment.

## DIRECT EFFECTS

### Gross Receipts

Gross receipts is a measure of the size of the industry in terms of the overall value of the goods and services produced by that industry over the course of a given year. For child care services, gross receipts are equal to the total amount of dollars flowing into the sector in the form of payments for care from parent fees and private and public subsidies.

In this report, market rates were used to calculate gross receipts with the assumption that these numbers were inclusive of direct child care subsidy money. Every two years the state conducts a survey of child care providers to gather information on market rates across the state. The figures below were derived from the 2001 Market Rate Survey and represent the mean fee (statewide) for licensed child care. The fees represent what is charged to the parents but do not account for other forms of subsidies, nor does the fee necessarily cover the true cost of care that is provided.

#### **Market Rate Fee for Service<sup>9</sup>**

Infant Care (Birth-12 mo.) . . . . .	\$140.77/wk average
Toddler Care (13-24 mo.) . . . . .	\$131.59/wk average
Younger Preschooler Aged Care (25-35 mo.) . . . . .	\$128.30/wk average
Older Preschool Aged Care (36-59 mo.) . . . . .	\$120.51/wk average
Children (5-6 years) . . . . .	\$117.96/wk average
School age (6-17 years) . . . . .	\$65/wk average

Using the 4,083 licensed capacity for child care providers in the Central NH Region, the gross receipts generated from parental fees for service for these providers is \$418,282 per week or \$21,750,666 per year. See **Appendix C** for more information on how gross receipts were calculated.

## **Licensed Provider Employment**

The number of employees is a critical measure of the size of the child care sector. Two methodologies were used to estimate the number of employees in licensed child care.

### ***Methodology 1***

The first calculation used Covered Employment Data<sup>10</sup>, which showed that jobs in the Child Day Care Services Industry (NAICS 6244) in the Central NH Region numbered 416 employees in 2002. This figure is roughly comparable to employment in “Machinery and Supply Wholesalers, and Hardware, and Plumbing Wholesalers<sup>11</sup>” combined.

### ***Methodology 2***

The second methodology used a conservative estimate of Full-Time Employees (FTE’s) derived from calculating the state licensing staff requirements for the total number of children in licensed care by type of care. This methodology shows that licensed child care providers in the Central NH Region employed an estimated 404 staff in 2004. The formula used for the second calculation and the calculations themselves can be found in **Appendix D**.

The total number of people working in the child care industry is likely higher because so many child care professionals work part-time. In addition, the estimate is based on minimum staff to child ratios required by state law. Some child care providers choose to maintain higher ratios in order to improve program quality.

The first methodology is advantageous because it is an actual count of those employees by their employers. However, the first methodology contains data from 2002 and does not include sole proprietorships in the employment count. The second methodology is based on actual licensed providers in 2004 and state licensing requirements. However, the second methodology uses minimum staff licensing standards, which many providers exceed, and count full-time equivalent, not the actual number of staff.



## **Wages of Licensed Provider Employees**

Knowing the wages of licensed provider employees is important because of the interconnection between direct and secondary impacts. The figures listed below are simply the wages paid to child care workers and do not include payroll taxes or benefits. If payroll taxes and benefits were to be included into the calculations, it is estimated that the figures would be approximately 15% higher.

### **Methodology 1**

In 2002, based on Covered Employment data<sup>12</sup>, total wages paid in Child Day Care Services in the Central NH Region were approximately \$6,468,000, which is more than what was paid in wages (\$6,336,545) to those in “Personal and Laundry services<sup>13</sup>”.

### **Methodology 2**

In 2004, licensed child care providers employed approximately 404 full-time staff, each earning an average of \$7.71 per hour or \$16,037<sup>14</sup> annually. Based on the total number of licensed child care providers and staff, this amounts to an approximate total of \$6,478,948 in wages paid to licensed child care providers in the Central NH Region.

The first methodology is advantageous because it provides the actual wages of those child care employees. However, the first methodology contains data from 2002 and does not include the wages of those sole proprietors. The second methodology is based on actual licensed providers in 2004 and average child care wages. However, the second methodology uses an average wage from 2002 that is applied equally to all employees, regardless of experience or if the employee is the owner.

## SECONDARY EFFECTS

Secondary effects are changes in economic activity resulting from subsequent rounds of re-spending and circulating of dollars in the economy as a result of and following from the direct effects (gross receipts and employment).

As purchases of goods and services by child care providers percolated through the regional economy in 2004, \$6.2 million in wages and 108 jobs were generated in other industries in secondary effects. This is similar to wages in “Fabricated Structural Metal Products<sup>15</sup>” industry (\$6.5 million in wages) and employment in “Blast Furnace and Basic Steel Products<sup>16</sup>” (103 jobs) industry in Merrimack County.

In 2004, the child care industry in the Central NH Region added \$6.8 million to the gross regional product<sup>17</sup>. This is slightly more than “Other Transportation<sup>18</sup>” industry (\$6.7 million in 2004) in Merrimack County.



Photographer: Goeff Forester, Concord, NH

Courtesy of: N.H. Community Loan Fund

*“This report clearly demonstrates the critical role that child care plays in supporting working parents and young children. It is essential that elected officials, employers and community leaders recognize this fact and partner with child care providers so that all children can benefit from having access to high quality child care programs in central New Hampshire.”*

Stefany A. Shaheen  
Executive Director  
Early Learning NH

## LICENSED CHILD CARE'S IMPACT ON PARENTS

### Estimated Number of Working Parents with Children in Licensed Child Care

There is no national, state, or regional data source that measures the number of parents with children in paid care. The methodology used here, which is further explained in detail in **Appendix G**, uses US Census data on children under age 6 and children age 6-13, by employment status of parents, to develop a conservative estimate of the ratio of working parents per child.

We define working parents needing child care as single parents that work and dual-parent families with both parents working. We assumed that dual-parent families with only one parent working would not demand child care.

In the Central NH Region, there are 2,695 parents that are using licensed child care providers for the care of their children, ages 0-13, while working.

### Wages of Parents Whose Children are in Licensed Child Care

Parental income provides a reasonable estimate of purchasing power and can be roughly calculated by multiplying the number of working parents with children in licensed child care by the median income for the Central NH Region.

In the Central NH Region, there are 2,695 parents that use licensed child care while working. The median family income for the Central NH Region is \$57,959 (2000 Census). Thus, the collective wages earned by working parents using licensed child care in the Central NH Region is \$156,199,505 annually.

## CHILD CARE AND ECONOMIC DEVELOPMENT

A healthy economy requires strong businesses and productive workers. Child care not only fuels that strength, it is an industry that provides positive, short-term returns. As this regional economic analysis has shown, child care is a sector comprised of numerous small businesses, which employ hundreds of workers, and serve thousands of children. Not only is the sector important economically in its own right, it is also a critical component of the social infrastructure that supports parent workers and their employers.

Economic Development refers to public and private activities designed to attract, expand, retain, or establish business in state and local economies. New definitions of economic development emphasize more than jobs and income; they recognize the importance of investments in human capital, quality of life and sustainability. Economic investments focused on the child care sector achieve all of these goals.

Child care is a business with significant impacts on economic development. According to the New Hampshire Employment Projections (2004)<sup>19</sup>, by 2012 there will be 4,535 child care workers in New Hampshire, up from 3,105 workers in 2000. The child care worker sector will have annual job openings of 175 employees.

By broadening the scope of child care to include economic development, we broaden the framing of economic development policy as well. When child care is recognized as part of the economic development infrastructure, it opens the way for more sustainable economic development policies focused on improving quality of life and social infrastructure in communities. Like other components of a strong economic infrastructure, the child care industry supports businesses by increasing productivity. Quality transportation systems and affordable housing enable workers to get to their jobs and make areas attractive places to live and work. Similarly, quality, stable, and accessible child care supports businesses. A strong child care infrastructure:

1. Increases employee retention and labor force participation, which, in turn, lowers turnover costs and ensures a healthy labor market.
2. Enhances recruitment of new employees and attracts a skilled workforce to the area.
3. Reduces absenteeism in existing employees, which increases productivity.
4. Ensuring a more stable, well-educated future workforce by better preparing young children to succeed in school.

These effects have a direct impact on the bottom line for businesses of all sizes and for the Central NH economy as a whole.

Investing in child care infrastructure in the Central NH Region will have direct economic benefits for the regions economic competitiveness. Like transportation, education, public works, and affordable housing, child care is a necessary and vital part of the economic infrastructure. Investments in the child care sector support families, businesses, and society as a whole.

### ***Increasing Employee Retention***

Retention of existing employees is critical to a company's economic success, particularly in establishments relying on a skilled workforce. Employees who feel supported in these new family roles and/or who feel that their workplaces support a balance between work and home obligations are less likely to leave their jobs, either for another, more family-friendly company or to stay at home with children. When employees leave because of child care problems or transfer to a company with better child care benefits, companies lose human capital and incur high turnover costs.

### ***Enhancing Recruitment***

The accessibility of quality, affordable child care on-site or in the community is a strong recruitment tool. The availability of child care is necessary to attract employees to the area who do not have nearby family and friends. In addition to directly benefiting some employees, strong work-life benefits also indicate positive, family-friendly values of a company, which make the company more attractive in a competitive workforce market.

### ***Reducing Absenteeism***

The absence of reliable child care is a barrier for many employees in the workforce. New Hampshire businesses loose between \$12 to \$24 million a year because of child care related absenteeism<sup>20</sup>. In 2000, a survey conducted by the NH Economic and Labor Market Information Bureau reported that 50% of the companies responding to the survey indicated they lost full-time employee hours because of child care issues. In that survey, 41% also indicated that their company had lost employee hours as a result of part-time employee child care issues<sup>21</sup>.

### ***Ensuring Future Workforce***

Knowing that NH needs an educated workforce to continue to grow the economic sector, investing in child care yields positive results. The contributions the child makes to society as an adult can be traced back to the first few years of life. If this period of life includes support for growth in cognition, language, motor skills, adaptive skills, and social-emotional functioning, the child is more likely to succeed in school and later contribute to society. The return on investment from early childhood development, through quality child care, results in better working public schools, more educated workers, and less crime.<sup>22</sup>

## RECOMMENDATIONS

The Central NH Region's child care industry is critical to the region's economic vitality and quality of life. In addition to directly contributing approximately \$6.4 million in wages and 416 jobs annually to the economy Child Care Services support \$6.2 million in wages and 108 jobs in other industries through secondary effects. The area's licensed child care industry enables parents to earn \$156,199,505 each year, sustaining the output and overall productivity of the economy.

The child care industry alone is unable to make the investments necessary to meet the growing need for care. The federal, state, and local governments, local business associations, and both large and small businesses must all play a larger role in ensuring there is enough child care to sustain economic growth.

Incorporating child care into economic development planning and investment will take concerted time and effort on the part of child care advocates and local leaders. While each region and community faces unique obstacles to the effective delivery of child care services, a number of common strategies have proven effective in more deeply integrating child care with the economic development planning process. The following are strategies that should be considered to strengthen the child care infrastructure in the Central NH Region.

### **1. Provide benefits to workers needing child care.**

Employers can offer benefits that save businesses money by lowering turnover and absenteeism, which reduces training dollars and turnover costs.

