



BALTIMORE CITY EARLY CHILDHOOD CARE & EDUCATION

Landscape Analysis

April 2020



Strategic
Thinking for
**SOCIAL
CHANGE**



MARYLAND
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About This Report

The 2020 Baltimore City Early Childhood Landscape Analysis was commissioned by the Family League of Baltimore City to support the work of the Baltimore City Early Childhood Advisory Council (ECAC). The analysis was supported by a grant from the Maryland State Department of Education with funds made available from a federal Preschool Development Planning Grant the State received in 2019.

To conduct the analysis:

- Baltimore Neighborhood Indicators Alliance (BNIA) provided data analysis and geo-mapping drawing from the U.S. Census American Community Survey and other sources.
- Maryland Family Network provided Baltimore City child care availability, capacity, and EXCELS quality rating data from its Maryland LOCATE: Child Care database; interviewed Judy Center staff; and conducted a telephone survey of child care providers in the city.
- Strategic Thinking for Social Change coordinated the project, conducted additional analyses and prepared presentations and drafts for review and discussion.

The bulk of the work took place in late 2019 and early 2020. While much in the world has changed due to the onset of the coronavirus pandemic, study partners hope that the heightened attention brought to the need for quality child care — driven by the requirements of first responders and other essential personnel — alongside the glaring inequities in opportunity, health, and education the COVID-19 crisis has laid bare, will bring additional urgency to filling the gaps and capitalizing on the opportunities identified here.

We extend our thanks to the leadership of the Baltimore City Early Childhood Advisory Council and especially to the chairs and members of its Smart Thinking Workgroup, who were great partners and collaborators. Thanks also to Amy Bopp of the Family League who oversaw the project with patience and good humor and to Waldron Strategies for editing and graphic design.

We are grateful to have been engaged in this important work.

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Baltimore City Early Childhood Care and Education Landscape Analysis was supported by the Preschool Development Grant Birth through Five Initiative (PDG B-5), Grant Number 90TP0064-01-00 from the Office of Child Care, Administration for Children and Families, U.S. Department of Health and Human Services.

Its contents are solely the responsibility of the authors and do not necessarily represent the official views of the Office of Child Care, the Administration for Children and Families, or the U.S. Department of Health and Human Services.

EXECUTIVE SUMMARY

The Baltimore City Early Childhood Landscape Analysis set out to explore key questions about early childhood care in Baltimore that were developed in collaboration with the Baltimore City Early Childhood Advisory Council (ECAC). These questions centered around the demand for such care, the formal network of early care and childhood programs, other programs and services available to the city's youngest children, and gaps and opportunities moving forward.

Key Findings

Number of children ages 0 to 4

There are approximately 41,600 children ages 0 to 4 living in Baltimore. Births are declining overall, led by a decrease in babies born to African American mothers, with particularly high declines in Greenmount East, Southern Park Heights, and Midway/Coldstream. While births citywide decreased by 13% from 2014 to 2018, births to Latina mothers increased as have the number of births in the northwest, southwest, southeast, and northeast areas of the city.

Early care and education availability

As of November 2019, regulated early care and education, including public pre-kindergarten programs, was available for approximately 48% of the city's children under the age of five but only 12% of infants under the age of 2. There are few regulated care options for the growing Hispanic community in the south and southeast areas of the city. Also requiring attention are areas of deep poverty with few or low-capacity pre-kindergarten classrooms.

Early care and education quality as measured by Maryland EXCELS

Sixty-six percent of Baltimore City family child care programs and 40% of center-based child care programs are at Level 1 (the lowest level) in EXCELS — Maryland's quality rating program for early care and education. Another 21% of family programs and 32% of center programs are not currently participating in EXCELS and/or have no published level.

Early care and education affordability

For a typical Baltimore family with two children under the age of 5 and with the median annual income for city households (estimated to be \$58,721 in 2019), child care, food, housing, and taxes — not including additional costs for transportation and essentials like clothing and supplies — take up over 100% of income.

What providers say

Telephone survey responses from 270 child care providers underscore a concern about the availability of care, especially for infants and toddlers, and about affordability for families. Child care providers also offered important perspectives on opportunities to increase school readiness — primarily, they say, through access to an early childhood curriculum and increased parental involvement and support — and on barriers to advancement in the Maryland quality rating system, EXCELS. They emphasized the amount of time required, the cumbersomeness of the process, and the need for additional credentialing, accreditation, training, and support.

Early care and education and school readiness

Based on home address alone, kindergarten readiness as measured by the Maryland Kindergarten Readiness Assessment (KRA) appears to be driven mostly by affluence and is highest in the communities where the city's whitest and least poor families live — school readiness seen as another product of existing inequities. That is part, but not the whole of the story. Recent KRA results presented to the Baltimore City School Board in February of this year do note that kindergarten readiness is highest among children coming from non-public nursery schools (another proxy for affluence), but then followed in order by children who attended City Schools' pre-kindergarten, child care centers, other public pre-kindergarten programs, or attended Head Start. Readiness was lowest in kindergartners who attended a family care setting or were in home or informal care.

Emerging Opportunities

To strengthen and improve the network of early care and education programs available to Baltimore's youngest children, to better support families and providers, and to improve school readiness, Early Childhood Advisory Council members and other stakeholders can work together to:

- Fill gaps in existing care, especially for infants and toddlers and for Hispanic/Latinx families in the south and southeast communities of Baltimore.
- Address affordability for families whose earnings place them above the federal poverty level but below the area median income by expanding the Child Care Scholarship and Head Start — with an emphasis on care for infants and toddlers.
- Pay particular attention to communities of deep poverty where kindergarten enrollment currently exceeds pre-kindergarten enrollment — suggesting unmet demand.
- Maximize and align public programs to ensure a continuum of high-quality care that proceeds from child care settings in families and centers to Head Start and then public pre-kindergarten.
- Address quality and support advancement in EXCELS by developing and providing early childhood curricula, training, funding, and support to providers and developing strategies to increase parental involvement.
- Improve EXCELS by addressing administrative hurdles to provider participation and increasing incentives to advancement, credentialing, and accreditation.
- Prioritize a continued learning and data development agenda to:
 - Better understand school readiness assessment results based on prior care settings.
 - Identify the contribution of other programs and services — beyond formal early care and education programs — to families' wellbeing and to improved outcomes for young children
 - Deepen an understanding of parent and care giver demand for licensed care, especially among populations — such as the city's growing Latinx community — that appear to be underserved.
 - Strengthen ECAC's understanding of the overall experiences and trajectories of the city's youngest children from birth until the time they enter school.

This landscape analysis presents a picture of the world as it existed in February of 2020. In the end, the greatest opportunity before the ECAC is to consider how to emerge from the COVID-19 crisis with greater attention to equity and improved outcomes for the city's youngest children.

“*Many of the things we need can wait. The child cannot. Right now is the time his bones are being formed, his blood is being made, and his senses are being developed. To him we cannot answer 'Tomorrow,' his name is today.*”

— Gabriela Mistral

BALTIMORE CITY EARLY CHILDHOOD CARE AND EDUCATION LANDSCAPE ANALYSIS

Overview

The Baltimore City Early Childhood Landscape Analysis set out to answer four questions developed in collaboration with the Baltimore City Early Childhood Advisory Council (ECAC):

1. How many young people ages 0 to 4 live in Baltimore?
 - What are their demographics?
 - Where do they live?
 - Have the number, demographics, and locations of Baltimore's youngest residents changed over time? If so, how?
2. What is the formal network of early care and education programs (licensed child care, Head Start, pre-kindergarten) available to the city's youngest residents and their families?
 - Where are these programs located?
 - What is their capacity?
 - What is their cost?
3. What other programs and services are available to the city's youngest children and their families?
 - Where are these programs and services located?
 - What do we know about the cost, capacity, quality, and utilization of these programs and services?
4. What can we say about gaps and opportunities moving forward?
 - Are programs and services available and accessible to all children and families who might benefit from them?
 - How are they contributing to the school readiness of young children?
 - Are there opportunities and supports that are missing from the current network of programs and services?

Generated through a literature review, data collection and analysis, geo-mapping, and a telephone survey of child care providers in Baltimore City, information to address most of these questions is presented in the text, tables, maps, and graphs that follow. Some questions remain to be explored, primarily concerning the availability of additional programs and services to families with young children, the demand for care among underserved populations and the relationship of prior care settings to kindergarten readiness. We hope those will be considered more deeply by the ECAC and its Smart Thinking Workgroup as they continue to improve the network of opportunities and supports available to the city's youngest residents.



Examining the Demographics of Baltimore's Young Children

How many children are there? What are their demographics?

The study team used birth records as reported by Maryland Vital Statistics Administration to estimate the number of young people ages 0 to 4 who live in Baltimore. While imperfect — estimates derived from birth records do not account for in- or out-migration — these data are more contemporaneous than the 2010 census and are available for mapping at the neighborhood and census tract level.

- From 2014 to 2018 (the period for which data are currently available), 41,663 babies were born in Baltimore, yielding a rough estimate of the number of young people ages 0 to 4 as of 2018. (See Table 1.)
- 60% of these births were to African American mothers, 26% to white mothers, and 10% to Latina mothers.
- The annual number of births declined by 13% — over 1,100 births — from 2014 to 2018.
- The largest decline (of over 1,000) was in the number of African American births.
- The number of births to Latina mothers increased by 10% over the same period.

Table 1: Births in Baltimore, 2014-2018 (highlights for emphasis)

Year	White/ Caucasian	Black/African American	American Indian	Asian/ Pacific Islander	Latinx/ Hispanic	Other/ Unknown	Total
2018	2023	4469	9	251	872	56	7680
2017	2083	4743	14	246	797	53	7936
2016	2205	5152	16	259	826	68	8526
2015	2247	5281	13	292	806	19	8658
2014	2273	5472	27	283	793	15	8863
Total	10831	25117	79	1331	4094		41663
Average	2166	5023	16	266	818		8333
Change 2014- 2018	-250	-1003	-18	-32	79		-1183
% Change 2014- 2018	-11%	-18%	-67%	-11%	10%		-13%
% All Births	26%	60%	0%	3%	10%		

Source: Maryland Vital Statistics, Annual Reports 2014, 2015, 2016, 2017, and 2018. Table 9 A.

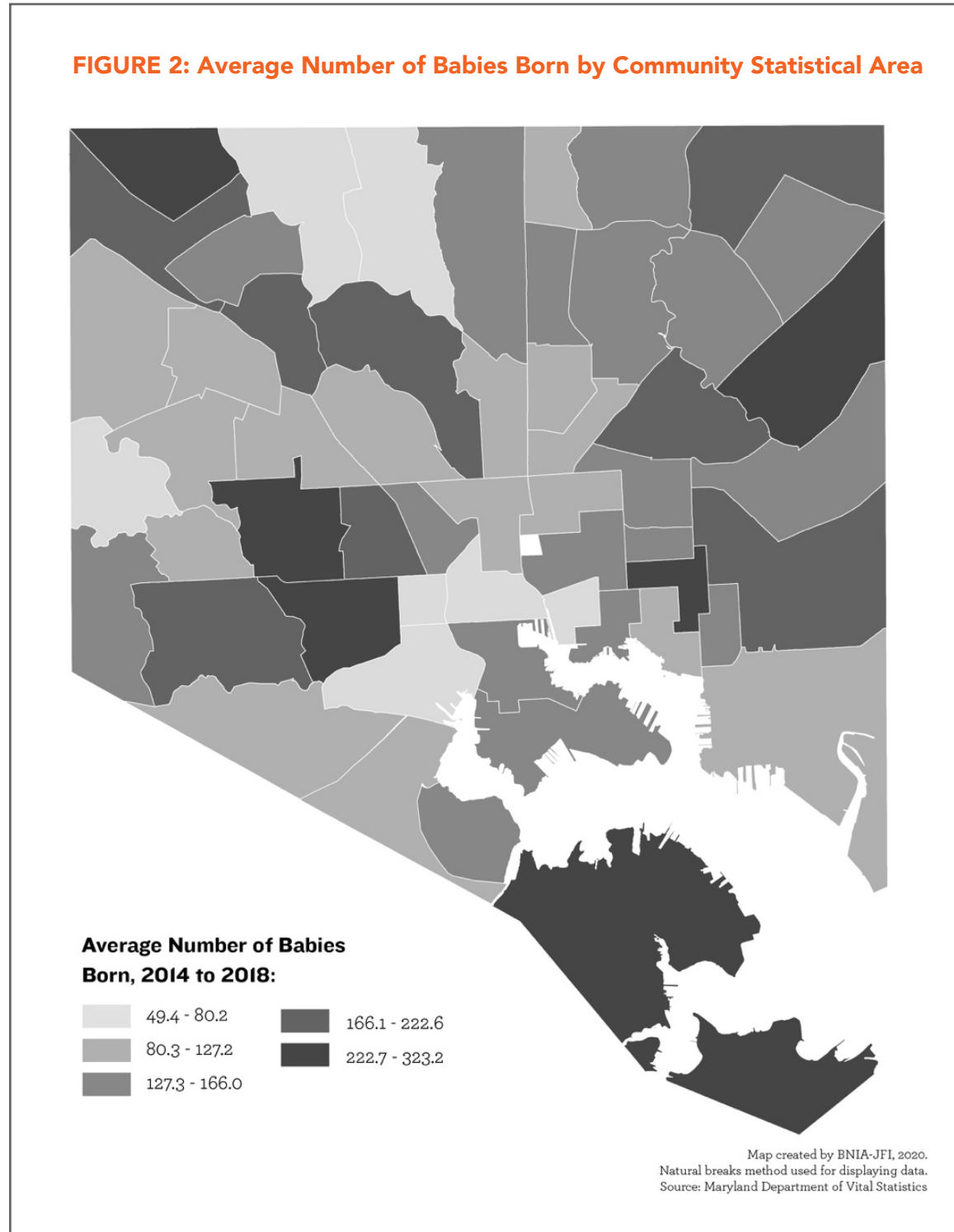
Where do youngest residents live?

To understand *where* babies are being born in Baltimore, and to look at changes in the geography of births over time, the Baltimore Neighborhood Indicators Alliance (BNIA) used data from the Maryland Vital Statistics Administration to map births across Baltimore's 55 Community Statistical Areas (CSAs).¹ Figure 1 is a map of Baltimore's CSAs.

FIGURE 1: Baltimore City Community Statistical Areas (CSAs)



Figure 2 shows the average annual number of births in Baltimore between 2014 and 2018 by CSA.



The largest numbers of babies born in Baltimore are found in CSAs to the northwest, northeast, south, and then directly to the west and east of the city's center. Table 2 notes the 10 CSAs with the greatest number of births from 2014 to 2018. A table of all births by CSA is included as Appendix A.

Table 2: Births by CSA, 2014-2018 (Top 10, ranked by total number of births)

Community Statistical Area	All Births (2014-2018)
Cedonia/Frankford	1616
Cross-Country/Cheswolde	1524
Patterson Park North & East	1449
Brooklyn/Curtis Bay/Hawkins Point	1335
Southwest Baltimore	1265
Greater Rosemont	1240
Orangeville/East Highlandtown	1113
Medfield/Hampden/Woodberry/Remington	1111
Harford/Echodale	1084
Belair-Edison	1051

Source: Maryland Vital Statistics 2014-2018 as analyzed by the Baltimore Neighborhood Indicators Alliance



Have there been changes in the geography of births over the last five years?

BNIA also calculated the percentage change in births from 2014 to 2018 by CSA. Table 3 summarizes this analysis by presenting the five CSAs with the largest percentage decrease in births and then the five CSAs with the largest percentage increase in births. The full analysis is included as Appendix B.

Table 3: Neighborhood Change in Births, 2014-2018: Greatest Decreases and Increases by CSA

Community Statistical Area	Average # of Births	Percent Change in # of Births
Decreases		
Harbor East/Little Italy	70	-44.3%
Greenmount East	120	-34.9%
Southern Park Heights	188	-32.7%
Midway/Coldstream	124	-30.3%
Increases		
Harford/Echodale	217	5.2%
Brooklyn/Curtis Bay/Hawkins Point	267	7.7%
South Baltimore	140	8.7%
Morrell Park/Violetville	122	10.2%
Cross-Country/Cheswolde	305	12.7%

Source: Maryland Vital Statistics 2014-2018 as analyzed by the Baltimore Neighborhood Indicators Alliance

In sum, there are approximately 41,600 children ages 0-4 living in Baltimore. Births are declining overall, led by a decrease in babies born to African American mothers, with particularly high declines in Greenmount East, Southern Park Heights and Midway/Coldstream. Harbor East/Little Italy, which is the site of significant commercial real estate development, has also experienced a large percentage decline in births, though numbers of births there were small to begin with. While births citywide decreased by 13% from 2014 to 2018, births to Latina mothers increased as have the number of births in the northwest, south, southeast, and northeast areas of the city.

Availability of Early Care and Education

The Maryland Family Network (MFN) operates LOCATE: Child Care, a resource and referral network for families seeking child care, and maintains a database of all licensed family and center-based programs that includes program location, capacity, costs, and information about whether programs participate in the Maryland child care quality rating system, Maryland EXCELS. LOCATE also has information on all Head Start and Early Head Start programs. The study team combined data from LOCATE for Baltimore City child care programs along with information on the location and capacity of pre-kindergarten classrooms from Baltimore City Public Schools (City Schools). When taken together and adjusted with a multiplier for the percentage used by children under age 5, as of November 2019,^{2,3} there were close to 20,000 available early care and education slots in Baltimore. (See Table 4.)