Benefits can include:

- Non-taxable Flexible Spending Accounts (FSAs)
- Flexible scheduling policies
- Resource and referral services to help parents find accessible, affordable, quality care
- Back-up care programs to help when regular arrangements fall through
- Parental leave programs for new parents
- Payment assistance for child care costs
- Reserving child care slots for employees with local child care providers

### **2. Integrate child care into economic development planning.**

Comprehensive plans and other long-range economic development plans managed by the state, region, and local municipalities should consider how child care fits into future economic and community development.

**3. Create tax benefits for employers that provide on-site child care, contract with an off-site facility, or offer employee benefits (matching funds).**

One approach to address the child care needs of families is to provide tax credits for employers that provide some form of child care assistance to their employees. These credits permit an employer to offset part of its child care expenditures against its state tax liability. In effect, the credits result in the government's sharing the costs of providing child care benefits with employers. The credits are generally structured as a given percentage of eligible expenses, often with a limit placed on the amount that can be claimed.

**4. Establish business partnerships with child care.**

Becoming a partner in strengthening the child care infrastructure ensures that child care exists not only for employees, but for the community as well. Working with government representatives and Chambers of Commerce to get child care issues on the policy agenda enables the needs of businesses to integrate with the needs of governments, the community, the child care industry, and other key stakeholders.

**5. Offer access to small business incentives/program to assist child care providers with facility development and operating costs.**

Collaborate with the Small Business Development Corporations, the Small Business Administration, NH Community Loan Fund, and Early Learning NH to access economic development incentives geared to small businesses – loans, business management training, and support – that could assist child care providers with upgrading facilities and reducing operating costs.

**6. Reduce land use and zoning barriers to child care facility development.**

Land use and zoning requirements can be prohibitively restrictive or expensive for child care providers seeking to establish or expand their business. Streamlining the permit review process, reducing permit application fees, and ensuring that child care facilities are allowable in all appropriate zoning districts can be critical to reducing barriers to the development and maintenance of child care facilities.

**7. Ensure that all available federal and state funding to support affordable child care is leveraged.**

State and federal funding is critical to working families who could not participate in the workforce without help paying for child care. However, many families do not participate in these programs because they are unaware of them or reluctant to ask for assistance.

**8. Support the child care workforce.**

Promote education, recruitment, retention, and wage compensation programs to help reduce provider turnover and improve quality of care. Some methods can include scholarship programs to improve educational standards and wage and benefits supplement initiatives.

**9. Develop economies of scale.**

Enabling small child care businesses to reach some economies of scale could help these businesses operate more efficiently and bring some stability to an industry that is often economically fragile. Mechanisms used in other industries to streamline billing, marketing, and purchasing might help strengthen cash flow and reduce overhead. Helping child care programs spend less time on back-office tasks and more time delivering quality care, while maintaining the diversity of providers and parent choice in the market, is an important step.

**10. Create user-friendly and accessible information on state licensing requirements and guidelines.**

Work with public and private entities to ensure that all information on state licensing requirements is easy to understand and is accessible to those wanting to open a new child care businesses.

**11. Ensure that user-friendly and accessible information on licensed child care providers is available for parents, businesses, constituents, and other stakeholders.**

Businesses looking to relocate, expand, or recruit new workers to New Hampshire should be able to easily find accurate information on licensed child care providers. The best way to disseminate this information would be to have a searchable web-based database for business, parents, and other constituents to use.

**12. Use existing municipal and state-owned facilities for child care programs.**

Municipal and state governments own many buildings throughout the region that are underutilized during certain times of the day or during certain times of the year. By making this underutilized space available to child care providers for little or no cost, the government can help support the child care infrastructure and thus promote economic development.



## CONCLUSION

Strengthening employment and economic development is a concern of businesses and community leaders throughout our nation, and a goal that is clearly understood by the American public. Making the case for child care in these terms can help broaden support for the industry. Though parents and providers are traditionally considered the primary beneficiaries of child care policy, an economic development frame extends the beneficiaries to include employers, local governments, and economic developers.

An adequate supply of reliable, quality, affordable, and accessible child care is essential for Central NH's economy. Parents who can't find adequate child care, can't afford adequate child care, or can't rely on child care arrangements are less likely to enter the workforce, be productive at work, and remain employed. Substandard child care puts children at risk for injury, but perhaps more importantly these children risk never reaching their full potential and later risk falling through the cracks of a public school system ill-equipped to handle first graders who are not ready learners. These problems are particularly acute for parents working in the retail and services industries, which are defined by lower wages and non-traditional, mixed, or weekend shifts.

As the number of two-wage-earner families and women-headed households has increased, child care has become an essential social infrastructure, enabling parents to enter and remain in the workforce. Reliable, affordable, quality child care is critical to low-income families entering the workforce as a result of welfare reform and may make the difference between climbing out of poverty and falling deeper into it.

The child care industry is a growing part of the Central NH economy – pumping money into the local communities by supporting working families and creating jobs. Money spent on child care stays in local communities, helping children, families, and local businesses.

APPENDIX A 2003 LICENSED CHILD CARE PROVIDERS IN THE CENTRAL NEW HAMPSHIRE REGION

Location	Name	Program Type	Full Time	Part Time	Infant	Toddler	Pre-school	Kindergarten	School Age	Total # of Children (Licensed Capacity)	Hours
Allenstown	Concord Family YMCA at Allenstown Middle School	School Age		Yes					Yes	45	2:30pm 5:30pm
Allenstown	Peace of Mind After School	School Age		Yes				Yes	Yes	45	2:30pm 5:30pm
Allenstown	School St. Kindergarten and Daycare Center	Pre-School, School Age	Yes			Yes	Yes	Yes	Yes	20	6:00am 5:30pm
Allenstown	Tender Years Child Care and Pre-School	Pre-School, School Age	Yes		Yes	Yes	Yes	Yes	Yes	74	6:30am 5:30pm
Boscawen	Best at Boscawen Elementary	School Age		Yes					Yes	45	2:30pm 5:30pm
Boscawen	Concord Family YMCA SAP at Boscawen Elementary School	School Age		Yes					Yes	45	2:30pm 5:30pm
Boscawen	Merrimack Valley Day Care Service @MCNH	Child Care Nursery, Group Child Care Center	Yes		Yes	Yes	Yes	Yes		45	6:30am 5:30pm
Bow	Bow Kids Inc	School Age		Yes				Yes	Yes	75	2:30pm 5:30pm
Bow	Bow Montessori	Family Group Child Care	Yes			Yes	Yes	Yes	Yes	12	7:30am 5:30pm
Bow	Celebrating Children	Pre-School		Yes			Yes	Yes		31	9:00am 11:30am
Bow	Joyful Noise Learning Center	Group Child Care Center, Child Care Nursery, Pre-School, School Age		Yes		Yes	Yes	Yes	Yes	24	8:30am 11:30am
Bow	Rockwood Acres Family Day Care	Group Child Care Center, Child Care Nursery, School Age	Yes			Yes	Yes	Yes	Yes	24	7:30am 5:30pm
Bradford	Kearsarge Area Pre-School	Group Child Care Center, Pre-School	Yes			Yes	Yes	Yes		18	7:00am 6:00pm
Bradford	Live Wire Before and After School	School Age		Yes				Yes	Yes	45	2:30pm 5:30pm
Bradford	Marge's Child Care	Family Child Care	Yes		Yes	Yes	Yes	Yes	Yes	9	7:00am 6:00pm

Location	Name	Program Type	Full Time	Part Time	Infant	Toddler	Pre-school	Kindergarten	School Age	Total # of Children (Licensed Capacity)	Hours
Canterbury	Canterbury Daycare Center	Group Child Care Center, Child Care Nursery, School Age	Yes			Yes	Yes	Yes	Yes	24	7:00am 5:30pm
Chichester	Kelly Corner School	Group Child Care Center, Pre-School	Yes				Yes	Yes		24	8:30am 3:00pm
Chichester	Kozy Kitten Korner	Family Group Child Care	Yes		Yes	Yes	Yes	Yes	Yes	12	6:30am 6:00pm
Chichester	YMCA SAP @ Chichester Central	School Age		Yes				Yes	Yes	45	3:00pm 5:45pm
Concord	After School - Kimball	School Age		Yes				Yes	Yes	60	2:30pm 5:30pm
Concord	After School - Beaver	School Age		Yes				Yes	Yes	60	2:30pm 5:30pm
Concord	After School - Conant	School Age		Yes				Yes	Yes	60	2:30pm 5:30pm
Concord	After School - Broken Ground	School Age		Yes				Yes	Yes	90	2:30pm 5:30pm
Concord	Concord Family YMCA	Group Child Care Center, Child Care Nursery, Pre-School, School Age	Yes			Yes	Yes	Yes	Yes	232	6:45am 6:00pm
Concord	Concord Headstart and Child Care	Group Child Care Center, Child Care Nursery, Pre-School, School Age	Yes		Yes	Yes	Yes	Yes	Yes	64	6:30am 5:30pm
Concord	East Concord Cooperative Pre-School	Pre-School		Yes		Yes	Yes	Yes		18	
Concord	East Side Learning Center	Group Child Care Center, Child Care Nursery, Pre-School, School Age	Yes			Yes	Yes	Yes	Yes	135	6:30am 5:30pm
Concord	Emerson School for Pre-Schoolers	Center Based Child Care, Pre-School		Yes			Yes	Yes		22	8:45am 11:15am
Concord	First Start Children's Day Care	Group Child Care Center, Child Care Nursery, School Age	Yes		Yes	Yes	Yes	Yes	Yes	150	6:45am 5:30pm
Concord	Girls Inc. of New Hampshire at Concord	School Age		Yes				Yes	Yes	75	2:30pm 5:30pm

Location	Name	Program Type	Full Time	Part Time	Infant	Toddler	Pre-school	Kindergarten	School Age	Total # of Children (Licensed Capacity)	Hours
Concord	Grammy's Safe Harbor	Family Child Care	Yes			Yes	Yes	Yes	Yes	6	6:30am 5:30pm
Concord	Green Gables Family DC	Family Group Child Care	Yes			Yes	Yes	Yes	Yes	12	7:15am 5:00pm
Concord	Immaculate Heart of Mary Children's Center	Group Child Care Center, Child Care Nursery, Pre-School, School Age	Yes		Yes	Yes	Yes	Yes	Yes	89	7:00am 5:30pm
Concord	Learning Center at Concord Hospital (Employee Only)	Center Based Child Care, Child care nursery, School Age	Yes		Yes	Yes	Yes	Yes	Yes	121	6:45am 5:15pm
Concord	Little Saints Christian School	Pre-School, School Age	Yes							18	8:00am 5:30pm
Concord	Mary Heine FCC	Family Child Care	Yes		Yes	Yes	Yes	Yes	Yes	6	7:30am 5:30pm
Concord	Mary's Little People	Group Child Care Center, Child Care Nursery	Yes		Yes	Yes	Yes	Yes	Yes	35	7:00am 5:30pm
Concord	Merrimack Valley DC	Group Child Care Center, Child Care Nursery, School Age	Yes		Yes	Yes	Yes	Yes		80	6:45am 5:30pm
Concord	Merrimack Valley Day Care at Eagles Bluff	Group Child Care Center, Child Care Nursery, School Age	Yes			Yes	Yes		Yes	44	6:45am 5:30pm
Concord	Merrimack Valley DC-NH Hospital	Group Child Care Center, Child Care Nursery, School Age	Yes			Yes	Yes			35	6:30am 5:00pm
Concord	Montessori Children's Center of Concord	Group Child Care Center, Pre-School	Yes				Yes	Yes		21	8:30am 3:00pm
Concord	Nancy's Day Care	Family Child Care	Yes			Yes	Yes	Yes	Yes	6	6:45am 5:30pm
Concord	Presidential Oaks (Employee Only)	Group Child Care Center, Child Care Nursery, Pre-School, School Age	Yes		Yes	Yes	Yes	Yes	Yes	25	6:15am 11:15pm
Concord	NHTI Child & Family Development Center	Child Care Nursery, Pre-School	Yes		Yes	Yes	Yes	Yes		50	7:00am 5:30pm