Table 4. Estimated Early Care and Education Slots for Children 0-4 in Baltimore City (as of November 2019)

Early Care and Education Setting	Number of Programs	Capacity
Licensed Family Care	493	3779
Licensed Group Care (inclusive of Head Start)	289	15,555
Subtotal		19,334
**Estimate for below age 5 (subtotal* 80%)		15,467
Pre-K Classrooms (capacity at 20 students each)	224	4480
Estimated Total Capacity ECE		19,947

Source: Maryland Family Network, LOCATE: Child Care, November 2019 and Baltimore City Public Schools, Pre-K Classrooms, 2019-2020. Compilation by author.

Table 5 breaks out from this total the estimated number of slots that are licensed specifically for the care of infants (children up to 23-months-old).

Table 5. Estimated Early Care and Education Slots for Infants in Baltimore City (as of November 2019)

Early Care and Education Setting	Capacity for Infants (0-23 months)
Licensed Family Care	957
Licensed Group Care (inclusive of Head Start)	889
Estimated Infant Capacity	1846

Source: Maryland Family Network, LOCATE: Child Care, November 2019

When measured against population estimates derived from birth records, as of November 2019, regulated early care and education program slots were available for approximately 48% of the city's children under the age of 5 and 12% of infants under the age of 2.⁴

Table 6. Estimated Coverage of Early Care and Education by Population (as of November 2019)

Population	Estimate	Early Care and Education Capacity Estimate	Coverage
Children 0-4	41,663	19,947	48%
Infants (2018 births x 2) ⁵	15,360	1,846	12%

Sources: Maryland Vital Statistics and LOCATE: Child Care. Estimates by author.

Participation in the Maryland EXCELS Quality Rating Program

The Maryland State Department of Education (MSDE) developed the Maryland EXCELS (Excellence Counts in Early Learning and School Age Care) rating system for child care programs to support and promote high-quality care, particularly for low-income families.⁶

The rating system is voluntary, is in addition to state licensing requirements and inspections, and is intended to cover all child care and public pre-kindergarten settings. Participating providers are ranked on a scale of one to five (with five being the highest) based on the "core disciplines" of:

- Compliance
- Professional Development
- Accreditation
- Developmentally Appropriate Activities
- Administrative Practices⁷

On top of meeting state licensing requirements, programs at EXCELS Level 1 have demonstrated certain key requirements, including that they have annual parent-child meetings and are willing to participate in quality ranking and self-improvement. They are then eligible for participation in the Maryland Child Care Scholarship program (formerly known as the Child Care Voucher program), which provides state and federal funds for the care of children from low-income working families. As programs demonstrate additional competencies such as having credentialed staff, program accreditation, the use of high-quality learning materials, and developmentally appropriate activities, they can apply for advancement in the ratings. (See Appendix G for a copy of the public information fact sheet on EXCELS.)

EXCELS ratings are made available to families seeking child care and are recorded in the Maryland LOCATE database. Tables 7 and 8 note the EXCELS levels for family and center-based care programs in Baltimore as recorded in LOCATE.

Table 7. Baltimore City Family Child Care Programs and Capacity by EXCELS Level

Excels Level	Family Programs		Capacity	
	Number	% of Programs	Number	% of Total Capacity
Level 1	324	66%	2510	66%
Level 2	28	6%	214	6%
Level 3	30	6%	236	6%
Level 4	1	0%	7	0%
Level 5	4	1%	32	1%
No published level	106	22%	780	21%
Total	493		3779	

Table 8. Baltimore City Center Child Care Programs and Capacity by EXCELS Level

Excels Level	Group Programs (including Head Start)		Capacity	
	Number	%	Number	%
Level 1	139	48%	6155	40%
Level 2	25	9%	1315	8%
Level 3	42	15%	2215	14%
Level 4	2	1%	186	1%
Level 5	8	3%	734	5%
No published level	73	25%	4950	32%
Total	289		15,555	

Sixty-six percent of Baltimore City family child care programs and 40% of center-based child care programs are at Level 1 in EXCELS. Another 21% of family programs and 32% of center programs are not currently participating in EXCELS and/or have no published level. The next highest percentage of programs — 14% of center-based programs — are at EXCELS Level 3. Four family programs (1%) and eight center programs (5%) are at EXCELS Level 5.

In presenting these findings to ECAC and other stakeholders, much discussion has ensued about the degree to which EXCELS serves as a true measure of program quality. ECAC members report that many providers initially participated in the quality rating system to achieve a Level 1 to be eligible for the Maryland Child Care Scholarship program but have not pursued further advancement.

On the one hand, participation and advancement in EXCELS is understood by stakeholders to be more a reflection of provider interest and administrative capacity rather than an accurate measure of child care quality. On the other hand, Maryland policymakers at MSDE and in the legislature have committed to the system as a means for allocating resources and guiding the scale-up of early care and education for low-income children across the state.⁸ How these positions are reconciled remains to be seen. (More on providers' perspectives on EXCELS is included below, along with the results of MFN's telephone survey.)

Geographic Distribution of Early Care and Education

To get a picture of the geographic distribution of early care and education programs across the city, BNIA mapped data from LOCATE and City Schools over the average number of births from 2014 to 2018. In Figure 3, family and center-based child care programs are differentiated by icons — squares represent center-based programs, circles represent family-based programs, and triangles represent pre-kindergarten classrooms. Icons are sized according to program capacity and colored based on EXCELS ranking. The base map of average annual births is the same as the base map previously displayed in Figure 2. Some caveats about the data presented in this map and the ones that follow:

- Program location, capacity, and EXCELS rating data were pulled in November 2019 and do not reflect any changes since then. This is particularly important to keep in mind as providers and families deal with any impact from COVID-related program closures and employment and revenue losses.
- Programs not participating in EXCELS and/or without an EXCELS ranking, other than public pre-kindergarten classrooms, are not represented in these maps.
- Informal or unlicensed care settings are also not included.
- It is not wholly accurate to associate program location with residential geography as a measure of the utilization of care. Families often travel outside their neighborhoods to seek care for their children.

Nevertheless, these are the best data available to give us a sense of how regulated early care and education settings are distributed across the city's neighborhoods, communities, and families.

FIGURE 3: Early Care and Education by EXCELS Rating and Capacity and Average Numbers of Babies Born

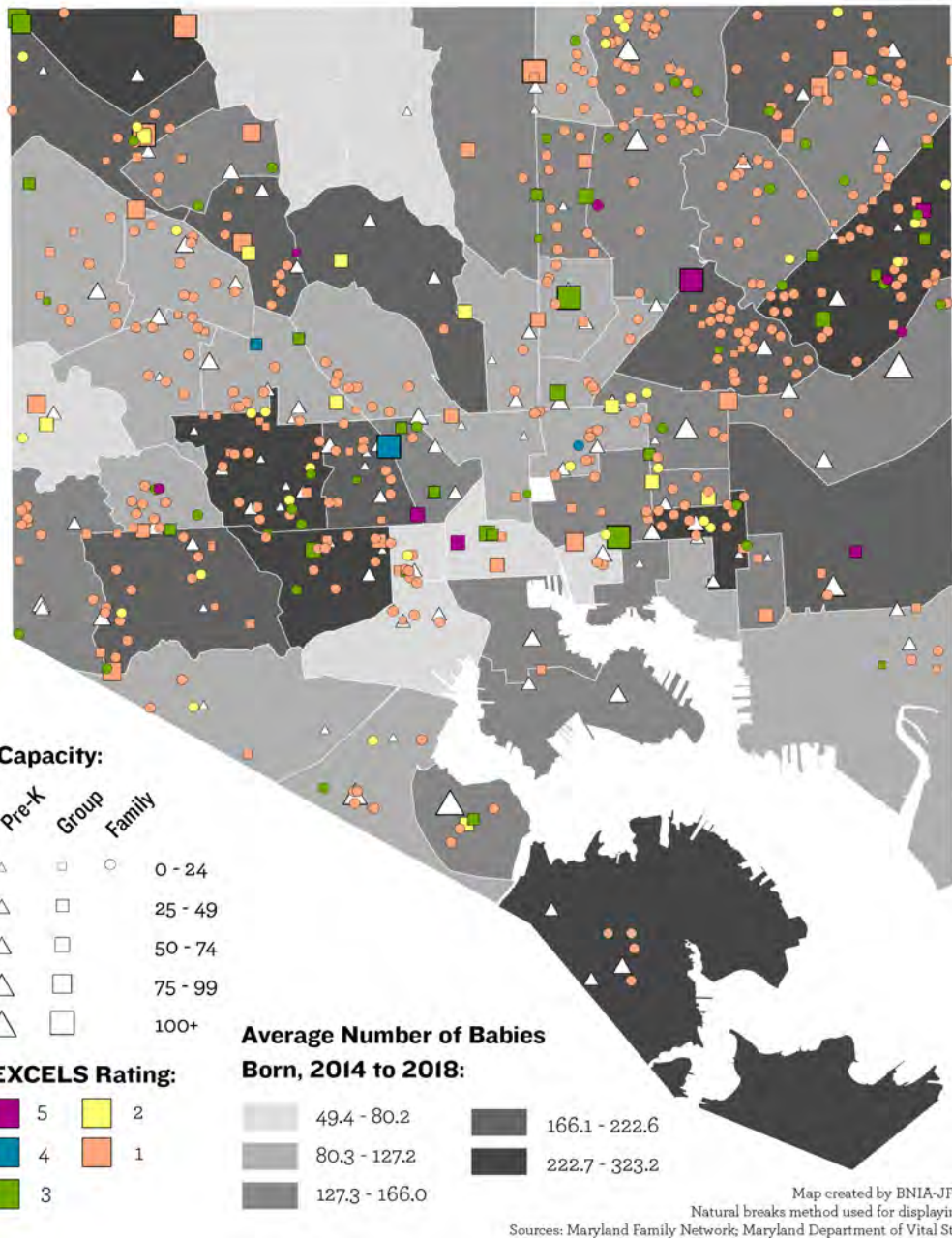
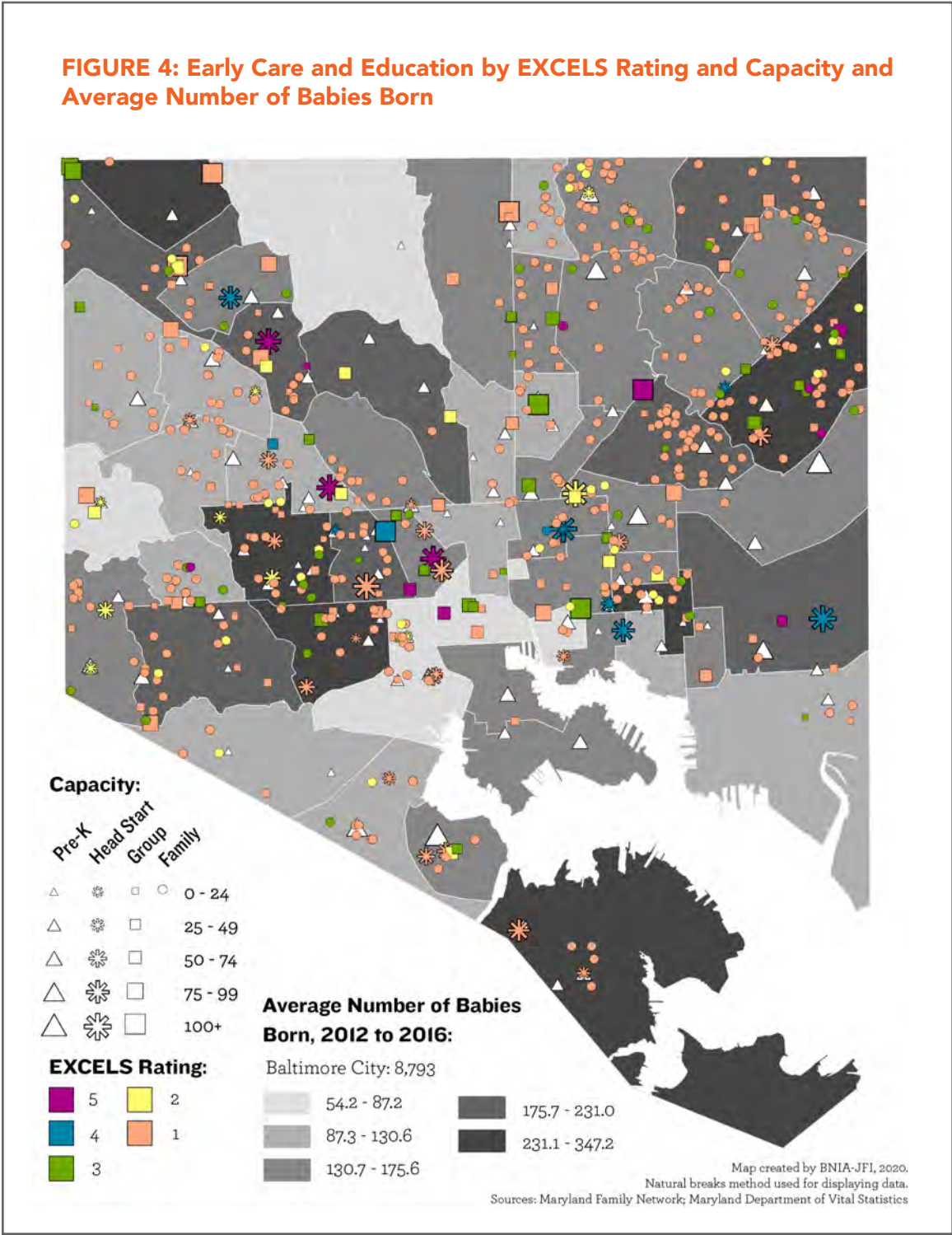


Figure 4 adds Head Start programs to the map (represented by an asterisk) and changes the base to the average number of babies born between 2012 and 2016.⁹ (Note that though the years change, the shading of the base map of CSAs does not. The geographic concentration of births remains the same across the two time periods).

FIGURE 4: Early Care and Education by EXCELS Rating and Capacity and Average Number of Babies Born





Apparent in both Figures 3 and 4 is the large number of programs at EXCELS Level 1 and a relative lack of available licensed care in several CSAs with high concentrations of young children: notably Cross Country/Cheswolde and Brooklyn/Curtis Bay/Hawkins Point — where the average annual number of babies born over the five-year period from 2012 to 2016 was greater than 230; and in Medfield/Hampden/Remington and Orangeville/Highlandtown, where the average annual number of babies born was 175 to 230.

In discussions of these findings, ECAC members noted the growing number of Orthodox Jewish families in the northwest corner of the city (in Cross Country/Cheswolde) and Hispanic/Latinx families in the south and southeast (Orangeville/Highlandtown and Brooklyn/Curtis Bay/Hawkins Point) and suggest a renewed examination of the need for early care and education among these families.

Distribution of Early Care and Education by Race, Ethnicity, and Percent of Children in Poverty

In looking at the availability of early care and education by the geography of race, ethnicity, and poverty in the city, further patterns emerge. Figures 5, 6, 7, and 8 use the most currently available data from the U.S. Census American Community Survey to map the availability of care over the percentage of the population that is African American (Figure 5), White (Figure 6), Hispanic (Figure 7), and the percent of children in poverty (Figure 8).

FIGURE 5: Early Care and Education by EXCELS Rating and Capacity and Percent of Residents that are Black/African-American

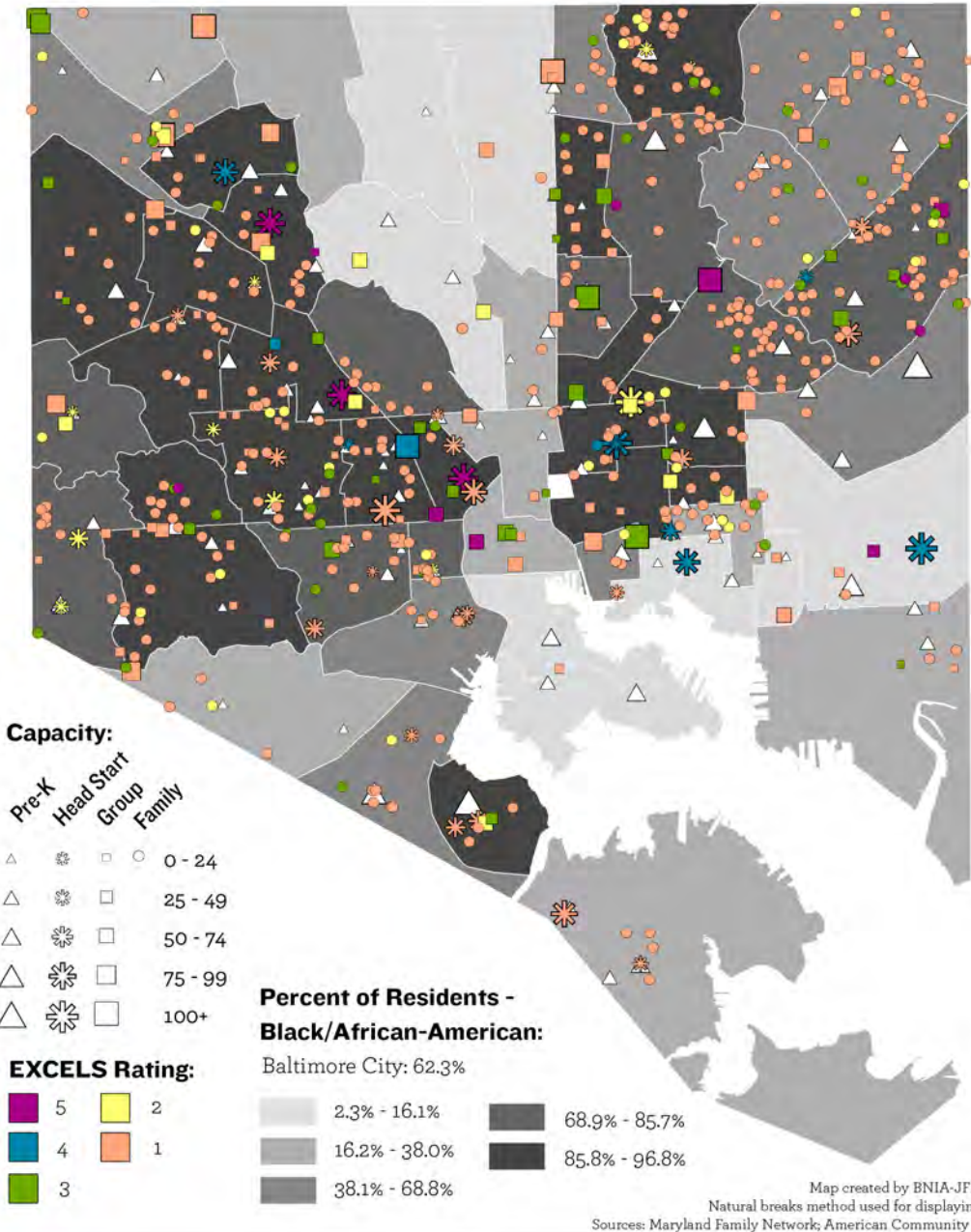


FIGURE 6: Early Care and Education by EXCELS Rating and Capacity and Percent of Residents that are White/Caucasian

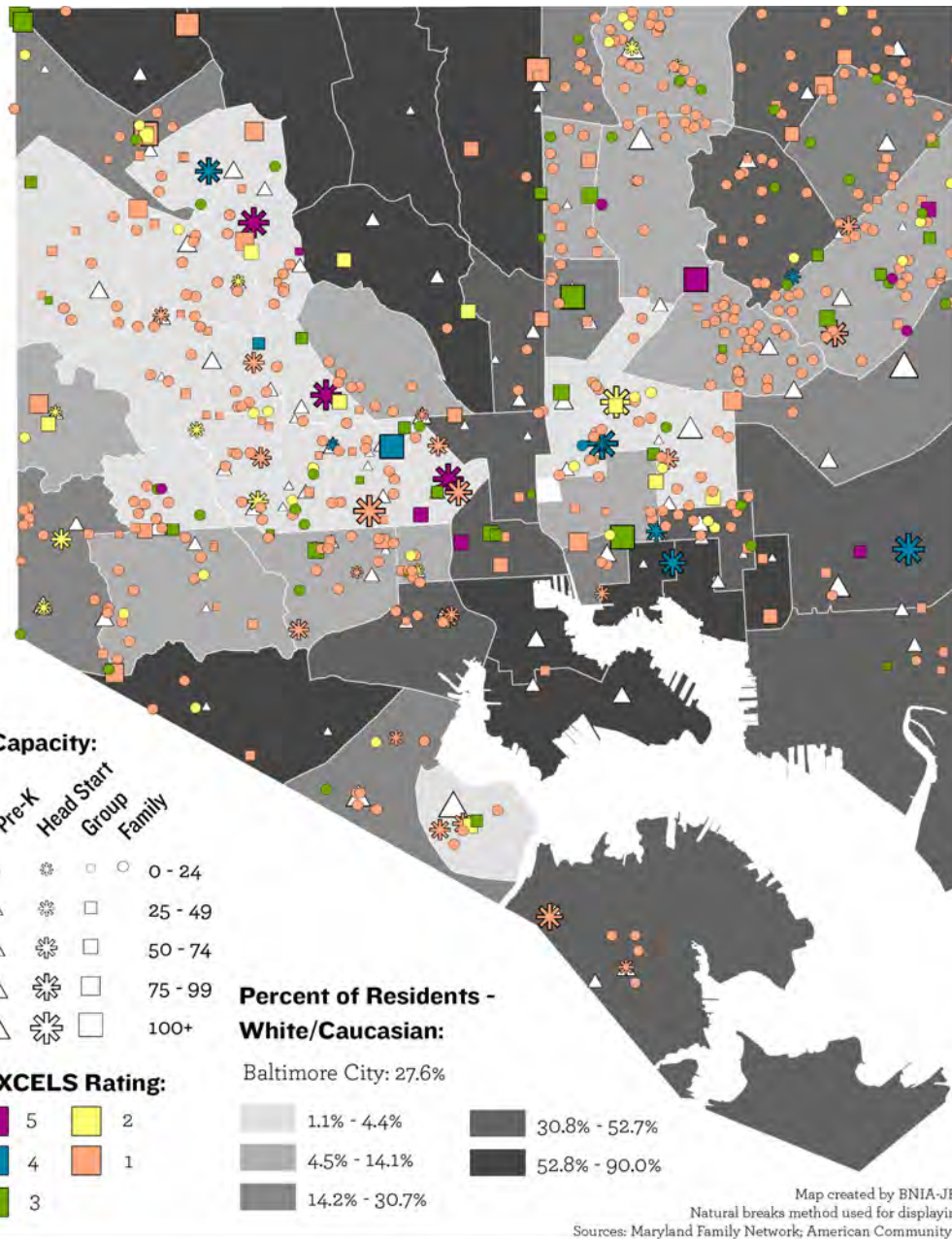


FIGURE 7: Early Care and Education by EXCELS Rating and Capacity and Percent of Residents that are Hispanic

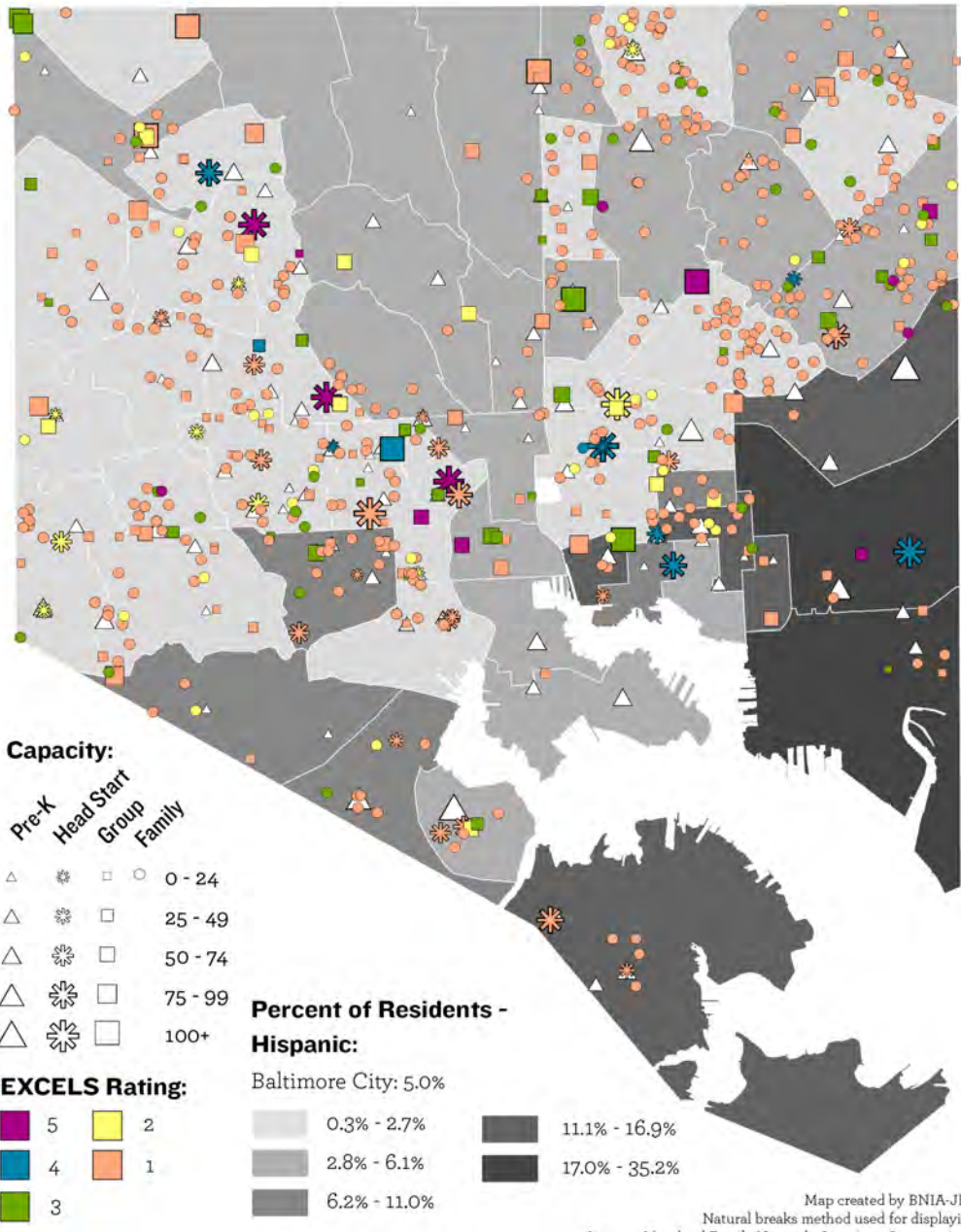
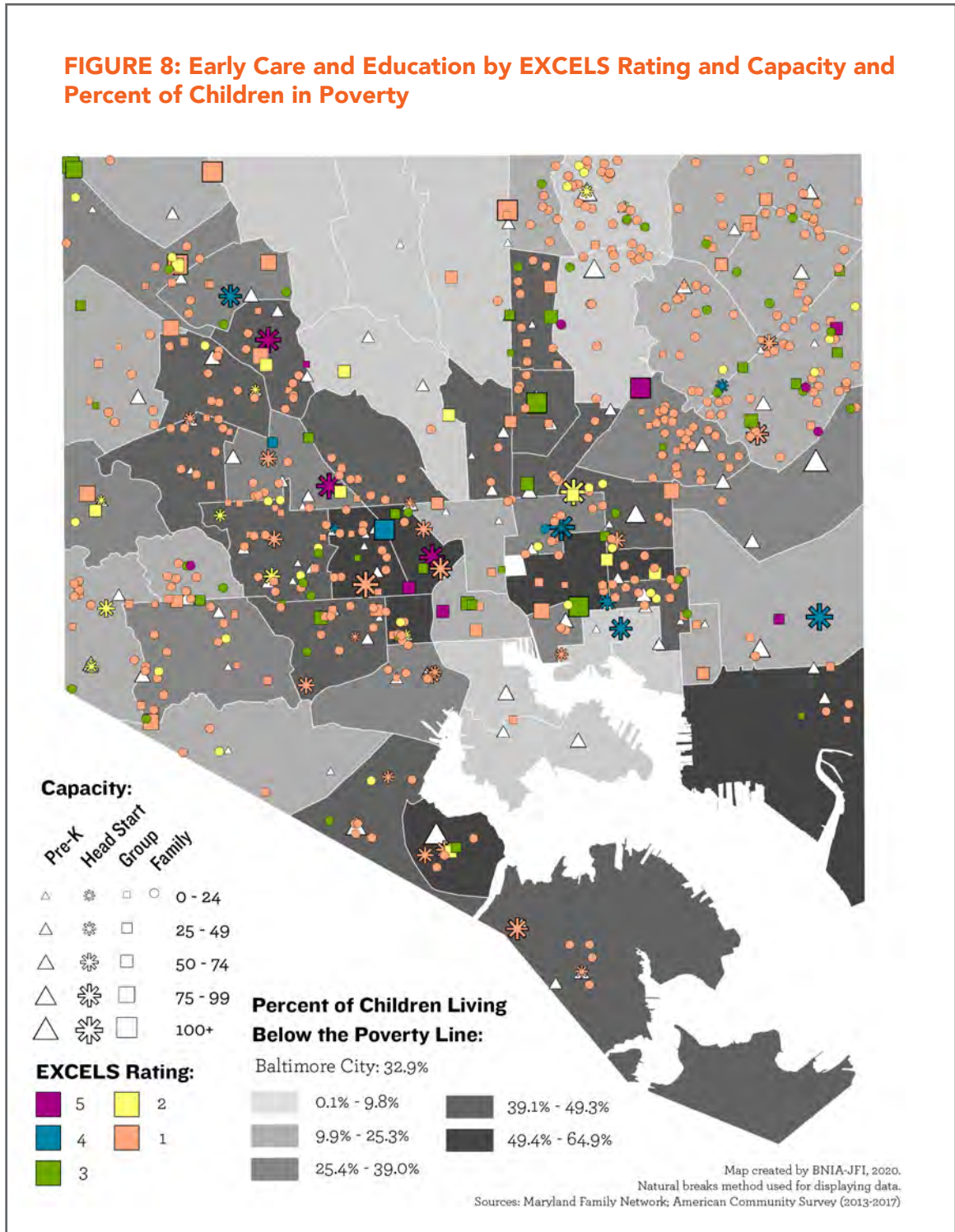


FIGURE 8: Early Care and Education by EXCELS Rating and Capacity and Percent of Children in Poverty



In these maps, stark patterns of racial and economic segregation — consistent with our city's history — emerge. Professor Lawrence Brown, formerly of Morgan State University and now at the University of Wisconsin in Madison, coined the terms “White L” and “Black Butterfly” to describe the predominately white and relatively wealthy neighborhoods along the Charles Street corridor and ringing the Inner Harbor and then the predominately African American and less affluent neighborhoods that spread out to the east and west of the city's core — a legacy of segregationist housing and lending policies that persist into the present.¹⁰ Added to this historic geography is the emergence of Hispanic/Latinx neighborhoods to the south and southeast.

Areas of deep poverty — where 50% or more of children under the age of 18 live below the Federal Poverty Level — are found to the east and west of downtown and in southeast and southwest. When overlaid with the availability of early care and education programs:

- There is an apparent lack of regulated care within the White L where families may depend on a combination of private in-home care and private nursery schools not reflected in the EXCELS data or on the larger private center-based child care programs around downtown.
- Several small, family-based providers at EXCELS Level 1 serve the predominately African American communities of the Black Butterfly — interspersed with some highly-ranked child care centers, both Head Start and others.
- There are few regulated care options for the growing Hispanic community in the south and southeast.
- Particular attention should be paid to areas of deep poverty with few or low-capacity pre-kindergarten classrooms.¹¹ From the analysis here, these appear in:
 - Brooklyn/Curtis Bay/Hawkins Point in the south;
 - Southeastern;
 - Upton/Druid Heights; Sandtown Winchester/Harlem Park; Poppleton/The Terraces/ Hollins Market on the west side; and
 - Oldtown/Middle East and Madison/East End on the east side.

Appendix C includes a map showing the location of Baltimore City elementary schools overlaying data about communities' percentage of children in poverty as an additional reference.

Appendix D provides a further analysis of pre-kindergarten enrollment as a percentage of kindergarten enrollment for the school year 2016-2017 (the most current year for which BNIA has data), and then orders CSAs by the percentage of children in poverty. Though this analysis should be updated with current year data, Upton/Druid Heights; Poppleton/The Terraces/Hollins Market; and Oldtown/Middle East again emerge as areas with high concentrations of children in poverty (at above 50%) and relatively low pre-kindergarten enrollment (at less than 65% of kindergarten enrollment).

How Affordable is Early Care and Education?

MFN collects information on the cost of care as part of its LOCATE Child Care service and includes it as a data point in annual reports on child care availability prepared for each jurisdiction in Maryland. Table 9 presents Baltimore City cost data for family and center-based care for infants and children 2 to 4 years of age.¹²

Table 9. Average Weekly Cost of Care

Average Weekly Cost of Care in Baltimore City, 2019		
	Family Care	Center Care
0-23 months	\$178	\$272
2-4 years	\$145	\$188

Source: Maryland Family Network, *Child Care Demographics 2020: Baltimore City*

MFN goes further in its 2020 Child Care Demographics Report to estimate the annual cost of child care for a family with two children — one an infant and one a preschooler — whose earnings place them at the median annual income of city families. Figure 9 is taken directly from this report and provides an estimated annual household budget for this typical family. Child care, food, housing, and taxes — not including additional costs for transportation and other essentials like clothing and supplies — take up over 100% of this family's income.