Location	Name	Program Type	Full Time	Part Time	Infant	Toddler	Pre-school	Kindergarten	School Age	Total # of Children (Licensed Capacity)	Hours
Concord	Step Ahead Learning Center	Group Child Care Center, Child Care Nursery, Pre-School		Yes		Yes	Yes	Yes		70	8:00am 12:00pm
Concord	Sweet Dreams Day Care	Family Group Child Care	Yes		Yes	Yes	Yes	Yes	Yes	12	7:30am 5:00pm
Concord	The Children's Learning Center at St. Paul's School (Employee Only)	Child Care Nursery, Pre-School, School Age	Yes		Yes	Yes	Yes	Yes	Yes	75	
Concord	The Early Enrichment Center	Group Child Care Center, Child Care Nursery, Pre-School	Yes		Yes	Yes	Yes	Yes	Yes	65	7:30am 5:30pm
Concord	Tiny Tots Funspot	Group Child Care Center	Yes		Yes	Yes	Yes	Yes	Yes	15	6:30am 5:30pm
Concord	Weezle's House	Family Child Care	Yes		Yes	Yes	Yes	Yes	Yes	6	7:00am 6:00pm
Concord	Woodside School	Group Child Care Center, Child Care Nursery, Pre-School, School Age	Yes			Yes	Yes	Yes	Yes	75	7:30am 5:30pm
Contoocook	Contoocook Village Learning Center	Family Group Child Care	Yes				Yes	Yes	Yes	12	7:30am 5:30pm
Contoocook	Free to be me Childcare	Family Group Child Care	Yes		Yes	Yes	Yes	Yes	Yes	17	7:30am 5:30pm
Contoocook	Julie Morris FCC	Family Child Care	Yes		Yes	Yes	Yes	Yes	Yes	3	7:30am 5:30pm
Contoocook	Karen Pfeiffer FDC	Family Child Care	Yes		Yes	Yes	Yes	Yes	Yes	9	6:45am 5:00pm
Deering	Storytime Day Care	Family Child Care	Yes		Yes	Yes	Yes			6	6:30am 5:15pm
Dunbarton	Grapevine Road Daycare	Family Group Child Care	Yes		Yes	Yes	Yes	Yes	Yes	12	6:30am 4:30pm
Dunbarton	New Morning School, Inc at Dunbarton	School Age		Yes					Yes	50	2:30pm 6:00pm
Epsom	Epsom Better Buddies	School Age	Yes				Yes	Yes	Yes	80	6:00am 5:30pm

Location	Name	Program Type	Full Time	Part Time	Infant	Toddler	Pre-school	Kindergarten	School Age	Total # of Children (Licensed Capacity)	Hours
Epsom	Precious Angels Daycare	Group Child Care Center, Child Care Nursery, Pre-School, School Age	Yes		Yes	Yes	Yes	Yes	Yes	68	6:45am 5:45pm
Henniker	Creative Beginnings	Group Child Care Center, Pre-School	Yes				Yes	Yes		18	8:30am 3:30pm
Henniker	Marlene Kreister	Family Child Care	Yes		Yes	Yes	Yes	Yes	Yes	9	7:00am 5:00pm
Henniker	White Birch Community Center	Child Care Nursery, Pre-School, School Age	Yes			Yes	Yes	Yes	Yes	85	6:30am 5:30pm
Hillsborough	George Procter Memorial Pre-School & Child Care	Child Care Nursery, Group Child Care Center, Pre-School, School Age	Yes		Yes	Yes	Yes	Yes	Yes	40	8:30am 6:30pm
Hillsborough	Hillsborough - Deering Elementary After School	School Age		Yes				Yes	Yes	50	3:00pm 5:30pm
Hillsborough	Hillsborough Child Development Center; Southern NH Services HS	Group Child Care Center, Child Care Nursery, Pre-School, School Age	Yes			Yes	Yes	Yes	Yes	55	6:15am 5:30pm
Hillsborough	Homecoming Child Care	Family Group Child Care	Yes		Yes	Yes	Yes	Yes	Yes	17	7:00am 5:00pm
Contoocook	Hopkinton Comm. Center Pre-School	Pre-School	Yes				Yes	Yes		18	8:30am 3:00pm
Hopkinton	Parkside Children's House	Pre-School	Yes				Yes			24	8:30am 2:40pm
Hopkinton	Tween School & Home	School Age		Yes				Yes	Yes	50	2:30pm 5:30pm
Loudon	Blu Bear Day Care	Group Child Care Center	Yes		Yes	Yes	Yes	Yes		12	7:00am 5:00pm
Loudon	Concord Family YMCA After School @ Loudon	School Age		Yes				Yes	Yes	45	2:30pm 5:30pm
Loudon	Lady Bees and Butterfrogs	Pre-School		Yes			Yes	Yes		12	9:15am 12:15pm
Loudon	Little Folks Daycare	Family Child Care	Yes		Yes	Yes	Yes	Yes	Yes	9	7:00am 5:30pm
Loudon	Little Lamb Day Care	Family Child Care	Yes		Yes	Yes	Yes	Yes	Yes	9	7:30am 5:30pm

Location	Name	Program Type	Full Time	Part Time	Infant	Toddler	Pre-school	Kindergarten	School Age	Total # of Children (Licensed Capacity)	Hours
Loudon	Concord YMCA at Loudon	School Age		Yes					Yes	45	2:30pm 5:30pm
Pembroke	First Choice for Children Inc.	Pre-School, Child Care Nursery, School Age, Group Child Care Center	Yes		Yes	Yes	Yes	Yes	Yes	61	7:00am 5:30pm
Pembroke	Animation Station	Child Care Nursery, Pre-School, Group Child Care Center, Night Care	Yes		Yes	Yes	Yes	Yes	Yes	112	7:00am 6:00pm
Pembroke	Children's Center of Attention	Pre-school, Child Care Nursery, School Age, Group Child Care Center	Yes		Yes	Yes	Yes	Yes	Yes	72	6:30am 5:30pm
Pembroke	Concord YMCA Middle School at 3 Rivers School	School Age		Yes					Yes	45	2:00pm 6:00pm
Pembroke	Hurney's Day Care	Group Child Care Center, Child Care Nursery	Yes		Yes	Yes	Yes	Yes	Yes	32	6:30am 5:30pm
Pembroke	Institute for Learning	Group Child Care Center, School Age	Yes				Yes	Yes	Yes	35	7:00am 5:30pm
Pembroke	New Morning School at Pembroke Hill School	School Age		Yes				Yes	Yes	54	2:00pm 6:00pm
Pembroke	Wonderland Pre-School	Pre-School		Yes			Yes	Yes		24	8:45am 11:15am
Penacook	Busy Little Bees	Family Child Care	Yes		Yes	Yes	Yes	Yes		6	7:30am 5:30pm
Penacook	Penacook Community Child Care	Group Child Care Center	Yes				Yes	Yes	Yes	90	7:00am 6:00pm
Penacook	Penacook Community Center at Penacook Elementary School	School Age		Yes					Yes	90	2:30pm 5:30pm
Pittsfield	Blueberry Express Day Care Center	Group Child Care Center, Child Care Nursery, School Age	Yes		Yes	Yes	Yes	Yes	Yes	56	6:45am 5:30pm
Pittsfield	Pittsfield Headstart	Pre-School		Yes			Yes	Yes		17	8:30am 12:30pm
Salisbury	Kids with Spirit	School Age		Yes				Yes	Yes	15	2:30pm 5:30pm

Location	Name	Program Type	Full Time	Part Time	Infant	Toddler	Pre-school	Kindergarten	School Age	Total # of Children (Licensed Capacity)	Hours
Sutton	Live Wire Day Care and Pre-School	Child Care Nursery, Pre-School, Group Child Care Center	Yes		Yes	Yes	Yes	Yes		24	7:00am 5:30pm
Warner	Kearsarge Children's Center	Pre-School, School Age	Yes			Yes	Yes	Yes	Yes	38	7:00am 6:00pm
Warner	Warner Cooperative Pre-School	Pre-School		Yes			Yes	Yes		20	8:30am 11:30am
Warner	Warner Headstart	Pre-School		Yes			Yes	Yes		17	8:30am 12:30pm
Webster	Care a Lot Daycare	Family Group Child Care	Yes			Yes	Yes	Yes	Yes	17	6:30am 5:30pm
Webster	Chris' Sunshine FCC	Family Child Care	Yes		Yes	Yes	Yes	Yes	Yes	9	6:30am 5:00pm
	<b>TOTAL 96</b>	<b>School Age - 49 Pre-School - 37 Nursery - 30 Group CC - 33 Family CC - 14 Family Group CC - 8 Nighttime Care - 1</b>	<b>65 Full Time</b>	<b>31 Part Time</b>	<b>38 Infant</b>	<b>58 Toddler</b>	<b>75 Pre-school</b>	<b>85 Kindergarten</b>	<b>73 School Age</b>	<b>4,083</b>	



## **APPENDIX B STATE-DEFINED TYPES OF LICENSED PROVIDERS**

### ***Family Child Care Home***

An occupied residence in which child day care is provided for no more than 12 hours per day, except in emergencies, for up to 6 children from one or more unrelated families. The 6 children shall include any foster children residing in the home and all children related to the caregiver except children who are 10 years of age or older. In addition to the 6 children, up to 3 children attending a full day school program may also be cared for up to 5 hours per day on school days and no more than 12 hours per day during school holidays.

### ***Family Group Child Care Home***

An occupied residence in which child day care is provided for no more than 12 hours per day, except in emergencies, for up to 12 children from one or more unrelated families. The 12 children shall include all children related to the caregiver and any foster children residing in the home, except children who are 10 years of age or older. In addition to the 12 children, up to 5 children attending a full day school program may also be cared for up to 5 hours per day on school days and no more than 12 hours per day during school holidays.

### ***Group Child Care Center***

A child day care agency in which child day care is provided for preschool children and up to 5 school age children, whether or not the service is known as a day nursery, nursery school, kindergarten, cooperative child development center, day care center, center for the developmentally disabled, progressive school, Montessori school, or by any other name.

### ***Child Care Nursery***

A child day care agency in which child day care is provided for any part of a day, for 5 or more children under the age of 3 years.

### ***Preschool Program***

A child day care agency providing care and a structured program for children 3 years of age and older who are not attending a full day school program. The total number of hours a child may be enrolled in a preschool program shall not exceed 5 hours per day.

*(continued)*

**School Age Program**

A child care agency providing child day care for up to 5 hours per school day, before or after, or before and after, regular school hours and all day during school holidays and vacations, and which is not licensed for 6 or more children who are 4 years and 8 months of age or older. The number of children shall include all children present during the period of the program, including those children related to the caregiver.

**Night Care Program**

A center or family home in which child day care is provided during the evening and night time hours. A child day care agency may be licensed for day care, night care, or both.



Photographer: Geoff Forester, Concord, NH

Courtesy of: N.H. Community Loan Fund

*“If properly funded and managed, investment in early childhood development yields an extraordinary return, far exceeding the return on most investments, private or public.”*

Fedgazette, March 2003  
*Early Childhood Development:  
Economic Development with a High Public Return*

Art Rolnick, Senior Vice President and Director of Research,  
and Rob Grunewald, Regional Economic Analyst  
*Federal Reserve Bank of Minneapolis*

## APPENDIX C METHODOLOGY FOR CALCULATING LICENSED CHILD CARE GROSS RECEIPTS

For licensed child care, the estimate of gross receipts represents a snapshot of the industry taken at a particular point in time. Licensed child care revenue calculations are based on a simple formula:

$$\text{Licensed Capacity} \times \text{Average Fee per child} = \text{Gross Receipts}^{23}$$

The gross receipts formula is further broken down to account for the differences in the fees charged by the age of the child. The table below shows this breakdown using “The NH Child Care and Early Education Market Rate Survey for 2001” (Aug 2002).

Type of Care	Licensed Capacity for Type of Care in Central NH Region <sup>24</sup>	Average Fee for Care	Total Fee Paid for Care by Type of Care in Central NH Region
Infant Care (Birth-12 mo.)	233	\$140.77/wk \$7,320.04/yr	\$32,799.41/wk \$1,705,569.32/yr.
Toddler Care (13-24 mo.)	551	\$131.59/wk \$6,842.68/yr	\$72,506.09/wk \$3,770,316.68/yr.
Preschool Aged Care (25-59 mo.)	1,223	\$124.41/wk <sup>25</sup> \$6,469.32/yr	\$152,153.43/wk \$7,911,978.36/yr.
Children (5-6 years)	447	\$117.96/wk \$6,133.92/yr	\$52,728.12/wk \$2,741,862.24/yr.
School age (6-17 years)	1,663	\$65.00/wk \$3,380.00/yr.	\$108,095.00/wk \$5,620,940.00/yr.
<b>TOTAL</b>			\$418,282.05/wk \$21,750,666.60/yr.

The total calculated gross receipts assumes that the licensed child care providers are receiving 100% payment for each child care spot they are licensed for every week at the average rate. This is unlikely so the total gross receipt figure is a best case scenario for the region.

## **APPENDIX D LICENSED PROVIDER EMPLOYMENT FORMULAS AND CALCULATIONS**

The formulas below use the New Hampshire Child Care Program Licensing Rules and the information contained in **Appendix I**. These are the minimum standards for the number of staff required for licensed child care providers to follow.

### ***Family Child Care Home***

6 preschool and 3 school-age children 1 staff person

- maximum of 4 children shall be younger than 36 months
- maximum of 2 children shall be younger than 24 months

**There are 6 providers in the Central NH Region 6 STAFF**

6 preschool and 3 school-age children 2 staff people

- maximum of 4 children shall be younger than 24 months

**There is 1 provider in the Central NH Region 2 STAFF**

### ***Family Group Child Care Home***

6 preschool and 3 school-age children 1 staff person

- maximum of 4 children shall be younger than 36 months
- maximum of 2 children shall be younger than 24 months

**There are no providers in the Central NH Region 0 STAFF**

12 preschool children and 5 school-age children 2 staff people

- maximum of 4 children shall be younger than 24 months

**There are 9 providers in the Central NH Region 18 STAFF**

### ***Non-Teaching Staff Employment in Licensed Child Care***

Non-teaching staff are estimated for child care centers (centers with a licensed capacity of more than 80 children). Most small to medium size centers fill these positions with teaching staff. The formula used is:

$3X \text{ \# of Centers with licensed capacity } \geq 80 \text{ children} = \text{ \# Non-teaching staff}$

**There are 11 providers in the Central NH Region 33 STAFF**

*(continued)*

**Child Care Nursery, Group Child Care Center, Preschool,  
and School Age Program**

6 weeks-12 months 1 staff to every 4 children

**There are 36 providers in the Central NH Region 52 STAFF**

**With a capacity of 207 children in this age group (Infant)**

13 months-24 months 1 staff to every 5 children

25 months-35 months 1 staff to every 6 children

**There are 51 providers in the Central NH Region 84 STAFF<sup>26</sup>**

**With a capacity of 505 children in this age group (Toddler)**

36 months-47 months 1 staff to every 8 children

48 months-59 months 1 staff to every 12 children

**There are 71 providers in the Central NH Region 115 STAFF<sup>27</sup>**

**With a capacity of 1,145 children in this age group (Preschool)**

60 months + 1 staff to every 15 children

**There are 49 providers in the Central NH Region 28 STAFF**

**With a capacity of 423 children in this age group (Kindergarten)**

**There are 28 providers in the Central NH Region 26 STAFF**

**With a capacity of 393 children in this age group (School-age)**

**There are 22 providers in the Central NH Region 40 STAFF<sup>28</sup>**

**With a capacity of 1,228 children in this age group  
(School Age Program Only)**

**TOTAL EMPLOYED IN THE CENTRAL NH REGION**

**404 STAFF<sup>29</sup>**

## **APPENDIX E EXPLANATION OF THE REMI MODEL**

Estimates for the impact of child care services on indirect and induced earnings and other productivity effects are based on application of the REMI Policy Insight New Hampshire Employment Security Version 5.5 EDFS 172 Multi Region Model.

The New Hampshire Employment Security REMI Model uses area specific data on industrial and commercial activity to trace how a dollar of investment moves through a specified economy. The Model is based on a table of direct requirement coefficients which indicates the input of goods and services required to produce a dollar's worth of output. Standard economic "production functions" – the capital, labor, and technology – needed to purchase a given set of goods determine how changes in demand for goods and services ultimately affect the demand for the inputs to these services. For example, producing a ton of steel may require three workers and a particular set of equipment, representing technology and capital investment, which would not be required if the steel were no longer needed. Likewise, child care programs must purchase educational materials, facilities, and professional staff services.

The NHES Model uses economic census data for 172 industries from the U.S. Bureau of Economic Analysis (BEA) and other economic data to compile county-level wage and salary information at the standard industrial code level. New Hampshire county data are adjusted for the industrial and trading patterns of the United States. Based on this structure, the Model estimates the regional economic impact that would result from a dollar change in the output of local industries delivered to final demand (customer). Thus it measures the creation of wealth in the region.

Estimates for the impact of child care on the economy are based on three primary "multipliers", as follows:

### **Direct Effects**

Effects introduced into the region's economy as a result of spending on child care services

### **Secondary Effects**

**Indirect Effects:** Effects of the purchasing of goods and services by the child care industry reflected in spending by the Region's industries impacted by those purchases. These effects result from a change in money spent by individuals or firms that incur direct impacts.

**Induced Effects:** Effects of consumption of goods and services consumed by households directly and indirectly earning income from the child care industry. These effects reflect changes in the regional economy caused by changes in spending patterns as a result of the direct and indirect activity.

## **APPENDIX F GAUGING THE ECONOMIC IMPACT OF THE CHILD CARE INDUSTRY ON THE CENTRAL NH REGION**

To estimate the economic impact of child care services on the Central New Hampshire Planning Region, the Economic and Labor Market Information Bureau of New Hampshire Employment Security ran a simulation using its New Hampshire Ten-county REMI Model. This is an econometric model developed by Regional Economic Models, Inc.

To simulate the loss of the child care industry in the Central New Hampshire Planning Region, Merrimack County was used as a proxy for the Planning Region. Merrimack County serves as a reasonable proxy for the Planning Region. The Planning Region includes 18 of the 28 cities and towns of Merrimack County and two Hillsborough County towns. The Region is equivalent to about 80 percent of the County in its population, number of jobs in covered employment<sup>30</sup>, and labor force size<sup>31</sup>.

To represent the loss of the child care industry in the Central New Hampshire Planning Region, the Region's share of employment in child care services was removed from the Merrimack County economy. The ratio of covered employment in Child Care Services (NAICS 65-624400/SIC 8351) in the Region to Child Care Services in the County was 77.9 percent in 2002. Therefore, in the simulation, Child Care Services employment in Merrimack County was reduced, for each year, by 77.9 percent starting in 2001 and carried through the last year of the simulation. The results of the simulation were then compared to the REMI model's control forecast for Merrimack County to gauge what the loss of the child care industry would mean to the Central Planning Region's economy.

*(continued)*

**Summary of Simulation Results**

<b>Variable</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>
<b>Employment by industry</b>					
Total all industries	-702	-698	-711	-720	-730
Child day care services – direct effect	-589	-588	-603	-615	-628
Other industries – secondary effect	-113	-110	-108	-104	-103
<b>Employment by demand source</b>					
Private nonfarm	-689	-680	-688	-692	-698
<b>Employment by occupation</b>					
Primary, secondary, and special education	-242	-240	-245	-248	-251
Child care workers	-125	-126	-130	-133	-137
<b>Wages (million nominal)</b>					
Total all industries	-\$13.317	-\$14.258	-\$15.333	-\$16.163	-\$17.018
Child day care services – direct effect	-\$8.278	-\$8.547	-\$9.102	-\$9.581	-\$10.123
Other industries – secondary effect	-\$5.039	-\$5.711	-\$6.232	-\$6.583	-\$6.895
<b>GRP (Value-added) (million fixed 1996)</b>					
Central New Hampshire Planning Region	-\$13.608	-\$13.881	-\$14.422	-\$14.842	-\$15.348
Child day care services – direct effect	-\$7.958	-\$8.258	-\$8.813	-\$9.336	-\$9.892
Other Industries – secondary effect	-\$5.650	-\$5.623	-\$5.610	-\$5.505	-\$5.457
<b>GRP (Final Demand) (million fixed 1996)</b>					
Total all industries	-\$13.608	-\$13.881	-\$14.422	-\$14.842	-\$15.348

**Direct and Secondary Effects on Employment by Industry**

Reducing the employment for Child Care Services by 77.9% throughout the simulation period results in net direct loss in Child Care Services of 588 jobs in 2003 which extends to a 628-job loss by 2006.

The secondary impact from the disappearance of child care employment shows up most plainly in the retail trade, construction local government employment and other social services industries. All told, secondary job losses total 110 in 2003 and slip to 103 by 2006. So total losses due to the elimination of the child care industry in the Region add to 698 in 2004 and 730 in 2006.