FIGURE 9: Child Care Costs as Compared to Other Major Household Expenses

The estimated current median family income in Baltimore City is \$58,095^a. A family of four that included a couple and two children ages 0-23 months and 2-4 years can be expected to have the following yearly household expenses:

Expense	Cost	% of Income
Child Care	\$19,028	32.8%
Infant ^b	\$9,276	
Preschooler ^c	\$9,752	
Food ^d	\$10,674	18.4%
Housing ^e	\$16,716	28.8%
Taxes ^f	\$12,303	21.2%
Total	\$58,721	101.2%

^a Current income as shown in the Geolytics Report dated July 2019. This data cannot be compared to previous data. ^b Average cost of full-time care in a family child care home (LOCATE, 2019). ^c Average cost of full-time care in a child care center (LOCATE, 2019). ^d National average cost of food at home based on a moderate cost plan (Cost of Food at Home Estimated for Food Plans at Four Cost Level, July 2019, U.S. Average, United State Department of Agriculture). ^e Based on U.S. Bureau of the Census 2010 median selected owner costs with a mortgage; included mortgage, taxes, insurance, and utilities. ^f State and local taxes per Comptroller of Maryland (2019), Medicare and FICA taxes per moneychimp.com (2019). Taxes do not reflect Earned Income Credit.

Source: Maryland Family Network, *Child Care Demographics 2020: Baltimore City*

Table 10 displays updated data from the American Community Survey on the percentage of Baltimore City Families that fall within income bands at increments of \$10,000. From Figure 9, we see that child care is barely affordable for families at the median annual income. Table 10 reminds us that 50% of the city's families fall below the median.

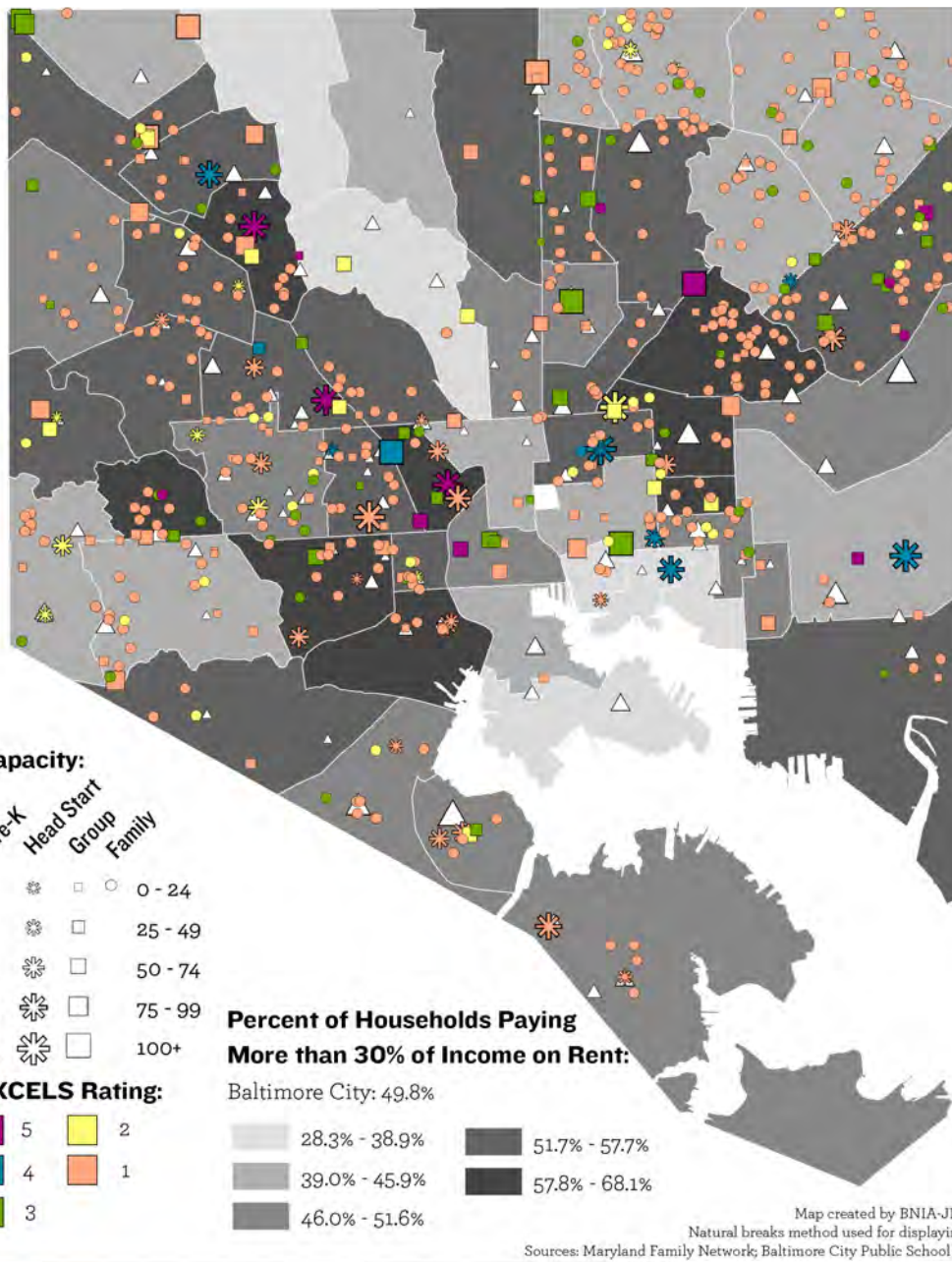
Table 10. Annual Median Income of Baltimore City Families (2013-2017)

Annual Income and Benefits	Percent of Families (n=123,385)	Cumulative Percent of Families
Less than \$10,000	8%	8%
\$10,000 to \$14,999	5%	13%
\$15,000 to \$24,999	9%	22%
\$25,000 to \$34,999	10%	32%
\$35,000 to \$49,999	13%	45%
\$50,000 to \$74,999	17%	62%
\$75,000 to \$99,999	12%	75%
\$100,000 to \$149,999	13%	88%
\$150,000 to \$199,999	6%	93%
\$200,000 or more	7%	100%

Source: U.S. Census American Community Survey, *Income and Poverty*, five-year average for Baltimore City, 2013-2017.

BNIA has provided another way to think about where families might be under particular stress in covering the costs of child care. In Figure 10, child care and pre-kindergarten availability is mapped over the percentage of families who are paying more than 30% of their annual income in rent. Different than the map displaying the concentration of children in poverty (Figure 8), this brings to the fore the CSAs of Southern Park Heights, Edmondson Village, Southwest, and Washington Village/Pigtown on the westside and Clifton Berea, Belair-Edison, and Greenmount East on the eastside as areas where families are facing financial stress due to housing costs.

FIGURE 10: Early Care and Education by EXCELS Rating and Capacity and Rental Affordability



Free and subsidized early care and education opportunities are available to families in the city. Table 11 describes eligibility for the Maryland Child Care Scholarship Program, Head Start, and pre-kindergarten in City Schools and then estimates the current capacity of these programs.

Table 11. Free and Subsidized Early Care and Education in Baltimore, 2019-2020

Program	Eligibility	Estimated Capacity, 2019-2020
Maryland Child Care Scholarship Program (CCS) voucher/ subsidy for child care)	Children in families with annual incomes up to \$77,000 for a family of four	3335 ¹³
Baltimore City Head Start	Children, 0-5, in families with incomes up to 130% of the Federal Poverty Level (estimated \$33,410 for a family of four) or who receive TANF, SSI or are in Foster Care	2980 (Head Start capacity from LOCATE)
Baltimore City Public Schools Pre-kindergarten	Priority given to homeless and low-income f4-year-olds (annual income up to \$44,955 for a family of four) and 3-year-olds as space allows	4480 (current pre-k capacity from City Schools)
Total Estimated Subsidized ECE		10,795

Sources: LOCATE: Child Care, Baltimore City 2020 Child care Demographic Report, Baltimore City Schools. NB: Federal Poverty Level for 2019 is \$25,700 for a family of four. Compilation by author.

Though crude at best, we estimate that early care and education opportunities are available for 78.5 percent of young children living at the poverty level or below. Our estimate (in Table 12) assumes all free and subsidized capacity goes to these children, not addressing the needs of children in the 23% of city families whose incomes are above the Federal Poverty Level but below the median or would qualify for these programs on criterion other than income.¹⁴

Table 12. Estimated Coverage for Children in Poverty

Population	Estimate	% Children in Poverty ¹⁵	Estimated Children 0-4 in Poverty (100% FPL)	Revised Capacity (CCS, Head Start, Pre-K)	Coverage
Children 0-4	41,663	33%	13,749	10,795	78.5%

How Else Might We Think About Gaps in Available Care?

Thus far, we've identified gaps in care for infants, for Hispanic families, for children in high-poverty areas, and in families whose annual incomes are above the Federal Poverty Level, but below the median. Tables 13 and 14 take a further look at gaps by estimating child care demand based on the percentage of mothers in the workforce (Table 13) and then by "quality" as determined by EXCELS ratings (Table 14).

Using the estimate of workforce participation of 72% of mothers in Baltimore as a multiplier, coverage extends to 66% of all children under 5 and 17% of infants. Early care and education availability at an EXCELS Level 3 or greater — not including public pre-kindergarten — extends to 8% of children under 5 and 3% of infants. When demand is adjusted for working mothers, "quality" care extends to 11% of children under 5 and 4% of infants.

Table 13. Child Care Coverage by Estimated Demand

Population	Estimate	% of Mothers in Workforce ¹⁶ (estimate)	Revised Demand	Capacity Estimate	Coverage
Children 0-4	41,663	72%	29,997	19,947	66%
Infants (2018 x 2)	15,360		11,059	1846	17%

Table 14. Child Care Coverage at "Quality" and by Demand

Population	Estimate	Capacity	Capacity at EXCELS 3 or Greater	Coverage at "Quality"	Coverage at "Quality" w/ Workforce Demand
Children 0-4	41,663	19,947	3410	8%	11%
Infants (2018 x 2)	15,360	1846	490	3%	4%

What Do Providers Say about Child Care Availability and Quality?

To complement and complete our analysis of the landscape of early care and education available in Baltimore, MFN conducted a phone survey of family and center-based child care providers. In February 2020, calls were made to all Baltimore providers in the LOCATE database. Providers were given the option of responding over the phone at the time of the initial call, at a scheduled follow up time or via email. Survey responses were received from 270 providers for an overall response rate of 35%. Respondents represent all city zip codes and include both family and center-based care providers. See Appendix E for more detail.

Highlighted here are responses to a series of questions that were added to the survey in consultation with the Baltimore City ECAC.

- The primary language spoken by caregivers is English (83% of family providers and 100% of group providers). A small percentage (11%) of family providers use Spanish as their primary language.
- The majority of respondents — both family (95%) and center (84%) — accept the Child Care Scholarship.
- Providers report that families find out about available care primarily by word of mouth and referrals from friends and family.

The survey also posed a series of open-ended questions designed to shed light on key issues identified by the ECAC: school readiness, the availability of care, and participation in the EXCELS rating program. Responses to these questions were recorded as given and then categorized based on broad themes.

On the question of what would help most to improve the school readiness of children, a curriculum for early care and education was mentioned most frequently by both center and family providers. Parental support and involvement, materials and supplies, funding, training, and computers round out the responses (Table 15).

Table 15. What would be most helpful to improve the school readiness of children in your care? (percent of responses, one response given, top five responses shown)

Group Providers (n=57)		Family Providers (n=158)	
Curriculum	14%	Curriculum or related educational enhancements and routines	37%
Parent Support/ Participation	12%	Books/Materials/ Supplies	12%
Funding	9%	Parent Involvement	11%
Training	9%	Computers	10%
Computers/Electronics	7%	Funding and Support	9%

On the question of what is missing from the landscape of early care and education in the city, providers cited the need for more centers and Head Start, care for infants and toddlers, increased affordability for families, and funding and support for providers — though fewer responses were received to this question so care should be taken in interpretation (Table 16).

Table 16. What (if anything) is Missing in Early Care and Education? (percent of responses, one response given, top responses shown)

Group Providers (n=19)		Family Providers (n=33)	
Availability of Care (more centers, Head Start, other providers)	32%	Availability of Care (more centers, Head Start, other providers)	33%
Infant/Toddler Care	26%	Infant/ Toddler Care	18%
Funding and Support for Network of Providers	16%	Funding for Families and Providers	18%
Affordable Care for Families	11%	Community Activities for Children (Rec Centers, After School Programs)	12%
Qualified Staff	11%		

A significant number of group provider responses to a question about barriers to advancement in EXCELS cited the amount of time required to take part, administrative hurdles like paperwork and barriers arising from needed credentials, accreditation, training, and staff turnover. Family providers also emphasized the time required as a significant barrier to advancement and noted that the process is cumbersome and difficult to navigate (Table 17).

Table 17. What, if any, barriers have you faced in EXCELS? (percent of responses, one response given, top responses shown)

Group Providers (n=51)		Family Providers (n=158)	
Time	27%	Time	41%
Need Credentials/ Accreditation	20%	Process is cumbersome (is confusing, keeps changing, is hard to navigate)	11%
Turnover	10%	Working on it	9%
Process is cumbersome (too much paperwork)	8%	Need help/ more information	6%
Training	8%	Need Credentials/ Accreditation	4%

Survey responses from child care providers are consistent with other findings from the data analysis and mapping presented here and underscore a concern about the availability of care, especially for infants and toddlers, and about affordability for families. Child care providers also offered important perspectives on opportunities to increase school readiness — primarily, they say, through access to an early childhood curriculum and increased parental involvement and support — and barriers to advancement in EXCELS. They emphasized the amount of time required, the cumbersome nature of the process, and the need for additional credentialing, accreditation, training, and support.

Other Programs and Services for Families with Young Children

Judy Centers and Early Head Start

Funded by a combination of public resources from the Maryland State Department of Education and private resources through the Baltimore Community Foundation, a network of 11 Judy Centers operates in Baltimore City. Located at elementary schools in neighborhoods with high poverty, Judy Centers offer adult education services or referrals for adults, case management and support services for families, referrals to child care — especially for children experiencing developmental delays — developmental and health screenings for young children, family engagement activities, parenting classes, and play groups. Some also provide home visits to support early learning. MFN surveyed coordinators at all 11 of Baltimore’s Judy Centers to get a description of the services they provide. The results of this survey are included in Appendix F.

Nine Early Head Start programs also serve families with young children by providing home visits, case management, and goal setting.

Figure 11 displays the availability of Early Head Start and Judy Center programs over the percentage of children in poverty. Figure 12 maps these programs over the average annual number of babies born.



FIGURE 11: Early Head Start Centers, Judy Centers, and Percent of Children in Poverty