*(continued)*



### **Effects on Industry Employment**

<b>Industry</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>
Total Employment	-702	-698	-711	-720	-730
Private Nonfarm	-689	-680	-688	-692	-698
Child daycare services	-589	-588	-603	-615	-628
Retail trade	-30	-30	-30	-29	-28
Construction	-21	-21	-21	-20	-20
Government	-13	-18	-23	-28	-32
Individual and miscellaneous social services	-11	-11	-10	-9	-8

The REMI Model uses employment estimates published by the US Department of Commerce, Bureau of Economic Analysis (BEA), based on an annual sample survey of businesses. The BEA estimates capture self-employment and sole proprietor information by using data from the Internal Revenue Service.

### **Impact on Occupational Employment**

The impact on occupational employment is pretty much as expected. The occupations with the largest job losses can be largely attributed to the direct effect of the loss of employment in the child care industry. In primary, secondary, and special education teaching occupations, 240 jobs were lost in 2003 and 251 by 2006. In Child Care Services occupations 126 jobs were lost in 2003, and in 2006 the net loss grows to 137 jobs.

### **Employment Change by Occupation**

<b>Occupation</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>
Primary, secondary, and special ed teachers	-242	-240	-245	-248	-251
Child care workers	-125	-126	-130	-133	-137
Library, museum, training and other	-84	-84	-87	-90	-93
Management occupations	-55	-54	-56	-57	-58
Secretaries, administrative assistants	-19	-19	-20	-20	-20
Cooks and food preparation workers	-19	-19	-20	-20	-20
Construction trades and related work	-15	-15	-15	-15	-15
Building cleaning workers	-10	-10	-10	-10	-10
Motor vehicle operators	-9	-9	-10	-10	-10
All other and misc. counselors, social services	-9	-9	-9	-9	-10

*(continued)*

**Loss of Wages**

The direct impact on wages of removing the Region's child care industry is the loss of \$8.5 million in its workers' purchasing capacity in 2003. By 2006, the wages for Child Care Services continue to slide to -\$10.1 million.

Including secondary effects, total wages lost in 2003 are \$14.3 million and \$17.0 million in 2006.

**Gross Regional Product**

In 2003 the Child Care Services industry's lost contribution to the Region's Gross Regional Product is \$13.9 million in fixed 1996 dollars (about \$16.9 million in 2004 dollars using the CPI-U as an inflation gauge)<sup>32</sup>.

**Local Government Revenue**

Without the Child Care Services industry, local government revenue can be expected to be \$620 thousand less, in 2001 dollars, in 2003 (or \$668 thousand in 2004 dollars, adjusting with the CPI-U).

**Net change in Local Government Revenue and Expenditures  
(2001 dollars)**

	2002	2003	2004	2005	2006
Local Revenues at Adjusted State Average Rates	-\$480,247	-\$619,624	-\$752,451	-\$878,914	-\$1,000,645
Property Tax	-\$197,019	-\$275,130	-\$350,419	-\$421,574	-\$489,334
Local Expenditures at Adjusted State Average Rates	-\$607,819	-\$853,181	-\$1,066,699	-\$1,295,693	-\$1,516,162

## APPENDIX G CALCULATIONS OF NUMBER OF WORKING PARENTS PER CHILD 0-13 YEARS

### Labor Force Status of Children's Parents 2000, Central NH Region

	# of children <6	# of children <6 with working parents	# of children 6-13 <sup>33</sup>	# of children 6-13 with working parents	# of children 0-13 with working parents
<b>Living with two parents</b>	5,758		9,376		
Both parents in labor force	3,631	3,631	7,040	7,040	10,671
Father only in labor force	1,895	1,895	1,870	1,870	3,765
Mother only in labor force	153	153	329	329	482
Neither parent in labor force	79		137		
<b>Living with one parent</b>	1,761		2,866		
Living with father	421		612		
In labor force	358	358	555	555	913
Not in Labor force	63		57		
Living with Mother	1,340		2,254		
In labor force	999	999	1,935	1,935	2,934
Not in Labor Force	341		319		
<b>Total</b>	<b>7,519</b>	<b>7,036</b>	<b>12,242</b>	<b>11,729</b>	<b>18,765</b>
<b># of Children 0-13 (2000)</b>	<b>19,761</b>				
<b># Families with children 0-13 (2000)<sup>34</sup></b>	<b>9,624</b>				

Source: US Census 2000

*(continued)*

## Estimated Number of Working Parents with Children in Care

### **Proportion of Children with Parents in Labor Force**

# children 0-13 with working parents / # Of children 0-13  
18,765 / 19,761 **0.95**

### **Estimated Working Parents per Child 0-13**

(# Kids 0-13 with working parents + # Families with kids 0-13) /  
# children 0-13 with working parents  
(18,765 + 9,264) / 18,765 **1.49**

### **Average # of Children per Family (2000)**

# Children 0-13 / # Families with Children 0-13  
19,761 / 9,264 **2.13**

### **Estimated # of Working Parents per Family**

(# Children 0-13 w/ working parents)(Est. Working Parents per Child) /  
# Children 0-13  
(18,765)(1.49) / 19,761 **1.41**

### **Estimated # of Working Parents per Child 0-13**

Estimated # of Working Parents per Family /  
Average # of Children per Family  
1.41/2.13 **0.66**

### **# of Working Parents Whose Children are in Child Care**

(Estimated # of Working Parents per Child 0-13)(Licensed Capacity)  
(0.66)(4,083) **2,695**

2004 LICENSED CAPACITY BREAKDOWN

APPENDIX I

Name	Type	Total License Capacity	Infant	Toddler	Pre-school	Kindergarten	School Age
Concord Family YMCA at Allentown Middle School	School Age	45					
ACTUAL Enrollment		45	0	0	0	0	45
% of ACTUAL Enrollment			0%	0%	0%	0%	100%
<b>Total License Capacity</b>			<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>45</b>
Peace of Mind After School	School Age	45					
ACTUAL Enrollment		45	0	0	0	0	45
% of ACTUAL Enrollment			0%	0%	0%	0%	100%
<b>Total License Capacity</b>			<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>45</b>
School St. Kindergarten and Daycare Center	Pre-School, School Age	20					
ACTUAL Enrollment		20	0	3	15	2	0
% of ACTUAL Enrollment			0	15%	75%	10%	0
<b>Total License Capacity</b>			<b>0</b>	<b>3</b>	<b>15</b>	<b>2</b>	<b>0</b>
Tender Years Child Care & Pre-School	Pre-School, School Age	74					
ACTUAL Enrollment		88	4	22	20	9	33
% of ACTUAL Enrollment			4.50%	25%	23%	10%	37.50%
<b>Total License Capacity</b>			<b>3</b>	<b>19</b>	<b>17</b>	<b>7</b>	<b>28</b>
Best @ Boscawen Elementary	School Age	45					
ACTUAL Enrollment		45	0	0	0	0	45
% of ACTUAL Enrollment			0%	0%	0%	0%	100%
<b>Total License Capacity</b>			<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>45</b>

Name	Type	Total License Capacity	Infant	Toddler	Pre-school	Kindergarten	School Age
Concord Family YMCA SAP @ Boscawen Elementary School	School Age	45					
ACTUAL Enrollment		45	0	0	0	0	45
% of ACTUAL Enrollment			0%	0%	0%	0%	100%
<b>Total License Capacity</b>			<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>45</b>
Merrimack Valley Day Care Service @MCNH	Child Care Nursery, Group Child Care Center	45					
ACTUAL Enrollment		34	8	6	16	0	4
% of ACTUAL Enrollment			23.50%	18%	47%	0%	12%
<b>Total License Capacity</b>			<b>10</b>	<b>8</b>	<b>21</b>	<b>0</b>	<b>6</b>
Bow Kids Inc.	School Age	75					75
ACTUAL Enrollment		75	0	0	0	0	75
% of ACTUAL Enrollment			0%	0%	0%	0%	100%
<b>Total License Capacity</b>			<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>75</b>
Bow Montessori	Family Group Child Care	12					
ACTUAL Enrollment		16	0	0	16	0	0
% of ACTUAL Enrollment			0%	0%	100%	0%	0%
<b>Total License Capacity</b>			<b>0</b>	<b>0</b>	<b>12</b>	<b>0</b>	<b>0</b>
Celebrating Children	Pre-School	31					
ACTUAL Enrollment		31	0	0	31	0	0
% of ACTUAL Enrollment			0%	0%	100%	0%	0%
<b>Total License Capacity</b>			<b>0</b>	<b>0</b>	<b>31</b>	<b>0</b>	<b>0</b>
Joyful Noise Learning Center	Group Child Care Center, Child Care Nursery, Pre-School, School Age	24					
ACTUAL Enrollment		64	0	0	32	11	21
% of ACTUAL Enrollment			0%	0%	50%	17%	33%
<b>Total License Capacity</b>			<b>0</b>	<b>0</b>	<b>12</b>	<b>4</b>	<b>8</b>

Name	Type	Total License Capacity	Infant	Toddler	Pre-school	Kindergarten	School Age
Rockwood Acres Family DC	Group Child Care Center, Child Care Nursery, School Age	24					
ACTUAL Enrollment		NA	NA	NA	NA	NA	NA
% of ACTUAL Enrollment			-	-	-	-	-
Total License Capacity			5	5	5	5	4
Kearsarge Area Preschool	Group Child Care Center, Pre-School	18					
ACTUAL Enrollment		18	0	0	18	0	0
% of ACTUAL Enrollment			0%	0%	100%	0%	0%
Total License Capacity			0	0	18	0	0
Live Wire Before and After School	School Age	45					
ACTUAL Enrollment			0	0	0	0	45
% of ACTUAL Enrollment			0%	0%	0%	0%	100%
Total License Capacity			0	0	0	0	45
Marge's Child Care	Family Child Care	9					
ACTUAL Enrollment		6	1	1	4	0	0
% of ACTUAL Enrollment			17%	17%	66%	0%	0%
Total License Capacity			1	1	7	0	0
Canterbury Daycare Center	Group Child Care Center, Child Care Nursery, School Age	24					
ACTUAL Enrollment		32	0	1	7	4	20
% of ACTUAL Enrollment			0%	3%	22%	12.50%	62.50%
Total License Capacity			0	1	5	3	15
Kelly Corner School	Group Child Care Center, Pre-School	24					
ACTUAL Enrollment		35	0	0	35	0	0
% of ACTUAL Enrollment			0%	0%	100%	0%	0%
Total License Capacity			0	0	24	0	0