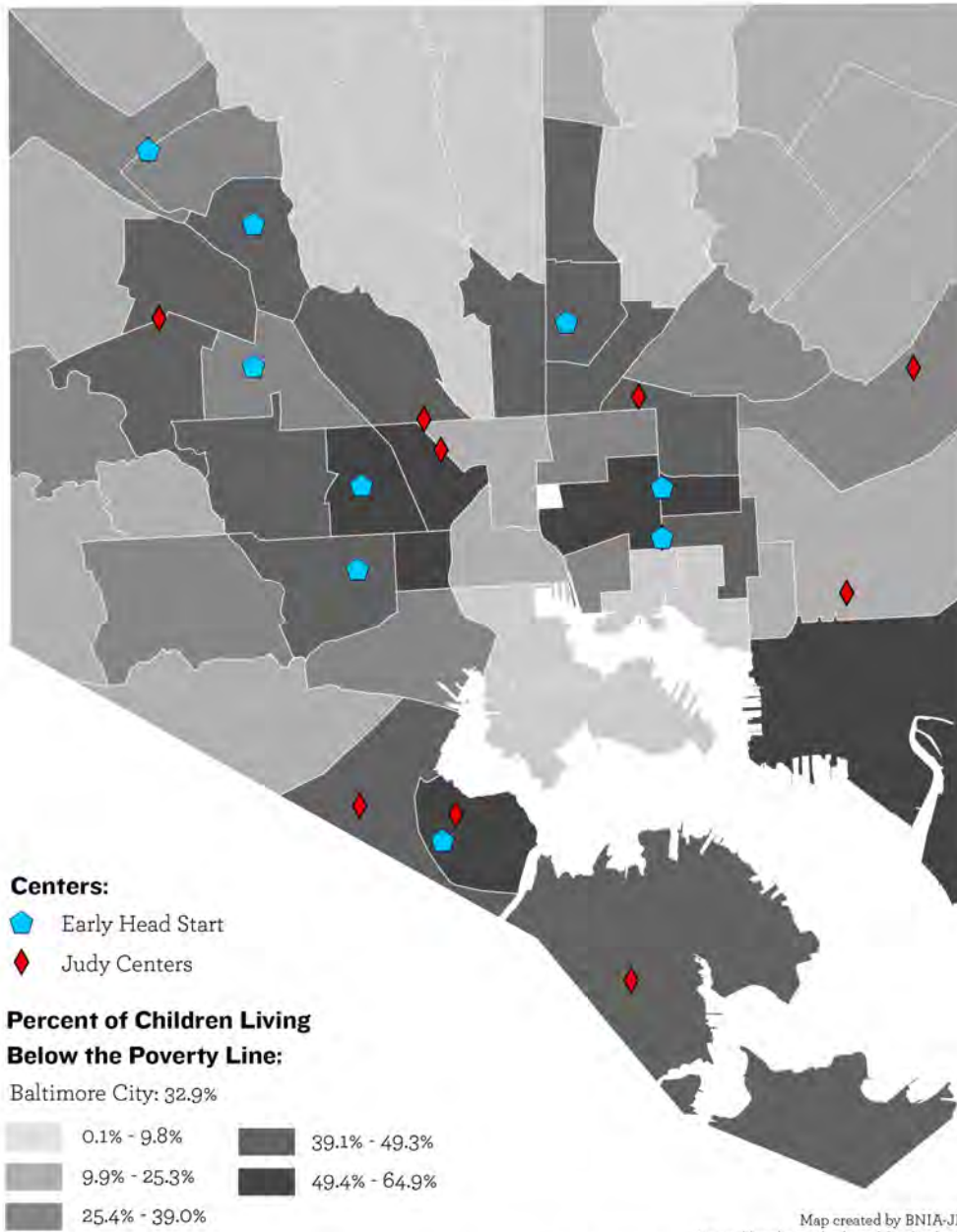
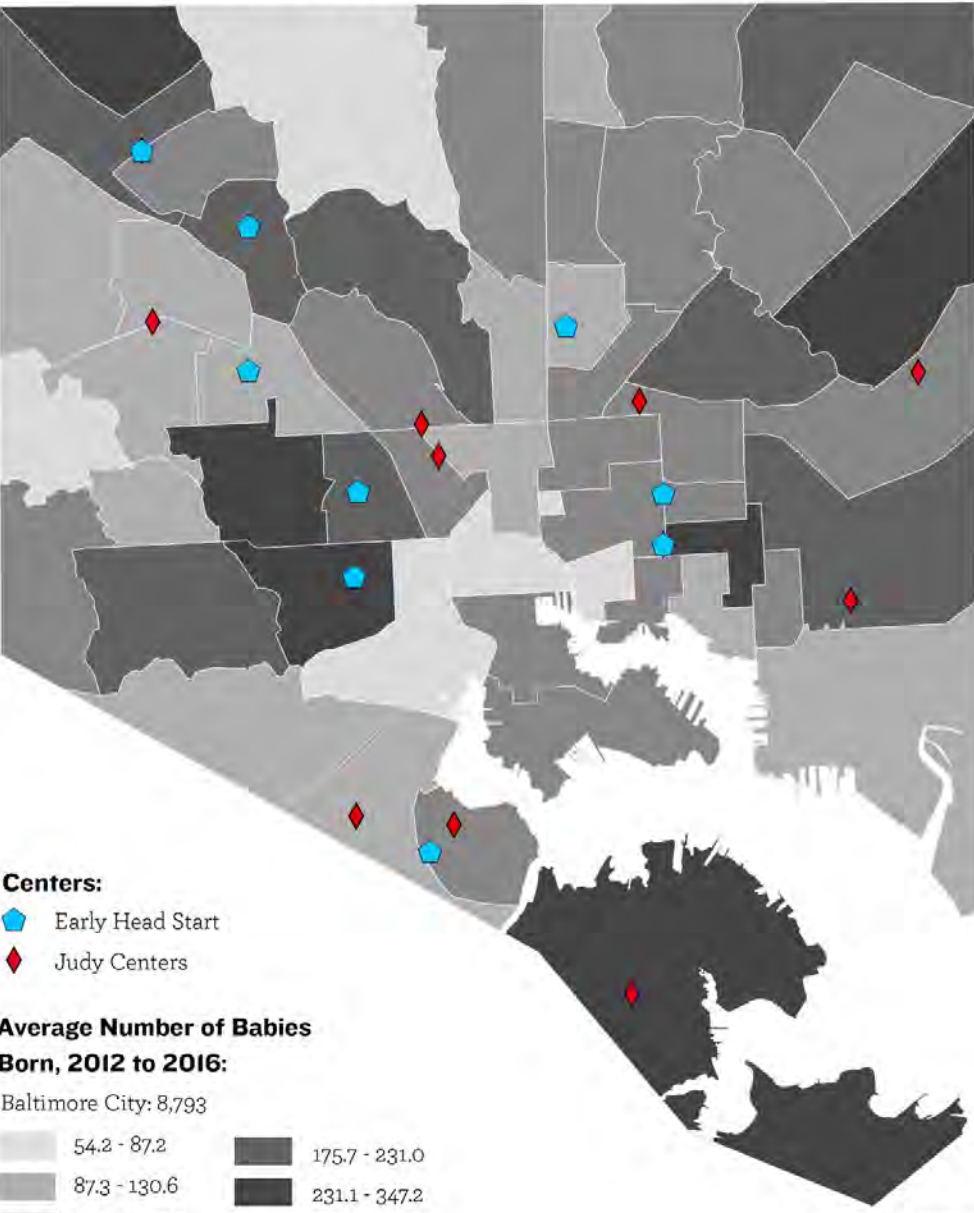


FIGURE 12: Early Head Start Locations, Judy Centers, and Average Number of Babies Born



Map created by BNIA-JFI, 2020.
Natural breaks method used for displaying data.
Sources: Maryland Family Network; Maryland Department of Vital Statistics

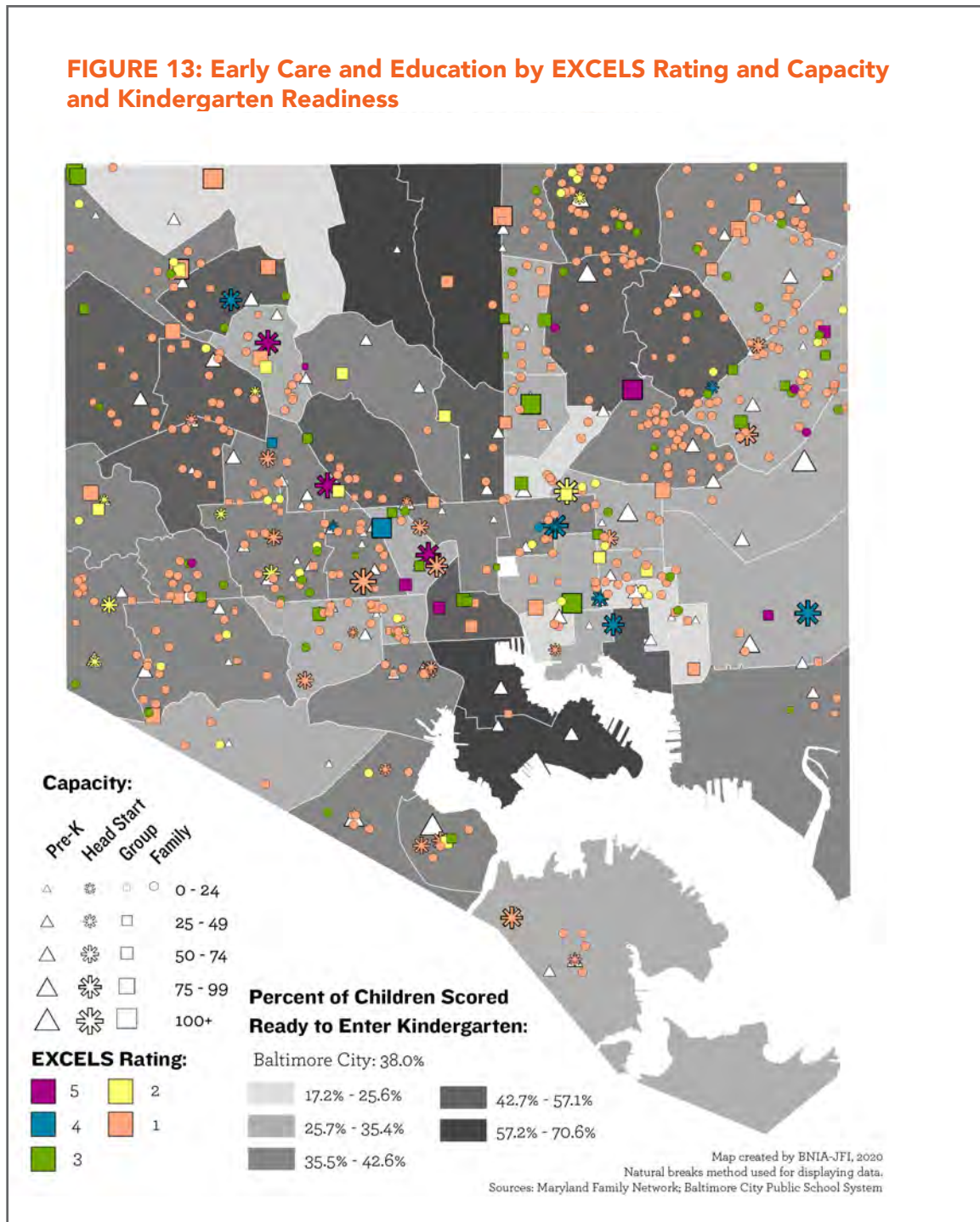
Time constraints related to the coronavirus impeded work the study team had intended to do in conjunction with the Baltimore City Health Department to further investigate and summarize WIC, Infants and Toddlers and Home Visiting programs. It is our hope that the Smart Thinking Workgroup will continue to explore the availability of these programs and their connection to outcomes of concern to the ECAC.

School Readiness and Early Care and Education

While certainly not the only outcome of interest in early childhood care and education — coverage for working parents and the health and safety of young children are also of primary concern — advancing school readiness remains an outcome of considerable interest to funders and policymakers, providers, and families.

BNIA, through its partnership with City Schools, has mapped Kindergarten Readiness Assessment (KRA) results by home address. Figure 13 includes these data overlaid by child care and pre-kindergarten availability.

FIGURE 13: Early Care and Education by EXCELS Rating and Capacity and Kindergarten Readiness



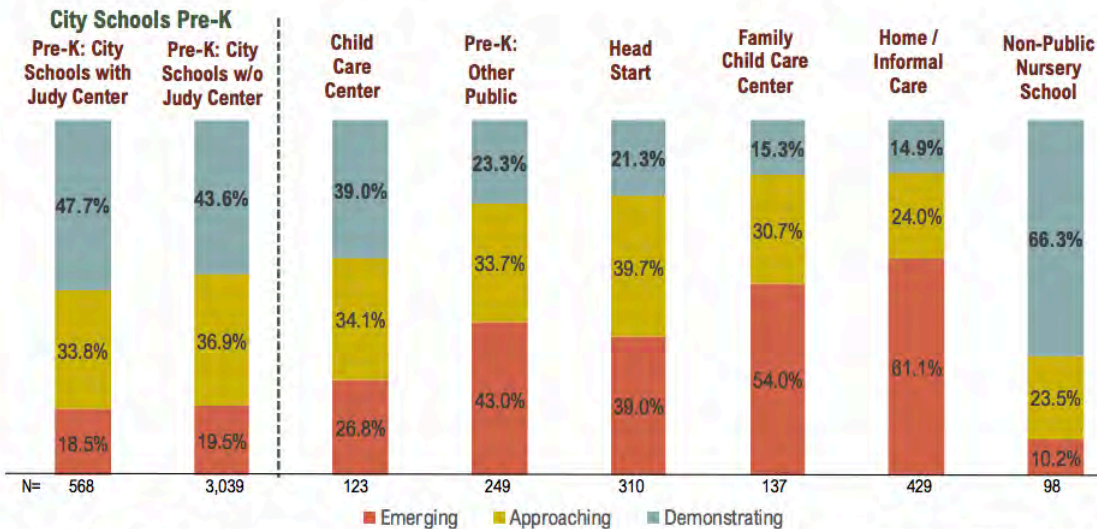
Based on home address alone, kindergarten readiness as measured by the KRA appears to be driven mostly by affluence and is highest in the communities where the city's whitest and least poor families live — school readiness seen as another product of existing inequities.

That is part, but not the whole of the story. Recent KRA results presented to the Baltimore City School Board in February of this year do note that kindergarten readiness is highest among children coming from non-public nursery schools (another proxy for affluence), but then followed in order by children who attended City Schools' pre-kindergarten, child care centers, other public pre-kindergarten programs, or attended Head Start. Readiness was lowest in kindergartners who attended a family care setting or were in home or informal care.

FIGURE 14

2019-20 Readiness by Prior Care Setting

Only students who attended non-public nursery schools were more prepared for Kindergarten than those that attended City Schools Pre-K programs



Source: OAA aggregates of KRA. Predominant prior care data are self-reported by parents. See glossary for definitions of each prior care setting. Data shown here omit students in unknown prior care settings and those that repeated kindergarten.

Source: Baltimore City Public Schools, Early Childhood Board Presentation, February 2020.

Yet these data too are incomplete and likely under-represent the contributions of Head Start and other child care providers who may have served these children prior to their enrollment in City Schools' pre-kindergarten. They cover only the prior care setting of a child in the year before kindergarten. For all settings other than City Schools pre-kindergarten, they rely on a parent's self-report at kindergarten registration. The contribution of Judy Centers noted here has also been questioned as the data available do not indicate that a child — or his or her family — actually participated in any programming of the Judy Center, just that one existed at the school where they attended pre-kindergarten. (Indeed, this may say more about school climate and commitment to early care and education than any actual service that a child or family received.)

To better sort out the effect of prior care settings on kindergarten readiness, earlier work by the Baltimore Education Research Consortium and the Early Childhood Data Collaborative used administrative records matching to track the prior care settings and kindergarten readiness of members of the City Schools' entering kindergarten class of 2014. With controls for the mother's prior education, family socio-economic status, and race, children who attended Head Start for two years were 30% more likely to be ready for kindergarten than their peers who did not participate. Children who attended pre-kindergarten for two years were three times as likely to be ready, and children who attended Head Start and then pre-kindergarten were three and a half times more likely to be ready.

Table 18. Kindergarten Readiness by Prior Care Setting for the Class of 2027

Program	Increased Odds of Being Kindergarten Ready
Head Start for two years (N=550)	1.3*
Pre-K as 4-year old (N=2,300)	3.0***
Head Start and then Pre-K (N=839)	3.6***

Source: Baltimore Education Research Consortium, *Early Education Data Collaborative as cited in Grigg et al, Kindergarten Attendance and Readiness for Baltimore's Class of 2027, March 2016. Total N is 4715 entering kindergartners in the fall of 2104.*

* $p < 0.01$, *** $p < 0.001$

This analysis also had its limitations in that early care and education settings other than Head Start and City Schools pre-kindergarten were not included, though it does offer a promising approach to disentangling the murkiness of the existing data around KRA scores and prior care.

All this is to say that while it is clear that affluence plays a big role and that public pre-kindergarten programs seem to be helping to close the equity gap, there is currently more heat than light around the contribution of prior care settings to kindergarten readiness. Time and effort would be well spent further disentangling this relationship.

Emerging Gaps and Opportunities

Earlier versions of this analysis were presented to the Smart Thinking Workgroup, to the Mayor's Children's Cabinet Workgroup on Early Childhood Development, and to the full ECAC. In reviewing findings and discussing implications, a clear set of opportunities have emerged. To strengthen and improve the network of early care and education programs available to Baltimore's youngest children, to better support families and providers, and to improve school readiness, ECAC members and other stakeholders can work together to:

- Fill gaps in existing care, especially for infants and toddlers and for Hispanic/Latinx families in the south and southeast communities of Baltimore.
- Address affordability for families whose earnings place them above the federal poverty level but below the area median income by expanding the Child Care Scholarship and Head Start — with a particular emphasis on care for infants and toddlers.
- If and when the expansion of public pre-kindergarten programs proceeds under the Blueprint for Maryland's Future, pay particular attention to communities of deep poverty where kindergarten enrollment currently exceeds pre-kindergarten enrollment — suggesting unmet demand.
- Maximize and align public programs to ensure a continuum of high-quality care that proceeds from child care settings in families and centers to Head Start and then public pre-kindergarten.
- Address quality and support advancement in EXCELS by developing and providing early childhood curricula,¹⁷ training, funding and support to providers, and developing strategies to increase parental involvement.
- Improve EXCELS by addressing administrative hurdles to provider participation and increasing incentives to advancement, credentialing, and accreditation.
- Prioritize the learning and data development agenda to:
 - Continue to sort out KRA results based on prior care settings.
 - Better identify the contribution of other programs and services to families' well-being and to improved outcomes for young children.
 - Deepen an understanding of parent and care giver demand for licensed care, especially among populations, such as the city's growing Latinx community, that appear to be underserved.¹⁸
 - Strengthen ECAC's understanding of the overall experiences and trajectories of the city's youngest children from birth until the time they enter school.

This landscape analysis presents a picture of the world as it existed in February of 2020. In the end, the greatest opportunity before the ECAC is to consider how to emerge from the COVID-19 crisis with greater attention to equity and improved outcomes for the city's youngest children.

Endnotes

- ¹ Community Statistical Areas are aggregations of census tracts used by BNIA and its partners to describe neighborhood conditions. More here: <https://bniajfi.org/faqs/>
- ² MFN pulled data from LOCATE for this analysis in November 2019.
- ³ MFN's Child Care Demographic report estimates that 80% of available child care seats or slots are used by children under the age of five. See: <http://www.marylandfamilynetwork.org/wp-content/uploads/2020/02/Baltimore-City.pdf>
- ⁴ Note that the LOCATE database contains regulated child care programs and does not include informal or home care settings, which many families may depend on for care, especially for infants.
- ⁵ Because the birth rate has been falling in Baltimore, rather than take an annual average over the five-year period, we take the most current year for which data are available (2018) and multiply by two to get an estimate for the number of children ages 0 to 23 months.
- ⁶ <https://www.marylandexcels.org>
- ⁷ Ibid.
- ⁸ For example, to expand pre-kindergarten programs to all 4-year-olds and low-income 3-year-olds in the state, the Kirwan Commission's Blueprint for Maryland's Future proposes a blended system that relies on public pre-kindergarten programs as well as center-based child care programs at EXCELS Level 3 or greater.
- ⁹ A change that was made to better align with the kindergarten enrollment and Kindergarten Readiness Assessment (KRA) data presented in Figure 12 and Appendix C.
- ¹⁰ See, for example, Foster, Lionel, et al. "The Black Butterfly: Racial Segregation and Investment Patterns in Baltimore," The Urban Institute, February 5, 2019.
- ¹¹ Especially as the expansion of pre-kindergarten to all 4-year-olds and low-income 3-year-olds recommended by the Kirwan Commission's Blueprint for Maryland's Future is implemented.
- ¹² <http://www.marylandfamilynetwork.org/wp-content/uploads/2020/02/Baltimore-City.pdf>
- ¹³ Based on Baltimore City's 2019 allocation of Child Care Scholarship Funds from MSDE (23,444,900), MFN estimates that there are approximately 4169 subsidized slots available. The figure in the table is 80% of 4169, adjusted for the percentage of slots that are estimated to be used for children under the age of five.
- ¹⁴ Per ACS data presented in Table 10.
- ¹⁵ U.S. Census American Community Survey, five-year average for Baltimore City (2013-2014). Rounded up from 32.9%.
- ¹⁶ Percentage of mothers in the workforce. U.S. Census 2010 as reported in Maryland Family Network, 2020 Child Care Demographic Report: Baltimore City.
- ¹⁷ The Maryland State Department of Education has developed a free curriculum for 4-year-olds (<https://education.umd.edu/about-college/leadership/csw>), has suggested or approved other early care and education curricula (https://earlychildhood.marylandpublicschools.org/system/files/filedepot/4/msde_recommended_curriculum_final.pdf), and outlined key curricular components for infants and toddlers (<https://earlychildhood.marylandpublicschools.org/healthy-beginnings>).
- ¹⁸ MFN conducted a demonstration project in the mid 2000's to understand and address barriers to the use of regulated care among Hispanic families, the findings from which may be useful here.

Schedule of Appendices

Appendix A: Births in Baltimore by Community Statistical Area

Appendix B: Percentage Change in Births 2014-2018 by Community Statistical Area

Appendix C: Additional Maps and Analyses by Community Statistical Area

Appendix D: Pre-Kindergarten Enrollment as a Percentage of Kindergarten Enrollment and by Percentage of Children in Poverty by Community Statistical Area

Appendix E: Telephone Survey of Providers, Additional Responses

Appendix F: Judy Centers Program Review

Appendix G: Infographic on Maryland EXCELS

Appendix H: Head Start Programs in Baltimore by Excels Level and Capacity

Appendix A: Total Births by Community Statistical Area, 2014 to 2018 (ranked by number of births)

Community Statistical Area	All Births (2014 to 2018)
Cedonia/Frankford	1,616
Cross-Country/Cheswolde	1,524
Patterson Park North & East	1,449
Brooklyn/Curtis Bay/Hawkins Point	1,335
Southwest Baltimore	1,265
Greater Rosemont	1,240
Orangeville/East Highlandtown	1,113
Medfield/Hampden/Woodberry/Remington	1,111
Harford/Echodale	1,084
Belair-Edison	1,051
Allendale/Irvington/S. Hilton	1,047
Sandtown-Winchester/Harlem Park	1,025
Glen-Fallstaff	1,018
Southern Park Heights	938
Loch Raven	830
Inner Harbor/Federal Hill	793
Upton/Druid Heights	791
Cherry Hill	781
Highlandtown	780
Beechfield/Ten Hills/West Hills	772
Oldtown/Middle East	764
Claremont/Armistead	723
Northwood	718
South Baltimore	698
Hamilton	690
Pimlico/Arlington/Hilltop	673

Madison/East End	668
Greater Govans	667
Fells Point	667
Clifton-Berea	653
Lauraville	646
North Baltimore/Guilford/Homeland	645
Canton	636
Greater Charles Village/Barclay	625
Midway/Coldstream	621
Westport/Mt. Winans/Lakeland	612
Morrell Park/Violetville	610
Greenmount East	601
Forest Park/Walbrook	594
Penn North/Reservoir Hill	593
Dorchester/Ashburton	581
Southeastern	562
Greater Mondawmin	530
Howard Park/West Arlington	520
Midtown	510
The Waverlies	475
Chinquapin Park/Belvedere	474
Edmondson Village	463
Downtown/Seton Hill	401
Washington Village/Pigtown	397
Poppleton/The Terraces/Hollins Market	357
Harbor East/Little Italy	348
Dickeyville/Franklinton	305
Mount Washington/Coldspring	290
Greater Roland Park/Poplar Hill	247

Source: Maryland Vital Statistics 2014 – 2018 as analyzed by the Baltimore Neighborhood Indicators Alliance

Appendix B: Percent Change in Births by Community Statistical Area, 2014 to 2018
(ranked from decreases to increases)

Community Statistical Area	Average Number of Births (2014 to 2018)	All Births (2014 to 2018)	Percent Change in # of Births (2014 to 2018)
Harbor East/Little Italy	70	348	-44.3%
Greenmount East	120	601	-34.9%
Southern Park Heights	188	938	-32.7%
Midway/Coldstream	124	621	-30.3%
Howard Park/West Arlington	104	520	-28.5%
Dorchester/Ashburton	116	581	-28.3%
Greater Govans	133	667	-28.0%
Pimlico/Arlington/Hilltop	135	673	-26.8%
Midtown	102	510	-26.3%
The Waverlies	95	475	-24.8%
Sandtown-Winchester/ Harlem Park	205	1,025	-24.0%
Southwest Baltimore	253	1,265	-23.8%
Clifton-Berea	131	653	-23.2%
Cherry Hill	156	781	-23.1%
Forest Park/Walbrook	119	594	-22.1%
Inner Harbor/Federal Hill	159	793	-22.0%
Beechfield/Ten Hills/West Hills	154	772	-22.0%
North Baltimore/ Guilford/Homeland	129	645	-22.0%
Patterson Park North & East	290	1,449	-21.8%
Greater Rosemont	248	1,240	-21.7%
Penn North/Reservoir Hill	119	593	-21.6%

Greater Mondawmin	106	530	-21.4%
Northwood	144	718	-21.2%
Washington Village/Pigtown	79	397	-20.5%
Claremont/Armistead	145	723	-18.5%
Madison/East End	134	668	-18.1%
Canton	127	636	-17.3%
Belair-Edison	210	1,051	-16.1%
Greater Roland Park/Poplar Hill	49	247	-14.5%
Fells Point	133	667	-13.1%
BALTIMORE CITY	8,333	41,663	-13%
Southeastern	112	562	-12.9%
Highlandtown	156	780	-12.0%
Medfield/Hampden/Woodberry /Remington	222	1,111	-11.7%
Lauraville	129	646	-11.4%
Upton/Druid Heights	158	791	-11.0%
Dickeyville/Franklintown	61	305	-10.9%
Downtown/Seton Hill	80	401	-10.8%
Oldtown/Middle East	153	764	-9.6%
Cedonia/Frankford	323	1,616	-9.5%
Edmondson Village	93	463	-8.4%
Hamilton	138	690	-8.2%
Allendale/Irvington/S. Hilton	209	1,047	-7.0%
Poppleton/The Terraces/Hollins Market	71	357	-7.0%
Chinquapin Park/Belvedere	95	474	-6.7%
Greater Charles Village/Barclay	125	625	-3.3%

Loch Raven	166	830	-3.0%
Orangeville/East Highlandtown	223	1,113	0.0%
Glen-Fallstaff	204	1,018	2.0%
Mount Washington/Coldspring	58	290	3.0%
Westport/Mt. Winans/Lakeland	122	612	3.3%
Harford/Echodale	217	1,084	5.2%
Brooklyn/Curtis Bay/Hawkins Point	267	1,335	7.7%
South Baltimore	140	698	8.7%
Morrell Park/Violetville	122	610	10.2%
Cross-Country/Cheswolde	305	1,524	12.7%

Source: Maryland Vital Statistics 2014-2018 as analyzed by the Baltimore Neighborhood Indicators Alliance

Appendix C: Additional Maps and Analyses

A1: Pre-Kindergarten Classrooms and Capacity/ Children in Poverty

A2: Head Start Program Locations, Capacity and EXCELS/ Children in Poverty

A3: Group Child Care Programs/ Children in Poverty

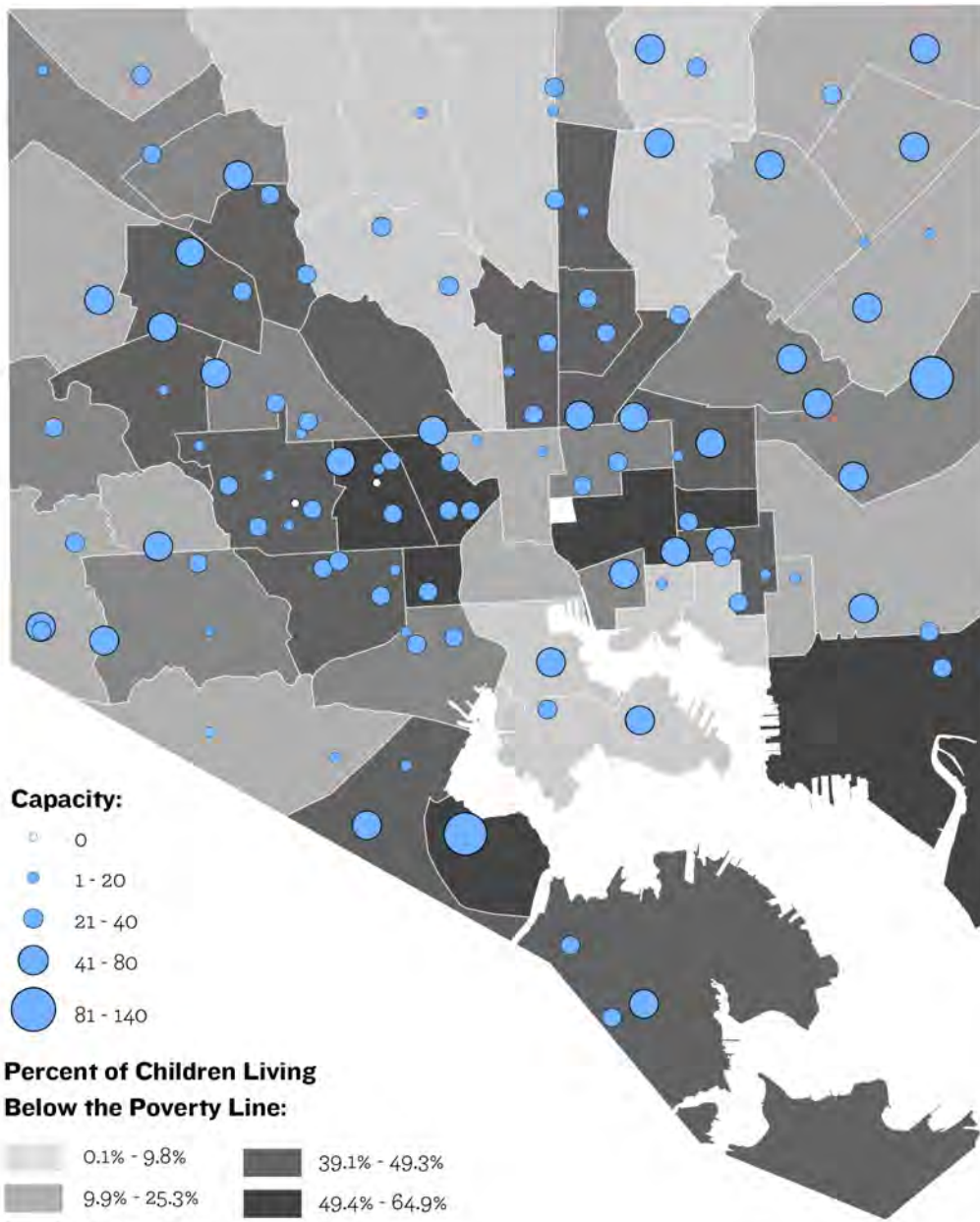
A4: Family Child Care Programs/ Children in Poverty

A5: Early Childhood Care and Education/ Third Grade PARCC Results by Home Address

A6: Elementary School Location and Type/ Children in Poverty

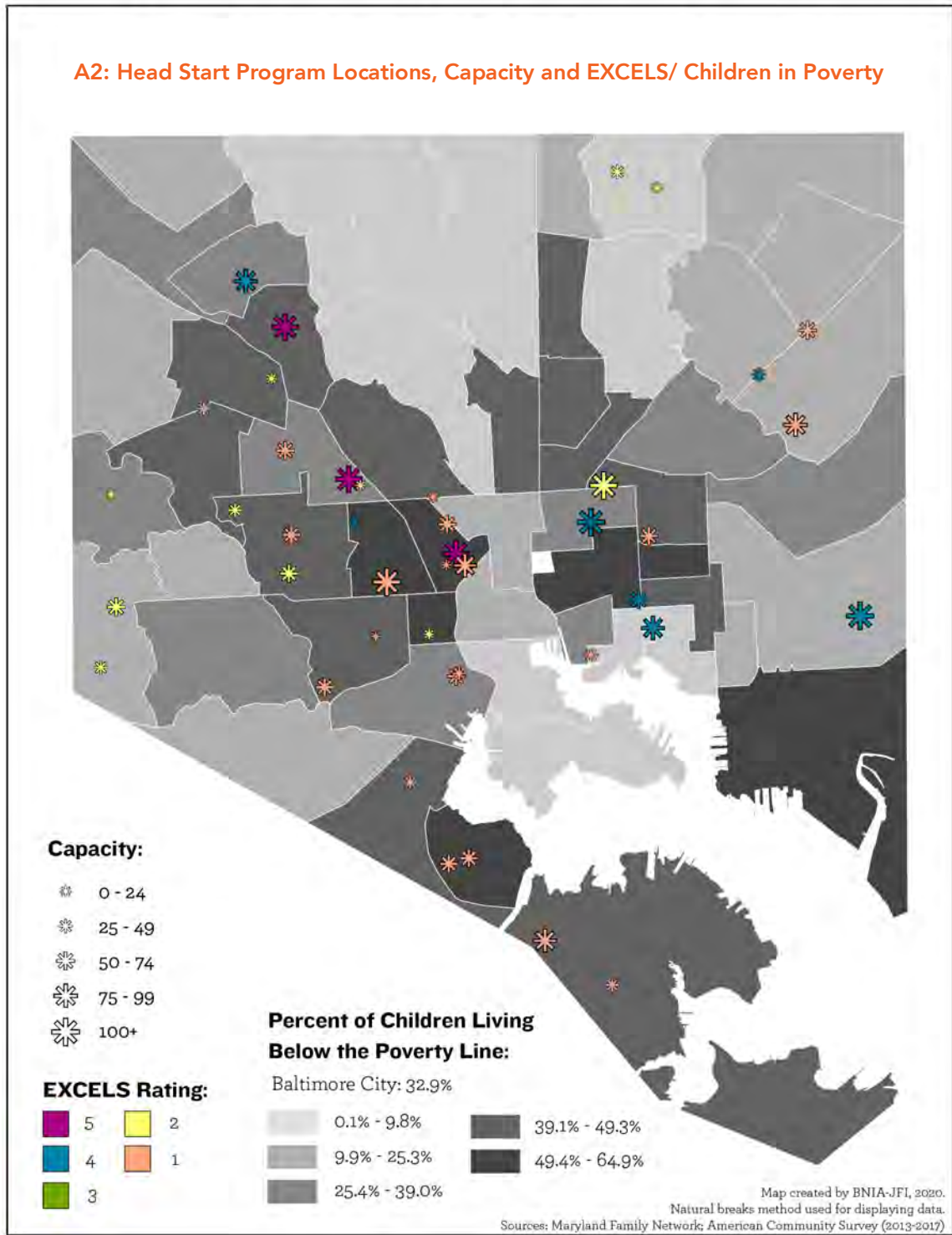
A7: Elementary School Location and Type/ Number of Babies Born