Name	Type	Total License Capacity	Infant	Toddler	Pre-school	Kindergarten	School Age
Kozy Kitten Korner	Family Group Child Care	12					
ACTUAL Enrollment		6	2	4	0	0	0
% of ACTUAL Enrollment			33%	67%	0%	0%	0%
<b>Total License Capacity</b>			<b>4</b>	<b>8</b>	<b>0</b>	<b>0</b>	<b>0</b>
<hr/>							
YMCA SAP at Chichester Central	School Age	45					
ACTUAL Enrollment		45	0	0	0	0	45
% of ACTUAL Enrollment			0%	0%	0%	0%	100%
<b>Total License Capacity</b>			<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>45</b>
<hr/>							
After School - Kimball	School Age	60					
ACTUAL Enrollment		60	0	0	0	0	60
% of ACTUAL Enrollment			0%	0%	0%	0%	100%
<b>Total License Capacity</b>			<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>60</b>
<hr/>							
After School - Beaver	School Age	60					
ACTUAL Enrollment		60	0	0	0	0	60
% of ACTUAL Enrollment			0%	0%	0%	0%	100%
<b>Total License Capacity</b>			<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>60</b>
<hr/>							
After School - Conant	School Age	60					
ACTUAL Enrollment		60	0	0	0	0	60
% of ACTUAL Enrollment			0%	0%	0%	0%	100%
<b>Total License Capacity</b>			<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>60</b>
<hr/>							
After School - Broken Ground	School Age	90					
ACTUAL Enrollment		90	0	0	0	0	90
% of ACTUAL Enrollment			0%	0%	0%	0%	100%
<b>Total License Capacity</b>			<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>90</b>



Name	Type	Total License Capacity	Infant	Toddler	Pre-school	Kindergarten	School Age
Concord Family YMCA	Group Child Care Center, Child Care Nursery, Pre-School, School Age	232					
ACTUAL Enrollment		106	10	12	52	32	0
% of ACTUAL Enrollment			10%	11%	49%	30%	0%
Total License Capacity			23	25	114	70	0
Concord Headstart and Child Care	Group Child Care Center, Child Care Nursery, Pre-School, School Age	64					
ACTUAL Enrollment		36	2	6	14	11	3
% of ACTUAL Enrollment			5.50%	17%	39%	30.50%	8%
Total License Capacity			3	11	25	20	5
East Concord Cooperative Preschool	Pre-School	18					
ACTUAL Enrollment		18	0	0	18	0	0
% of ACTUAL Enrollment			0%	0%	100%	0%	0%
Total License Capacity			0	0	18	0	0
East Side Learning Center	Group Child Care Center, Child Care Nursery, Pre-School, School Age	135					
ACTUAL Enrollment		205	0	0	35	32	138
% of ACTUAL Enrollment			0%	0%	17%	16%	67%
Total License Capacity			0	0	23	22	90
Emerson School for Preschoolers	Center Based Child Care, Pre-School	22					
ACTUAL Enrollment		58	0	0	58	0	0
% of ACTUAL Enrollment			0%	0%	100%	0%	0%
Total License Capacity			0	0	22	0	0
First Start Children's Day Care	Group Child Care Center, Child Care Nursery, School Age	150					
ACTUAL Enrollment		151	12	33	43	15	48
% of ACTUAL Enrollment			8%	22%	28%	10%	32%
Total License Capacity			12	33	42	15	48

Name	Type	Total License Capacity	Infant	Toddler	Pre-school	Kindergarten	School Age
Girls Inc. of New Hampshire @ Concord	School Age	75					
ACTUAL Enrollment		94	0	0	0	10	84
% of ACTUAL Enrollment			0%	0%	0%	11%	89%
<b>Total License Capacity</b>			<b>0</b>	<b>0</b>	<b>0</b>	<b>8</b>	<b>67</b>
Grammy's Safe Harbor	Family Child Care	6					
ACTUAL Enrollment		3	0	0	1	1	1
% of ACTUAL Enrollment			0%	0%	33.30%	33.30%	33.30%
<b>Total License Capacity</b>			<b>0</b>	<b>0</b>	<b>2</b>	<b>2</b>	<b>2</b>
Green Gables Family DC	Family Group Child Care	12					
ACTUAL Enrollment		NA	NA	NA	NA	NA	NA
% of ACTUAL Enrollment			-	-	-	-	-
<b>Total License Capacity</b>			<b>2</b>	<b>2</b>	<b>2</b>	<b>3</b>	<b>2</b>
Immaculate Heart of Mary Children's Center	Group Child Care Center, Child Care Nursery, Pre-School, School Age	89					
ACTUAL Enrollment		NA	NA	NA	NA	NA	NA
% of ACTUAL Enrollment			-	-	-	-	-
<b>Total License Capacity</b>			<b>18</b>	<b>18</b>	<b>18</b>	<b>18</b>	<b>18</b>
Learning Center @ Concord Hospital (Employee Only)	Center Based Child Care , Child care nursery, School Age	121					
ACTUAL Enrollment		129	17	31	41	14	26
% of ACTUAL Enrollment			13%	24%	32%	11%	20%
<b>Total License Capacity</b>			<b>16</b>	<b>29</b>	<b>39</b>	<b>13</b>	<b>24</b>
Little Saints Christian School	Pre-School, School Age	18					
ACTUAL Enrollment		8	0	0	7	0	1
% of ACTUAL Enrollment			0%	0%	87.50%	0%	12.50%
<b>Total License Capacity</b>			<b>0</b>	<b>0</b>	<b>16</b>	<b>0</b>	<b>2</b>

Name	Type	Total License Capacity	Infant	Toddler	Pre-school	Kindergarten	School Age
Mary Heine FCC	Family Child Care	6					
ACTUAL Enrollment		NA	NA	NA	NA	NA	NA
% of ACTUAL Enrollment			-	-	-	-	-
<b>Total License Capacity</b>			<b>1</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>2</b>
Mary's Little People	Group Child Care Center, Child Care Nursery	35					
ACTUAL Enrollment		29	0	5	21	2	1
% of ACTUAL Enrollment			0%	18%	72%	7%	3%
<b>Total License Capacity</b>			<b>0</b>	<b>7</b>	<b>25</b>	<b>2</b>	<b>1</b>
Merrimack Valley Day Care Fruit Street	Group Child Care Center, Child Care Nursery, School Age	80					
ACTUAL Enrollment		71	4	30	34	3	0
% of ACTUAL Enrollment			6%	42%	48%	4%	0%
<b>Total License Capacity</b>			<b>5</b>	<b>34</b>	<b>38</b>	<b>3</b>	<b>0</b>
Merrimack Valley Day Care @Eagles Bluff	Group Child Care Center, Child Care Nursery, School Age	44					
ACTUAL Enrollment		35	0	7	13	7	8
% of ACTUAL Enrollment			0%	20%	37%	20%	23%
<b>Total License Capacity</b>			<b>0</b>	<b>9</b>	<b>16</b>	<b>9</b>	<b>10</b>
Merrimack Valley Day Care @NH Hospital	Group Child Care Center, Child Care Nursery, School Age	35					
ACTUAL Enrollment		27	0	12	15	0	0
% of ACTUAL Enrollment			0%	44%	56%	0%	0%
<b>Total License Capacity</b>			<b>0</b>	<b>15</b>	<b>20</b>	<b>0</b>	<b>0</b>

Name	Type	Total License Capacity	Infant	Toddler	Pre-school	Kindergarten	School Age
Montessori Children's Center of Concord	Group Child Care Center, Pre-School	21					
ACTUAL Enrollment		25	0	0	20	5	0
% of ACTUAL Enrollment			0%	0%	80%	20%	0%
<b>Total License Capacity</b>			<b>0</b>	<b>0</b>	<b>17</b>	<b>4</b>	<b>0</b>
Nancy's Day Care	Family Child Care	6					
ACTUAL Enrollment		6	0	2	1	1	2
% of ACTUAL Enrollment			0%	33%	17%	17%	33%
<b>Total License Capacity</b>			<b>0</b>	<b>2</b>	<b>1</b>	<b>1</b>	<b>2</b>
Presidential Oaks (Employee Only)	Group Child Care Center, Child Care Nursery, Pre-School, School Age	25					
ACTUAL Enrollment		16	6	6	0	1	3
% of ACTUAL Enrollment			37.50%	37.50%	0%	6%	19%
<b>Total License Capacity</b>			<b>9</b>	<b>9</b>	<b>0</b>	<b>2</b>	<b>5</b>
NHTI Child & Family Development Center	Child Care Nursery, Pre-School	50					
ACTUAL Enrollment		50	9	15	26	0	0
% of ACTUAL Enrollment			18%	30%	52%	0%	0%
<b>Total License Capacity</b>			<b>9</b>	<b>15</b>	<b>26</b>	<b>0</b>	<b>0</b>
Step Ahead Learning Center	Group Child Care Center, Child Care Nursery, Pre-School	70					
ACTUAL Enrollment		NA	NA	NA	NA	NA	NA
% of ACTUAL Enrollment			-	-	-	-	-
<b>Total License Capacity</b>			<b>17</b>	<b>17</b>	<b>17</b>	<b>19</b>	<b>0</b>
Sweet Dreams Day Care	Family Group Child Care	12					
ACTUAL Enrollment		NA	NA	NA	NA	NA	NA
% of ACTUAL Enrollment			-	-	-	-	-
<b>Total License Capacity</b>			<b>2</b>	<b>2</b>	<b>2</b>	<b>3</b>	<b>3</b>

Name	Type	Total License Capacity	Infant	Toddler	Pre-school	Kindergarten	School Age
The Children's Learning Center at St. Paul's School (Employee Only)	Child Care Nursery, Pre-School, School Age	75					
ACTUAL Enrollment		NA	NA	NA	NA	NA	NA
% of ACTUAL Enrollment			-	-	-	-	-
<b>Total License Capacity</b>			<b>15</b>	<b>15</b>	<b>15</b>	<b>15</b>	<b>15</b>
The Early Enrichment Center	Group Child Care Center, Child Care Nursery, Preschool	65					
ACTUAL Enrollment		75	8	49	18	0	0
% of ACTUAL Enrollment			11%	65%	24%	0%	0%
<b>Total License Capacity</b>			<b>7</b>	<b>42</b>	<b>16</b>	<b>0</b>	<b>0</b>
Tiny Tots Funspot	Group Child Care Center	15					
ACTUAL Enrollment		12	0	3	6	3	0
% of ACTUAL Enrollment			0%	25%	50%	25%	0%
<b>Total License Capacity</b>			<b>0</b>	<b>4</b>	<b>7</b>	<b>4</b>	<b>0</b>
Weezy's House	Family Child Care	6					
ACTUAL Enrollment		11	2	2	4	2	1
% of ACTUAL Enrollment			18%	18%	37%	18%	9%
<b>Total License Capacity</b>			<b>1</b>	<b>1</b>	<b>2</b>	<b>1</b>	<b>1</b>
Woodside School	Group Child Care Center, Child Care Nursery, Pre-School, School Age	75					
ACTUAL Enrollment		30	0	10	20	0	0
% of ACTUAL Enrollment			0%	33%	67%	0%	0%
<b>Total License Capacity</b>			<b>0</b>	<b>25</b>	<b>50</b>	<b>0</b>	<b>0</b>
Contoocook Village Learning Center	Family Group Child Care	12					
ACTUAL Enrollment		11	1	3	4	1	2
% of ACTUAL Enrollment			9%	27%	37%	9%	18%
<b>Total License Capacity</b>			<b>1</b>	<b>3</b>	<b>4</b>	<b>1</b>	<b>3</b>