A1: Pre-Kindergarten Classrooms and Capacity/ Children in Poverty

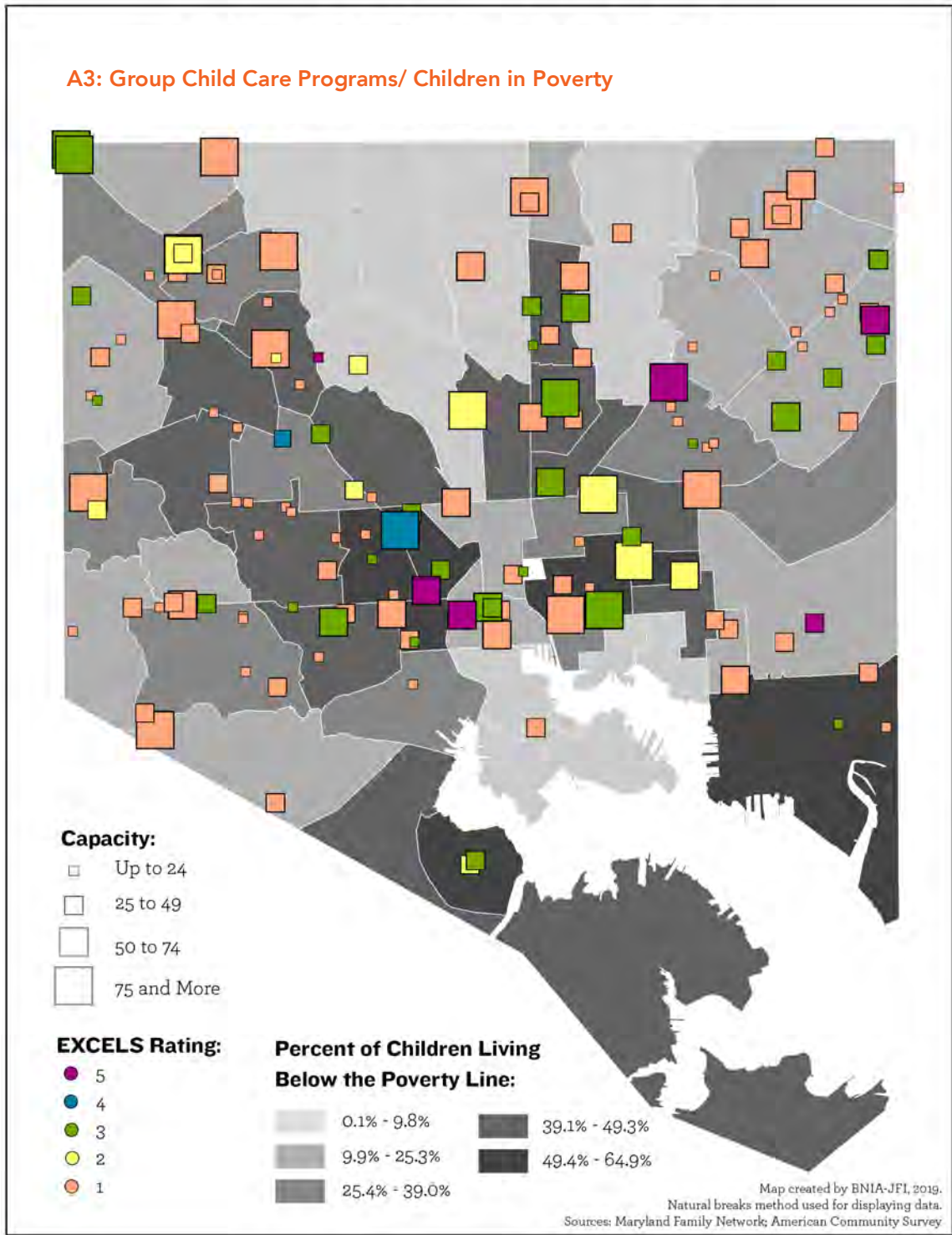


Map created by BNIA-JFI, 2019.
Natural breaks method used for displaying data.
Sources: Family League of Baltimore; American Community Survey

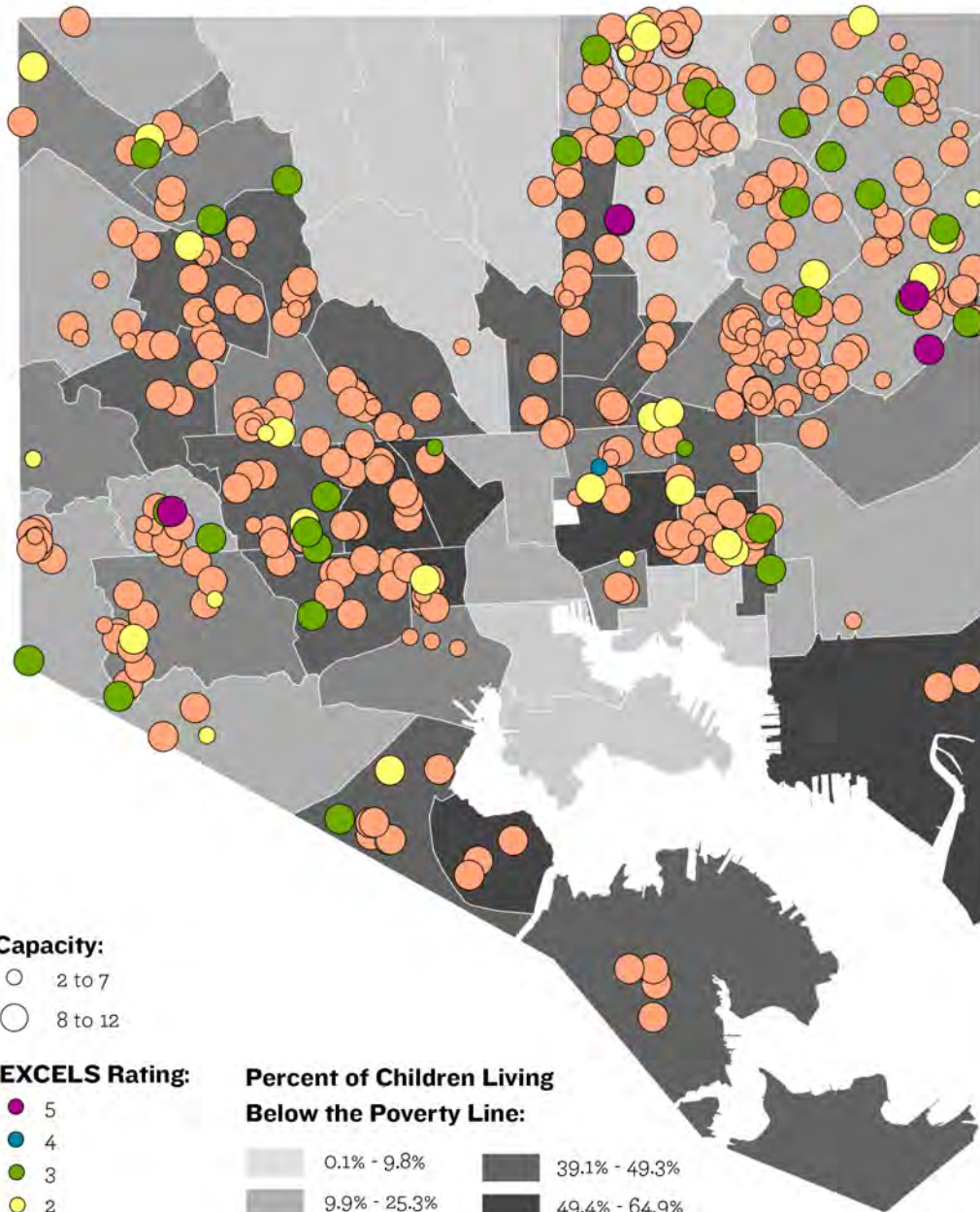
A2: Head Start Program Locations, Capacity and EXCELS/ Children in Poverty



A3: Group Child Care Programs/ Children in Poverty



A4: Family Child Care Programs/ Children in Poverty



Capacity:

- 2 to 7
- 8 to 12

EXCELS Rating:

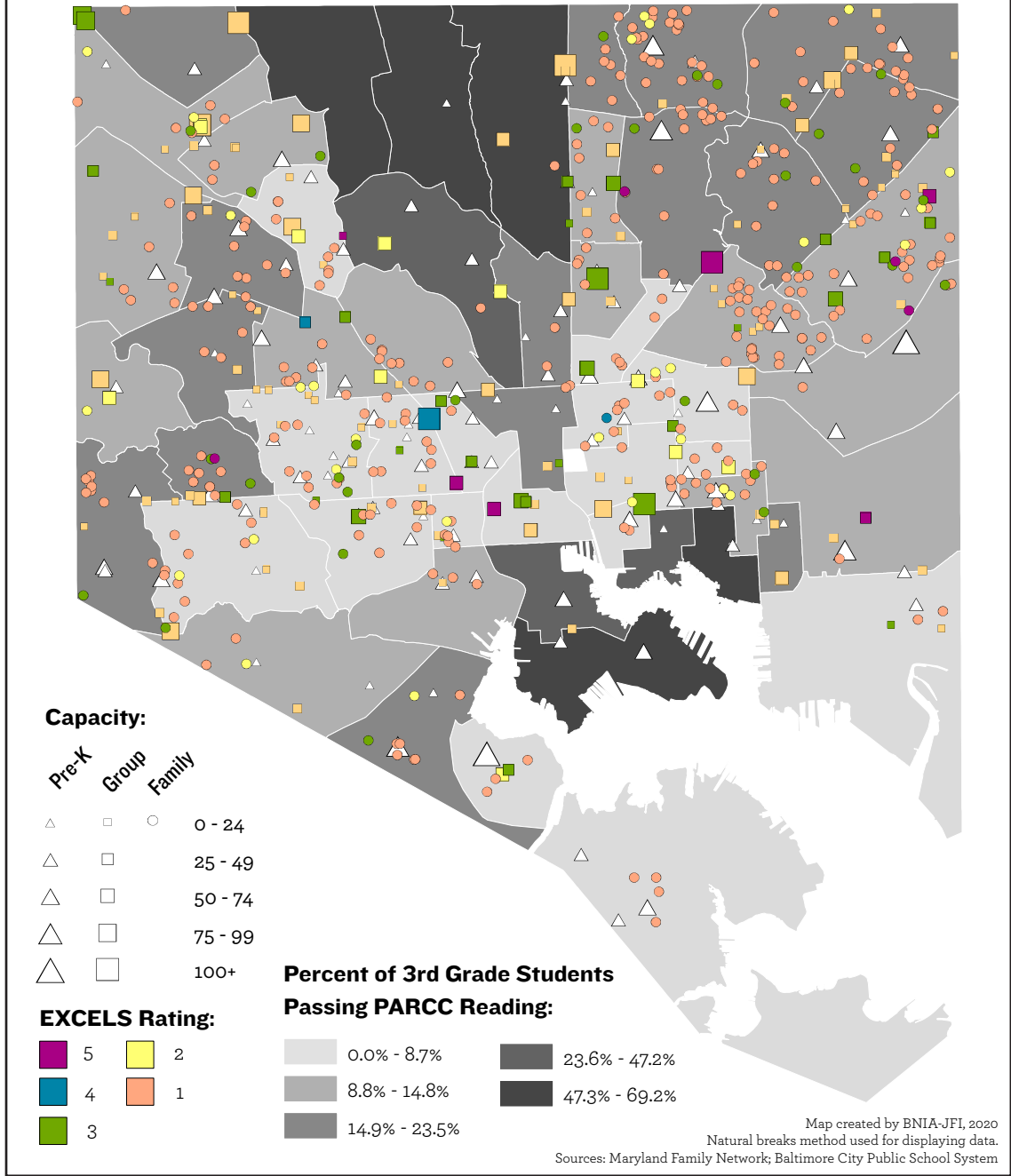
- 5
- 4
- 3
- 2
- 1

Percent of Children Living Below the Poverty Line:

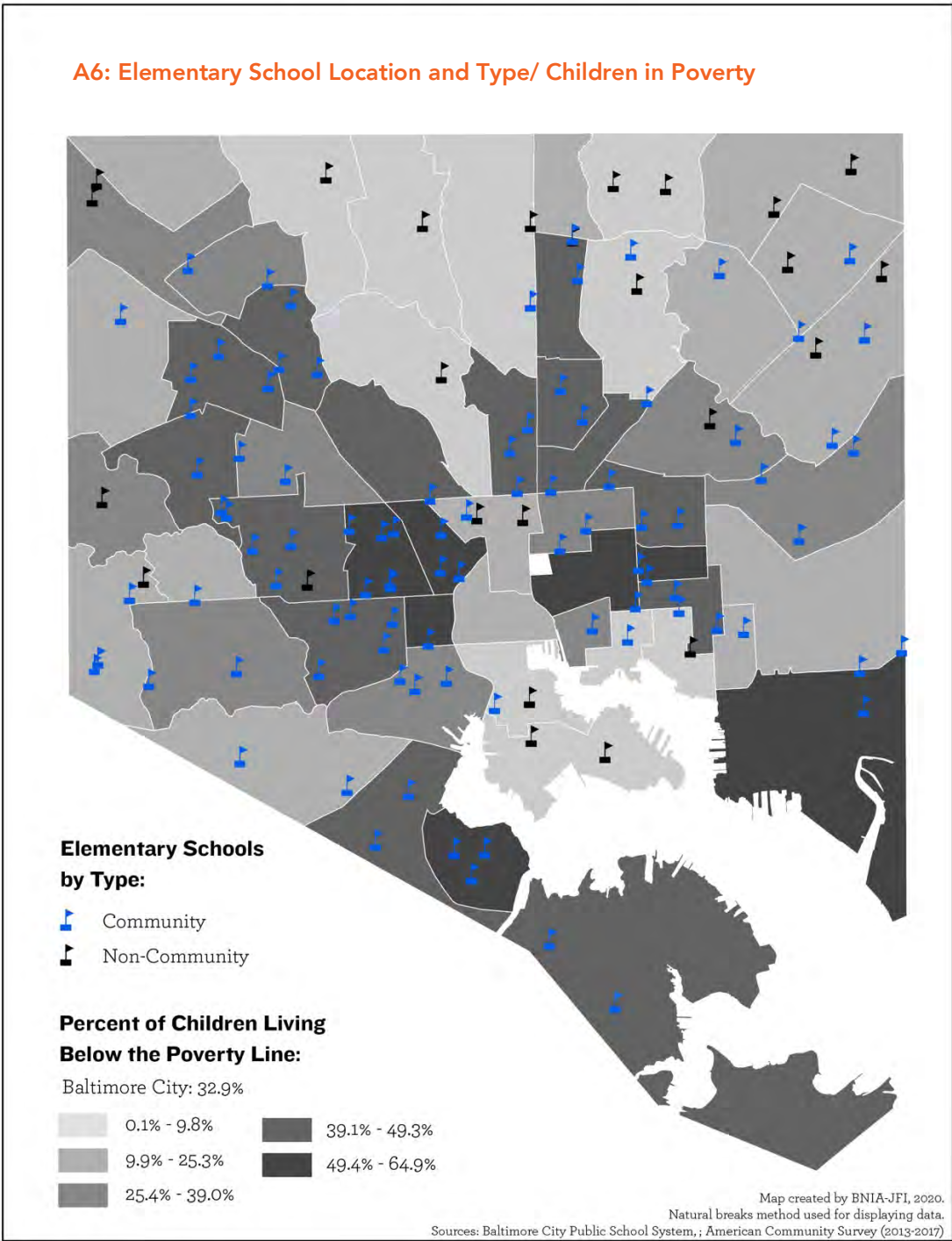
- | | |
|---------------|---------------|
| 0.1% - 9.8% | 39.1% - 49.3% |
| 9.9% - 25.3% | 49.4% - 64.9% |
| 25.4% - 39.0% | |

Map created by BNIA-JFI, 2019.
Natural breaks method used for displaying data.
Sources: Maryland Family Network; American Community Survey (2013-2017)

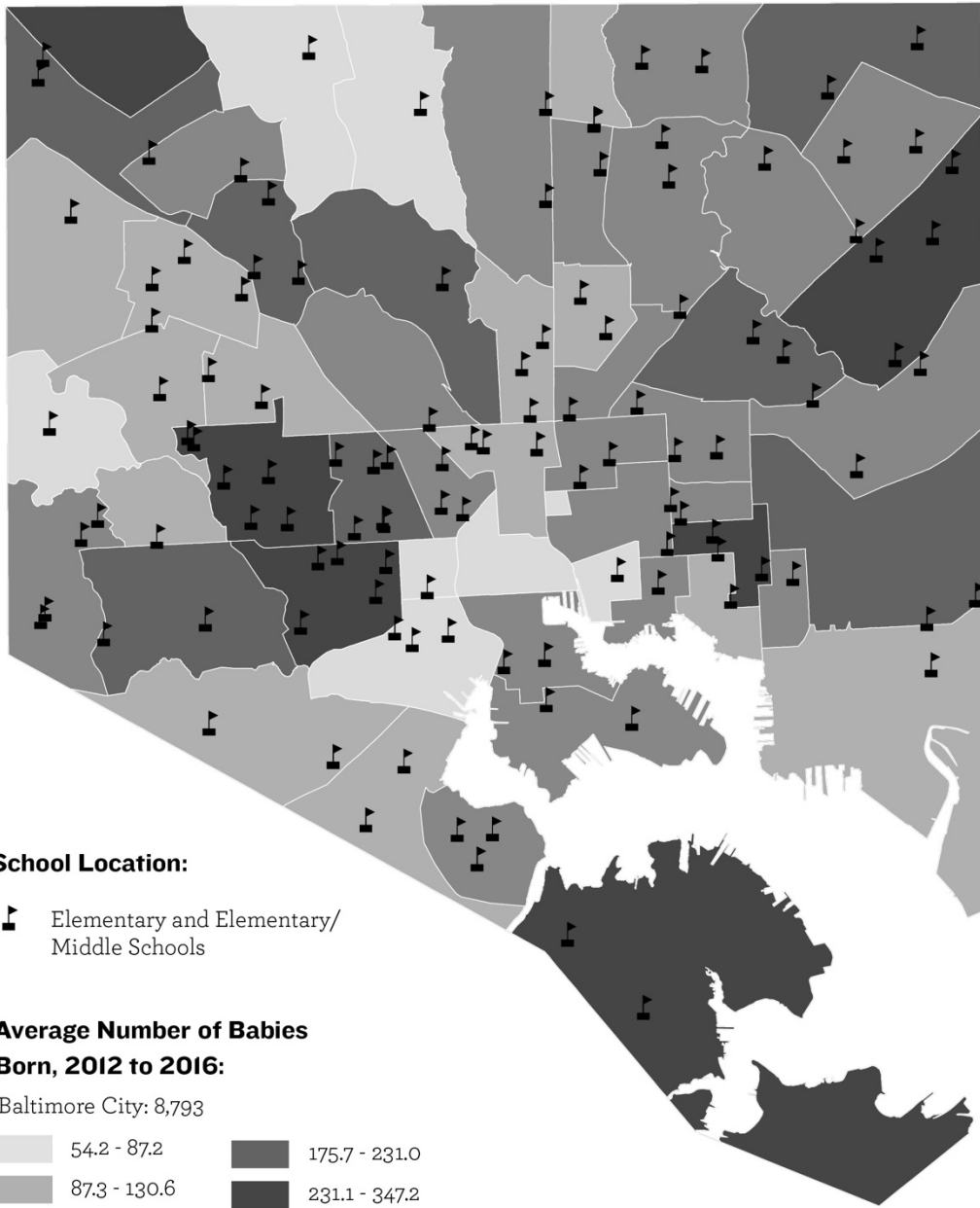
A5: Early Childhood Care and Education/ Third Grade PARCC Results by Home Address



A6: Elementary School Location and Type/ Children in Poverty



A7: Elementary School Location and Type/ Number of Babies Born



Map created by BNIA-JFI, 2020.
Natural breaks method used for displaying data.
Sources: Maryland Family Network; Maryland Vital Statistics, Baltimore City Public School System

**Appendix D: Pre-K Enrollment as a Percentage of Kindergarten Enrollment, 2016-2017:
Ranked by Percentage of Children in Poverty**

Community Statistical Area	Age 4 Pre-K Enrollment by Home Address (2016 to 2017 SY)	Kindergarten Enrollment by Home Address (2016 to 2017 SY)	Pre-K enrollment as a percentage of Kindergarten enrollment	Percent of Children in Poverty (2013 to 2017)
Upton/Druid Heights	106	165	64%	64.9
Poppleton/The Terraces/Hollins Market	52	82	63%	57.4
Cherry Hill	120	144	83%	56.8
Sandtown-Winchester/Harlem Park	157	196	80%	56.7
Madison/East End	114	134	85%	56.1
Oldtown/Middle East	100	159	63%	55.2
Southeastern	88	97	91%	52.9
Midway/Coldstream	95	139	68%	49.3
Southwest Baltimore	178	226	79%	49.2
Southern Park Heights	117	169	69%	48.5
Clifton-Berea	105	138	76%	47.9
Forest Park/Walbrook	86	130	66%	47.7
Greater Govans	97	133	73%	47.2
Penn North/Reservoir Hill	57	89	64%	46.6
Brooklyn/Curtis Bay/Hawkins Point	185	259	71%	46.4
The Waverlies	64	80	80%	44.2
Dorchester/Ashburton	101	143	71%	43.5
Greater Rosemont	192	254	76%	43.2
Patterson Park North & East	139	196	71%	40.9

Greater Charles Village/Barclay	72	74	97%	40.4
Westport/ Mt. Winans/Lakeland	96	141	68%	40.2
Pimlico/Arlington/ Hilltop	72	139	52%	39.0
Greater Mondawmin	93	117	79%	37.5
Greenmount East	88	119	74%	36.4
Claremont/Armistead	141	165	85%	34.6
Belair-Edison	171	226	76%	34.6
Dickeyville/Franklintown	63	75	84%	34.5
Washington Village/Pigtown	49	64	77%	34.2
Harbor East/Little Italy	60	89	67%	33.4
Baltimore City	5,272	7,266	73%	32.9
Allendale/Irvington/ S. Hilton	151	189	80%	32.8
Glen-Fallstaff	81	128	63%	27.4
Edmondson Village	83	130	64%	25.3
Beechfield/Ten Hills/ West Hills	99	139	71%	23.9
Chinquapin Park/ Belvedere	61	76	80%	23.2
Orangeville/East Highlandtown	142	204	70%	22.5
Howard Park/ West Arlington	67	99	68%	21.6
Cedonia/Frankford	247	355	70%	20.0
Harford/Echodale	135	170	79%	18.2
Lauraville	90	123	73%	16.6
Midtown	32	49	65%	16.2
Morrell Park/Violetville	81	107	76%	15.4
Highlandtown	53	78	68%	14.6

Downtown/Seton Hill	22	23	96%	13.4
Hamilton	111	146	76%	13.1
Cross-Country/ Cheswolde	45	55	82%	13.0
Northwood	112	139	81%	9.8
Medfield/Hampden/ Woodberry/Remington	86	109	79%	8.5
Inner Harbor/ Federal Hill	34	59	58%	8.2
Fells Point	26	43	60%	7.3
Loch Raven	129	192	67%	6.5
North Baltimore/ Guilford/Homeland	28	83	34%	4.5
Canton	16	41	39%	4.0
Mount Washington/ Coldspring	20	43	47%	3.8
Greater Roland Park/Poplar Hill	17	48	35%	3.8
South Baltimore	43	43	100%	0.1

Source: Baltimore City Public Schools as analyzed by the Baltimore Neighborhood Indicators Alliance

Appendix E: Maryland Family Network Telephone Survey of Child Care Providers, February 2020

Maryland Family Network Phone Survey Response Rates, February 2020

Phone Survey Respondents			
	Responded	In LOCATE (11/19)	Response Rate
Family Providers	187	493	38%
Group Providers	83	289	29%
Total Providers	270	782	35%

Primary Language Spoken by Caregivers

Primary Language Spoken	English	Spanish
Family Providers	176 (94 %)	11 (6 %)
Group Providers	83 (100 %)	

Acceptance of Child Care Scholarship/Child Care Subsidies

Accept Child Care Scholarship	Yes	No
Family Providers (n = 200)	95%	5%
Group Providers (n = 81)	84%	16%

Ways Families Find Care (percent of responses, multiple responses given)

How Hear About?	Word of Mouth/ Referrals	Online/ Website/ Social Media	LOCATE	Advertising	Recruitment
Family Providers (n = 310)	52%	19%	11%	10%	
Group Providers (n=122)	48%	19%		10%	7%

Appendix F: Judy Center Program Services, Maryland Family Network Survey, February 2020

Program	Services
Arlington Elementary School 3705 West Rogers Avenue 21215	<p>Professional Support for Child Care Providers</p> <p>Helping local daycares in the area with the Excels program. Professional development for child care providers in the area.</p>
Arundel Elementary School 2400 Round Road 21225	<p>Professional Support for Child Care Providers</p> <p>Helping local daycares in the area with the Excels program. Professional development for child care providers in the area.</p>
	<p>Early Learning Home Visits</p> <p>Y</p>
	<p>Partnerships</p> <p>ShareBaby events to provide diapers, wipes and other essential baby items to our families with young children.</p>
	<p>Play Groups</p> <p>For families in 21215 zip code area</p>
	<p>Parenting Classes</p> <p>Class activities covering child development areas</p>
	<p>Family Engagement Activities</p> <p>Spanish and English classes in early a.m. on Wed., family dinners, parent breakfast</p>
	<p>Developmental and Health Screenings</p> <p>Y</p>
	<p>Child Care Assistance</p> <p>Referrals for parents who have children with develop mental delays</p>
	<p>Case Management</p> <p>Family service coordinator provides case management; assists with BGE issues, eviction prevention, preparing parent's resumes, financial workshops</p>
	<p>Adult Education</p> <p>Y</p>

Location	Adult Education	Case Management	Child Care Assistance	Developmental and Health Screenings	Family Engagement Activities	Parenting Classes	Play Groups	Partnerships	Early Learning Educational Home Visits	Professional Development/ Support for Child Care Providers
Curtis Bay Elementary/ Middle School 4301 West Bay Avenue 21225	Workforce Development; GED program	Y	Y	Y	Y	Y	Toddler and Birth to Five	United Way; ShareBaby		
Dorothy L. Height Elementary School/ DRU Judy Center 2011 Linden Avenue 21217		Y	Y		Y		Y	ShareBaby, Bedtime in a Box, Leveling the Playing Field, Inc., The Maryland Book Bank, Break A Difference (Make?)	Y	
Eutaw Marshburn Elementary School 1624 Eutaw Place 21217	Y	Y	Y	Y	Y	Y	Y		Y	

Location	Adult Education	Case Management	Child Care Assistance	Developmental and Health Screenings	Family Engagement Activities	Parenting Classes	Play Groups	Partnerships	Early Learning Educational Home Visits	Professional Development/ Support for Child Care Providers
John Rurah Elementary/ Middle School 701 Rappolla Street 21224	Y	Y	Y	Y	Y	Y	Y		Y	
Lakeland Elementary School 2921 Stranden Road 21230	Y	Y	Y	Y	Y	Y	Y	ShareBaby, Bedtime in a Box (literacy through reading and bedtime routines), Ameri-group, BCCC, UMBC,	Y	

Location	Moravia Park Elementary School 6201 Frankford Avenue 21206
Adult Education	Y
Case Management	Y
Child Care Assistance	Y
Developmental and Health Screenings	Y
Family Engagement Activities	Y
Parenting Classes	Y
Play Groups	Mom's Club
Partnerships	Y
Early Learning Educational Home Visits	Y
Professional Development/ Support for Child Care Providers	

Appendix G: Infographic on Maryland EXCELS



Searching for quality child care and early education programs that promote school-readiness has never been easier, thanks to Maryland EXCELS!

Quality matters! The early years are critical when it comes to building social, emotional, thinking, and learning skills. Children with these skills are more likely to succeed in school and in life.

Maryland EXCELS builds upon the foundation of the State's rigorous child care licensing requirements. Every licensed program is inspected by the State at least once each year to ensure compliance with Maryland regulations.

Maryland EXCELS provides the opportunity for programs to demonstrate achievements that exceed state licensing requirements.

Upon review and verification, programs publish a rating from 1 to 5 (with 5 being the highest quality level) on the online Find a Program portal and in the Quality Finder mobile App.

Publishing a rating at any level, including level 1, demonstrates a program's commitment to continuous quality improvement.



Appendix H: Head Start Programs in Baltimore by Excels Level and Capacity

Head Start by Excels Level	Programs		Capacity		Infant Capacity (included in total)	
	Number of programs	Percent of programs	Number of children	Percent of children	Number of Infants	Percent of infants
Level 1	23	45%	1230	41%	13	25%
Level 2	12	24%	468	16%	15	29%
Level 3	9	18%	764	26%	12	23%
Level 4						0%
Level 5	3	6%	372	12%		0%
No published level	4	8%	146	5%	12	23%
Total	51		2980		52	

Program by Name and Excels Level 1	Address	Zip	Excels Level	Infant Capacity	Total Capacity
Y Head Start Baltimore City @ Edmondson Avenue	4501 Edmondson Ave	21229	1	0	20
Catholic Charities Head Start Baltimore City @ West Hamburg St.	765 W HAMBURG ST	21230	1	0	53
Catholic Charities Head Start Baltimore City @ Wilkens Ave.	2612 WILKENS AVE	21223	1	0	60
Herring Run @ Bowley's Site	5010 BOWLEYS LN	21206	1	0	90
Catholic Charities Head Start Baltimore City @ Hollins St.	1800 HOLLINS ST	21223	1	0	20
Catholic Charities Head Start Baltimore City @ Sterrett St.	915 STERRETT ST	21230	1	0	36
Y Of Central Md Head Start @ Liberty ES	3901 MAINE AVE	21207	1	0	37
Dayspring Head Start @ Gardenville	5427 BELAIR RD	21206	1	0	54
Y Head Start Baltimore City @ Linden Ave	2011 Linden Ave	21217	1	0	20
Catholic Charities Head Start Baltimore City @ Dukeland St.	1501 N DUKELAND ST	21216	1	0	72
Catholic Charities Head Start Baltimore City @ Harlem Ave.	1500 HARLEM AVE	21217	1	0	120
Catholic Charities Head Start Baltimore City @ Joseph Ave.	2920 JOSEPH AVE	21225	1	0	59

Program by Name and Excels Level 1	Address	Zip	Excels Level	Infant Capacity	Total Capacity
Catholic Charities Head Start Baltimore City @ Sethlow Rd.	2707 SETHLOW AVE	21225	1	0	51
Catholic Charities Head Start Baltimore City @ Washburn Ave.	224 WASHBURN AVE	21225	1	0	92
Catholic Charities Head Start Baltimore City @ West Bay St.	4301 WEST BAY ST.	21225	1	0	32
Dayspring Head Start @ Dunbar	621 N EDEN ST	21205	1	0	47
Y Baltimore City Head Start @ West Preston	507 W PRESTON ST	21201	1	0	77
Dayspring Head Start @ Patterson Park	1125 N PATTERSON PARK AVE	21213	1	0	73
Dayspring Head Start @ Eutaw Marshburn	1624 N EUTAW PL	21217	1	0	68
Y Baltimore City Head Start @ Pennsylvania Ave	1200 Pennsylvania Ave	21217	1	0	20
Waverly Early Head Start Center Of Goodwill	829 MONTEPELIER ST	21218	1	7	15
Dayspring Head Start @ Dukeland	2803 N DUKELAND ST	21216	1	6	74
Subtotal, Level 1: 23 Programs				13 infants	1230 children

Program by Name and Excels Level 2	Address	Zip	Excels Level	Infant Capacity	Total Capacity
Catholic Charities Head Start Baltimore City @ Lafayette Ave	2848 W. LaFayette Ave	21216	2	0	51
Catholic Charities Head Start Baltimore City @ Schroeder St	31 SCHROEDER ST	21223	2	0	20
Dayspring Head Start @ Harford Heights/Harford Heights Annex	1919 N BROADWAY	21213	2	0	117
Dayspring Head Start @ St Williams Of York	600 COOKS LN	21229	2	0	68
Y Baltimore City Head Start @ Hilton St.	3935 HILTON RD	21215	2	0	20
Y Baltimore City Head Start @ Leith Walk Es	1235 SHERWOOD RD	21239	2	0	40
Y Baltimore City Head Start @ North Bend	181 NORTH BEND RD	21229	2	0	40
Y Baltimore City Head Start @ Yorkwood	5931 YORKWOOD RD	21239	2	0	20
Y Baltimore City Head Start @ Dickey Hill	5025 DICKEY HILL RD	21207	2	0	20
Y Of Central Maryland Emily Price Jones Head Start	1900 EDGEWOOD ST	21216	2	0	36
Our House Early Head Start	2707 Sethlow Rd	21225	2	9	21
Baltimore City Health Department Early Head Start, Monroe St.	2200 N. Monroe St	21217	2	6	15
Subtotal, Level 2: 12 Programs				15 infants	468 children

Program by Name and Excels Level 3	Address	Zip	Excels Level	Infant Capacity	Total Capacity
Southeast Early Head Start Center	100 N CHESTER ST	21231	3	12	30
St Vincent De Paul Head Start @ Southeast Patterson Park	242 S PATTERSON PARK AVE	21231	3	0	124
Y Of Central Md Head Start @ Matthew Henson ES	1600 N. PAYSON ST.	21217	3	0	17
St Vincent De Paul Head Start @ Pimlico	5001 PARK HEIGHTS AVE	21215	3	0	87
St Vincent De Paul Head Start @ Fatima	6400 E PRATT ST	21224	3	0	200
St Vincent De Paul Head Start, N. Caroline	1427 N CAROLINE ST	21213	3	0	210
St Vincent De Paul Head Start, N. Caroline	1415 N CAROLINE ST	21213	3	0	20
Y Baltimore City Head Start @ Henderson Hopkins ECC	4605 BELAIR RD	21206	3	0	36
Y Baltimore City Head Start @ North Chester	100 N CHESTER ST	21231	3	0	40
Subtotal, Level 3: 9 Programs				12 infants	764 children

Program by Name and Excels Level 5	Address	Zip	Excels Level	Infant Capacity	Total Capacity
Union Baptist Harvey Johnson Head Start	1211 DRUID HILL AVE	21217	5	0	175
Emily Price Jones Head Start/YMCA, Elgin Ave	2030 ELGIN AVE	21217	5	0	120
St Vincent De Paul Head Start III @ Arts Center	4330 C PIMILICO RD	21215	5	0	77
Subtotal, Level 5: 3 Programs					372 children

Program by Name and Excels Level: No published level	Address	Zip	Excels Level	Infant Capacity	Total Capacity
St. Vincent De Paul Early Head Start Center, Pimlico	4330 D Pimlico Rd.	21215		12	22
St Vincent De Paul Head Start, Arlington	3705 W ROGERS AVE	21215		0	40
Catholic Charities Head Start Baltimore City @ Round Road	2400 Round Rd.	21225		0	60
PACT: Helping Children W/Special Needs Therapeutic Nursery EHS	1114 N. Mount St.	21213		0	24
Subtotal, No Published Level: 4 Programs				12 infants	146 children

Source: Maryland Family Network, MD LOCATE Child Care, November, 2019