Name	Type	Total License Capacity	Infant	Toddler	Pre-school	Kindergarten	School Age
Free To Be Childcare	Family Group Child Care	17					
ACTUAL Enrollment		5	1	0	4	0	0
% of ACTUAL Enrollment			20%	0%	80%	0%	0%
<b>Total License Capacity</b>			<b>3</b>	<b>0</b>	<b>14</b>	<b>0</b>	<b>0</b>
Julie Morris FCC	Family Child Care	3					
ACTUAL Enrollment		6	1	2	1	1	1
% of ACTUAL Enrollment			16.60%	33%	16.60%	16.60%	16.60%
<b>Total License Capacity</b>			<b>1</b>	<b>1</b>	<b>1</b>	<b>1</b>	
Karen Pfeiffer FDC	Family Child Care	9					
ACTUAL Enrollment		5	1	0	4	0	0
% of ACTUAL Enrollment			20%	0%	80%	0%	0%
<b>Total License Capacity</b>			<b>2</b>	<b>0</b>	<b>7</b>	<b>0</b>	<b>0</b>
Storytime Day Care	Family Child Care	6					
ACTUAL Enrollment		NA	NA	NA	NA	NA	NA
% of ACTUAL Enrollment			-	-	-	-	-
<b>Total License Capacity</b>			<b>1</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>2</b>
Grapevine Road Daycare	Family Group Child Care	12					
ACTUAL Enrollment		NA	NA	NA	NA	NA	NA
% of ACTUAL Enrollment			-	-	-	-	-
<b>Total License Capacity</b>			<b>2</b>	<b>2</b>	<b>2</b>	<b>3</b>	<b>3</b>
New Morning School, Inc. @ Dunbarton	School Age	50					
ACTUAL Enrollment		50	0	0	0	0	50
% of ACTUAL Enrollment			0%	0%	0%	0%	100%
<b>Total License Capacity</b>			<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>50</b>

Name	Type	Total License Capacity	Infant	Toddler	Pre-school	Kindergarten	School Age
Epsom Better Buddies	School Age	80					
ACTUAL Enrollment		80	0	0	0	0	80
% of ACTUAL Enrollment			0%	0%	0%	0%	100%
<b>Total License Capacity</b>			<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>80</b>
Precious Angels DC	Group Child Care Center, Child Care Nursery, Pre-School, School Age	68					
ACTUAL Enrollment		50	7	10	23	6	4
% of ACTUAL Enrollment			14%	20%	46%	12%	8%
<b>Total License Capacity</b>			<b>10</b>	<b>14</b>	<b>31</b>	<b>8</b>	<b>5</b>
Creative Beginnings	Group Child Care Center, Pre-School	18					
ACTUAL Enrollment		29	0	15	14	0	0
% of ACTUAL Enrollment			0%	52%	48%	0%	0%
<b>Total License Capacity</b>			<b>0</b>	<b>9</b>	<b>9</b>	<b>0</b>	<b>0</b>
Marlene Kreister	Family Child Care	9					
ACTUAL Enrollment		6	1	1	1	2	1
% of ACTUAL Enrollment			17%	17%	17%	33%	16%
<b>Total License Capacity</b>			<b>2</b>	<b>2</b>	<b>1</b>	<b>3</b>	<b>1</b>
White Birch Community Center	Child Care Nursery, Pre-School, School Age	85					
ACTUAL Enrollment		49	0	14	14	7	14
% of ACTUAL Enrollment			0%	28.50%	28.50%	14%	29%
<b>Total License Capacity</b>			<b>0</b>	<b>24</b>	<b>24</b>	<b>12</b>	<b>25</b>
George Procter Memorial Preschool & Child Care	Child Care Nursery, Group Child Care Center, Preschool, School Age	40					
ACTUAL Enrollment		NA	NA	NA	NA	NA	NA
% of ACTUAL Enrollment			-	-	-	-	-
<b>Total License Capacity</b>			<b>8</b>	<b>8</b>	<b>8</b>	<b>8</b>	<b>8</b>

Name	Type	Total License Capacity	Infant	Toddler	Pre-school	Kinder-garten	School Age
Hillsborough - Deering Elementary After School	School Age	50					
ACTUAL Enrollment		50	0	0	0	0	50
% of ACTUAL Enrollment			0%	0%	0%	0%	100%
<b>Total License Capacity</b>			<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>50</b>
Hillsborough Child Development Center; Southern NH Services HS	Group Child Care Center, Child Care Nursery, Pre-School, School Age	55					
ACTUAL Enrollment		55	0	0	40	10	5
% of ACTUAL Enrollment			0%	0%	73%	18%	9%
<b>Total License Capacity</b>			<b>0</b>	<b>0</b>	<b>40</b>	<b>10</b>	<b>5</b>
Homecoming Child Care	Family Group Child Care	17					
ACTUAL Enrollment		10	2	2	6	0	0
% of ACTUAL Enrollment			20%	20%	60%	0%	0%
<b>Total License Capacity</b>			<b>3</b>	<b>3</b>	<b>11</b>	<b>0</b>	<b>0</b>
Hopkinton Comm. Center Preschool	Pre-School	18					
ACTUAL Enrollment		18	0	0	18	0	0
% of ACTUAL Enrollment			0%	0%	100%	0%	0%
<b>Total License Capacity</b>			<b>0</b>	<b>0</b>	<b>18</b>	<b>0</b>	<b>0</b>
Parkside Children's House	Preschool	24					
ACTUAL Enrollment		18	0	4	6	8	0
% of ACTUAL Enrollment			0%	22%	33%	45%	0%
<b>Total License Capacity</b>			<b>0</b>	<b>5</b>	<b>8</b>	<b>11</b>	<b>0</b>
Tween School & Home	School Age	50					
ACTUAL Enrollment		41	0	0	0	0	41
% of ACTUAL Enrollment			0%	0%	0%	0%	100%
<b>Total License Capacity</b>			<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>41</b>



Name	Type	Total License Capacity	Infant	Toddler	Pre-school	Kindergarten	School Age
Blu Bear Day Care	Group Child Care Center	12					
ACTUAL Enrollment		12	0	4	6	1	1
% of ACTUAL Enrollment			0%	33%	50%	8.50%	8.50%
<b>Total License Capacity</b>			<b>0</b>	<b>4</b>	<b>6</b>	<b>1</b>	<b>1</b>
Concord Family YMCA After School @ Loudon	School Age	45					
ACTUAL Enrollment		45	0	0	0	0	45
% of ACTUAL Enrollment			0%	0%	0%	0%	100%
<b>Total License Capacity</b>			<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>45</b>
Lady Bees and Butterfrogs	Pre School	12					
ACTUAL Enrollment		13	0	0	13	0	0
% of ACTUAL Enrollment			0%	0%	100%	0%	0%
<b>Total License Capacity</b>			<b>0</b>	<b>0</b>	<b>13</b>	<b>0</b>	<b>0</b>
Little Folks Daycare	Family Child Care	9					
ACTUAL Enrollment		9	2	0	3	1	3
% of ACTUAL Enrollment			22%	0%	33%	11%	33%
<b>Total License Capacity</b>			<b>2</b>	<b>0</b>	<b>3</b>	<b>1</b>	<b>3</b>
Little Lamb Day Care	Family Child Care	9					
ACTUAL Enrollment		13	1	2	1	3	6
% of ACTUAL Enrollment			8%	15%	8%	23%	46%
<b>Total License Capacity</b>			<b>1</b>	<b>1</b>	<b>1</b>	<b>2</b>	<b>4</b>
Concord YMCA @ Loudon	School Age	45					
ACTUAL Enrollment		45	0	0	0	0	45
% of ACTUAL Enrollment			0%	0%	0%	0%	100%
<b>Total License Capacity</b>			<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>45</b>

Name	Type	Total License Capacity	Infant	Toddler	Pre-school	Kindergarten	School Age
First Choice for Children Inc.	Preschool, Child Care Nursery, School Age, Group Child Care Center	61					
ACTUAL Enrollment		52	8	16	17	11	0
% of ACTUAL Enrollment			15%	31%	33%	21%	0%
Total License Capacity			9	19	20	13	0
Animation Station	Child Care Nursery, Preschool, Group Child Care Center, Night Care	112					
ACTUAL Enrollment		75	11	23	27	8	6
% of ACTUAL Enrollment			15%	31%	36%	11%	8%
Total License Capacity			17	34	40	12	9
Children's Center of Attention	Preschool, Child Care Nursery, School Age, Group Child Care Center	72					
ACTUAL Enrollment		55	0	16	16	15	8
% of ACTUAL Enrollment			0%	29%	29%	27%	15%
Total License Capacity			0	21	21	19	11
Concord YMCA Middle School @ 3 Rivers School	School Age	45					
ACTUAL Enrollment		45	0	0	0	0	45
% of ACTUAL Enrollment			0%	0%	0%	0%	100%
Total License Capacity			0	0	0	0	45
Hurney's DC	Group Child Care Center, Child Care Nursery	32					
ACTUAL Enrollment		32	8	8	16	0	0
% of ACTUAL Enrollment			25%	25%	50%	0%	0%
Total License Capacity			8	8	16	0	0

Name	Type	Total License Capacity	Infant	Toddler	Pre-school	Kindergarten	School Age
Institute for Learning	Group Child Care Center, School Age	35					
ACTUAL Enrollment		25	0	0	10	8	7
% of ACTUAL Enrollment			0%	0%	40%	32%	28%
<b>Total License Capacity</b>			<b>0</b>	<b>0</b>	<b>14</b>	<b>11</b>	<b>10</b>
New Morning School @ Pembroke Hill School	School Age	54					
ACTUAL Enrollment		85	0	0	0	0	85
% of ACTUAL Enrollment			0%	0%	0%	0%	100%
<b>Total License Capacity</b>			<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>85</b>
Wonderland Preschool	Pre-School	24					
ACTUAL Enrollment		34	0	0	34	0	0
% of ACTUAL Enrollment			0%	0%	100%	0%	0%
<b>Total License Capacity</b>			<b>0</b>	<b>0</b>	<b>34</b>	<b>0</b>	<b>0</b>
Busy Little Bees	Family Child Care	6					
ACTUAL Enrollment		NA	NA	NA	NA	NA	NA
% of ACTUAL Enrollment			-	-	-	-	-
<b>Total License Capacity</b>			<b>1</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>2</b>
Penacook Community Child Care	Group Child Care Center	90					
ACTUAL Enrollment		52	0	0	28	24	0
% of ACTUAL Enrollment			0%	0%	54%	46%	0%
<b>Total License Capacity</b>			<b>0</b>	<b>0</b>	<b>49</b>	<b>41</b>	<b>0</b>
Penacook Community Center, At Penacook Elementary School	School Age	90					
ACTUAL Enrollment		90	0	0	0	0	90
% of ACTUAL Enrollment			0%	0%	0%	0%	100%
<b>Total License Capacity</b>			<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>90</b>

Name	Type	Total License Capacity	Infant	Toddler	Pre-school	Kindergarten	School Age
Blueberry Express Day Care Center	Group Child Care Center, Child Care Nursery, School Age	56					
ACTUAL Enrollment		51	0	9	12	11	19
% of ACTUAL Enrollment			0%	18%	23.50%	21.50%	37%
<b>Total License Capacity</b>			<b>0</b>	<b>10</b>	<b>13</b>	<b>12</b>	<b>21</b>
Pittsfield Headstart	Preschool	17					
ACTUAL Enrollment		17	0	0	17	0	0
% of ACTUAL Enrollment			0%	0%	100%	0%	0%
<b>Total License Capacity</b>			<b>0</b>	<b>0</b>	<b>17</b>	<b>0</b>	<b>0</b>
Kids with Spirit	School Age	15					
ACTUAL Enrollment		15	0	0	0	0	15
% of ACTUAL Enrollment			0%	0%	0%	0%	100%
<b>Total License Capacity</b>			<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>15</b>
Live Wire Day Care and preschool	Child Care Nursery, Preschool, Group Child Care Center	24					
ACTUAL Enrollment		32	4	6	10	12	0
% of ACTUAL Enrollment			12.50%	19%	31%	37.50%	0%
<b>Total License Capacity</b>			<b>3</b>	<b>5</b>	<b>7</b>	<b>9</b>	<b>0</b>
Kearsarge Children's Center	Pre-School, School Age	38					
ACTUAL Enrollment		50	0	0	10	15	25
% of ACTUAL Enrollment			0%	0%	20%	30%	50%
<b>Total License Capacity</b>			<b>0</b>	<b>0</b>	<b>8</b>	<b>11</b>	<b>19</b>
Warner Cooperative Preschool	Pre-School	20					
ACTUAL Enrollment		20	0	0	20	0	0
% of ACTUAL Enrollment			0%	0%	100%	0%	0%
<b>Total License Capacity</b>			<b>0</b>	<b>0</b>	<b>20</b>	<b>0</b>	<b>0</b>

Name	Type	Total License Capacity	Infant	Toddler	Pre-school	Kindergarten	School Age	
Warner Headstart	Pre-School	17						
ACTUAL Enrollment		17	0	0	17	0	0	
% of ACTUAL Enrollment			0%	0%	100%	0%	0%	
<b>Total License Capacity</b>			<b>0</b>	<b>0</b>	<b>17</b>	<b>0</b>	<b>0</b>	
Care a Lot Daycare	Family Group Child Care	17						
ACTUAL Enrollment		13	0	5	0	0	8	
% of ACTUAL Enrollment			0%	38%	0%	0%	62%	
<b>Total License Capacity</b>			<b>0</b>	<b>6</b>	<b>0</b>	<b>0</b>	<b>11</b>	
Chris' Sunshine FCC	Family Child Care	9						
ACTUAL Enrollment		5	0	3	1	1	0	
% of ACTUAL Enrollment			0%	60%	20%	20%	0%	
<b>Total License Capacity</b>			<b>0</b>	<b>5</b>	<b>2</b>	<b>2</b>	<b>0</b>	
<b>TOTAL PROVIDERS- 96</b>		<b>LICENSED CAPACITY 4,107</b>	<b>Breakdown Based on Total Licensed Capacity</b>					
			236	547	1,222	449	1,662	
			<b>Family Providers</b>					
			29	42	77	26	41	
			<b>Breakdown for School-Age Only Providers</b>					
							1,228	
							<b>(22 providers)</b>	

## APPENDIX J FOOTNOTES

<sup>1</sup> Hardware, and Plumbing and Heating Equipment and Supplies Merchant Wholesalers (NAICS 4237) includes: Hardware Merchant Wholesalers; Plumbing and Heating Equipment and Supplies (Hydronics) Merchant Wholesalers; Warm Air Heating and air-conditioning Equipment and Supplies Merchant Wholesalers; Refrigeration Equipment and Supplies Merchant Wholesalers.

<sup>2</sup> Personal and Laundry Services (NAICS 812) includes: Barber shops; Beauty Salons; Nail Salons; Diet and Weight Reducing Centers; Funeral Homes and Funeral Services; Cemeteries and Crematories; Dry-cleaning and Laundry Services (except Coin-Operated); Pet Care (except Veterinary) Services; and Photofinishing.

<sup>3</sup> SIC 344 Fabricated Structural Metal Products – This industry group includes establishments primarily engaged in fabricating structural metal; manufacturing metal doors, sash, frames, molding, and trim; fabricated plate work (boiler shops); sheet metalwork; architectural and ornamental metalwork; prefabricated metal buildings and components; and in manufacturing miscellaneous structural metalwork.

<sup>4</sup> SIC 331 Steel Works, Blast Furnaces, and Rolling and Finishing Mills – This industry group includes establishments primarily classified as steelworks, blast furnaces (including coke ovens), and rolling mills; establishments primarily engaged in manufacturing electrometallurgical products, except steel; establishments primarily engaged in steel wire drawing and manufacturing steel nails and spikes; manufacturing cold-rolled steel sheet, strip, and bars; and establishments primarily engaged in the manufacture of steel pipe and tubes.

<sup>5</sup> Miscellaneous Services Incidental To Transportation (SIC 478) – Establishments primarily engaged in miscellaneous services associated with transportation, such as packing and crating, fixed facilities, inspection and weighing services, and transportation services, not elsewhere classified.

<sup>6</sup> The Central NH Region includes the following municipalities: Allenstown, Boscawen, Bow, Bradford, Canterbury, Chichester, Concord, Deering, Dunbarton, Epsom, Henniker, Hillsborough, Hopkinton, Loudon, Pembroke, Pittsfield, Salisbury, Sutton, Warner, and Webster.

<sup>7</sup> This report utilizes child care providers that were licensed as of July 2004 for all analysis. The report uses the most recent data available, however much of the data available is prior to 2004, such as market rate survey results, US Census information, and NH Employment Security figures. Because of the nature of the data sets, using different base years does not invalidate the results.

<sup>8</sup> This figure only counts licensed care given within the Central NH Region. It does not take into account license-exempt care and is therefore, a very conservative estimate of total child care capacity in the region.

<sup>9</sup> The New Hampshire Child Care and Early Education Market Rate Survey for 2001; Michael Kalinowski and Fanny Xu; August 2002. These figures do not include Headstart providers who responded to the survey.

<sup>10</sup> Covered employment is employment reported quarterly by employers covered by New Hampshire Unemployment Insurance Law.

<sup>11</sup> Hardware, and Plumbing and Heating Equipment and Supplies Merchant Wholesalers (NAICS 4237) includes: Hardware Merchant Wholesalers; Plumbing and Heating Equipment and Supplies (Hydronics) Merchant Wholesalers; Warm Air Heating and air-conditioning Equipment and Supplies Merchant Wholesalers; Refrigeration Equipment and Supplies Merchant Wholesalers.

<sup>12</sup> NHNetwork; NH Department of Employment Security, [http://www.nhes.state.nh.us/elmi/images/nhnetwork/Labor Market Analysis/Income & Wages/Quarterly Census of Employment and Wages](http://www.nhes.state.nh.us/elmi/images/nhnetwork/Labor%20Market%20Analysis/Income%20&%20Wages/Quarterly%20Census%20of%20Employment%20and%20Wages).

<sup>13</sup> Personal and Laundry Services (NAICS 812) includes: Barber shops; Beauty Salons; Nail Salons; Diet and Weight Reducing Centers; Funeral Homes and Funeral Services; Cemeteries and Crematories; Dry-cleaning and Laundry Services (except Coin-Operated); Pet Care (except Veterinary) Services; and Photofinishing

<sup>14</sup> 2002 NH Occupational Employment & Wages Survey, NH Department of Employment Security, Economic and Labor Market Information Bureau. Figures are based on 40 hour work week, 52 weeks per year using SOC Code 39-9011. Figures are representative for the Concord Labor Market Area.

<sup>15</sup> SIC 344 Fabricated Structural Metal Products – This industry group includes establishments primarily engaged in fabricating structural metal; manufacturing metal doors, sash, frames, molding, and trim; fabricated plate work (boiler shops); sheet metalwork; architectural and ornamental metalwork; prefabricated metal buildings and components; and in manufacturing miscellaneous structural metalwork.

16 SIC 331 Steel Works, Blast Furnaces, and Rolling and Finishing Mills – This industry group includes establishments primarily classified as steelworks, blast furnaces (including coke ovens), and rolling mills; establishments primarily engaged in manufacturing electrometallurgical products, except steel; establishments primarily engaged in steel wire drawing and manufacturing steel nails and spikes; manufacturing cold-rolled steel sheet, strip, and bars; and establishments primarily engaged in the manufacture of steel pipe and tubes.

17 Gross regional product is the total value of goods produced and services provided within the Central NH Region during one year.

18 Miscellaneous Services Incidental To Transportation (SIC 478) – Establishments primarily engaged in miscellaneous services associated with transportation, such as packing and crating, fixed facilities, inspection and weighing services, and transportation services, not elsewhere classified.

19 NH Employment Projections by Industry and Occupations Base Year 2002 to Projected Year 2012 NH Department of Employment Security. October 2004.

20 Child Care in New Hampshire, a Provident National Bank-sponsored survey submitted by Helms & Company, RKM Research and Communications, and Mary Jane Wallner, Fall 1998.

21 Child Care 2000 A Survey of New Hampshire Employers. A Labor Market Information Report. July 2000. NH Employment Security, Economic and Labor Market Information Bureau.

22 Art Rolnick and Rob Grunewald. "Early Childhood Development: Economic Development with a High Public Return" Fedgazette, March 2003. Federal Reserve Bank of Minneapolis

23 This does not take into account other types of income paid to licensed child care providers from governmental or non-profit sources. Thus, the gross receipts are a very conservative estimate.

24 This information was gathered through a telephone survey conducted in July 2004 to all licensed child care providers in the Central NH Region. The survey was to collect the actual number of enrolled children and their age breakdowns. For each provider, the percentage of actual enrolled children by age group was then applied to the licensed capacity for that provider to obtain the Licensed capacity for type of care for each provider, which was then aggregated for the region. If the actual number of enrolled children could not be obtained, the licensed capacity was evenly distributed over the 5 categories. See Appendix I for this information.

25 This is the average fee for care for Younger Preschooler Aged Care (25-35 mo.) and Older Preschool Aged Care (36-59 mo.) as reported in the Market Rate Survey.

26 The 1 staff to every 6 children figure was used to calculate the number of staff.

27 The 1 staff to every 10 children, which is a midway point between 1 staff to every 8 children and 1 staff to every 12 children, figure was used to calculate the number of staff.

28 Using the formula of 1 staff to every 15 children, the actual number of staff is 81. However, since school-age programs are not full-day programs, the staffing required is part-time. 40 staff is the full-time equivalent for school-age programs in the Central NH Region.

29 Estimate of minimum number of staff based on licensing requirements.

30 Covered employment is employment reported quarterly by employers covered by New Hampshire Unemployment Insurance Law.

31 Labor force is estimated by the Local Area Unemployment Statistics program of the Economic and Labor Market Information Bureau of New Hampshire Employment Security.

32 "CPI Inflation Calculator": <http://data.bls.gov/cgi-bin/cpicalc.pl>

33 This figure is estimated proportionally based on Census data available for number of children ages 6-17 – each figure is multiplied by 2/3 to estimate the number of children 6-13.

34 See footnote above for calculation methodology.



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DEVELOPED BY:  
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