

Data Presentation and Discussion

Bureau of Child Development and Head Start Collaboration State Leadership Team meeting
January 16, 2025

Contributors

Jess Carson, PhD

Research Assistant Professor

Carsey School of Public Policy, UNH

Nicole Heller, PhD

Senior Policy Analyst

New Hampshire Fiscal Policy Institute

Tyrus Parker, MA

Research Scientist II

Carsey School of Public Policy, UNH

Theresa Peck, PMP

Business Analyst I

BCDHSC, NH DHHS

Harshita Sarup, MPP

Research Scientist II

Carsey School of Public Policy, UNH



*** How has licensed supply changed over time?**



In New Hampshire, the number of **licensed slots declined by 2%** between 2017 and 2024.



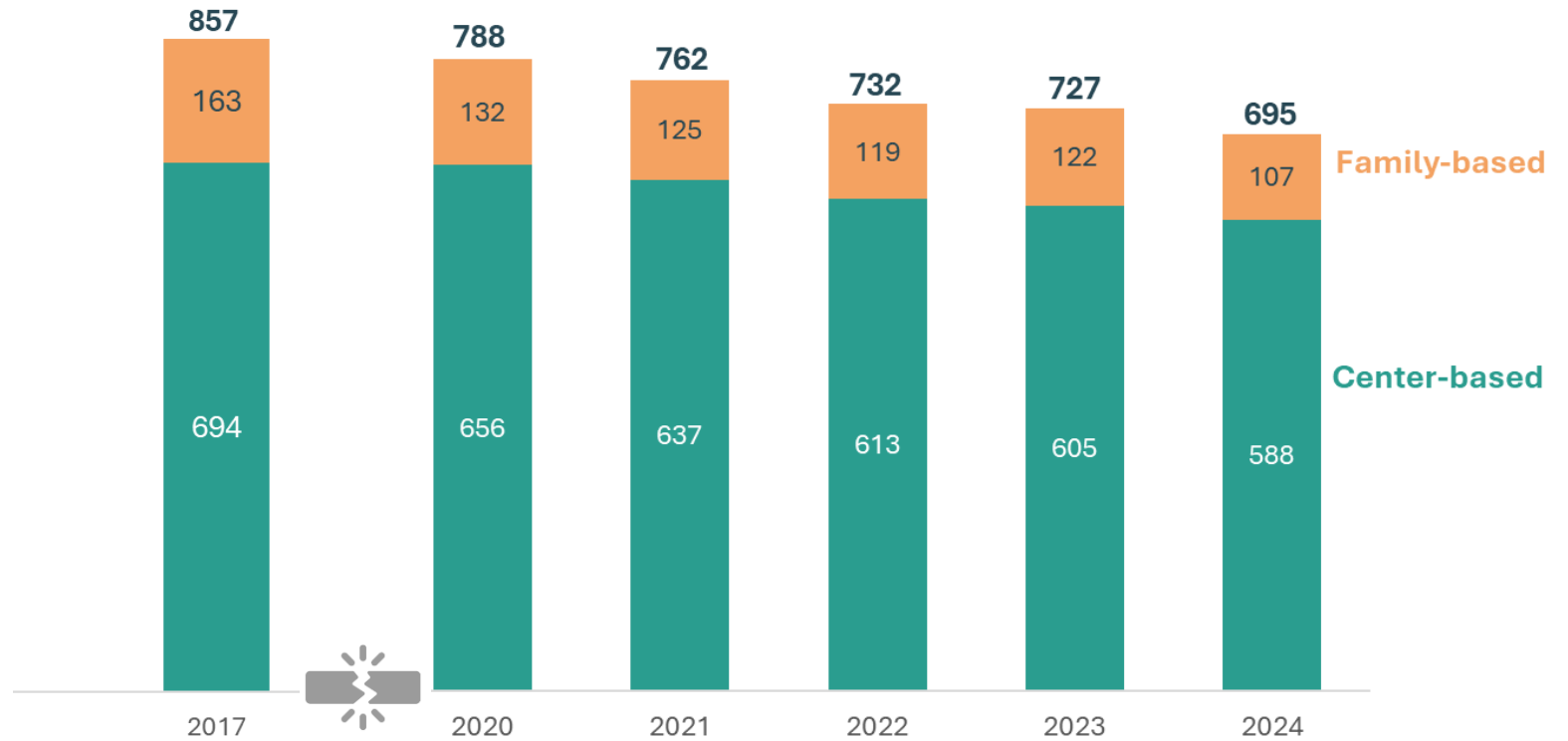
The number of **licensed providers dropped by 19%** in that same period.



The disparity is a result of disproportionate closures among smaller providers.

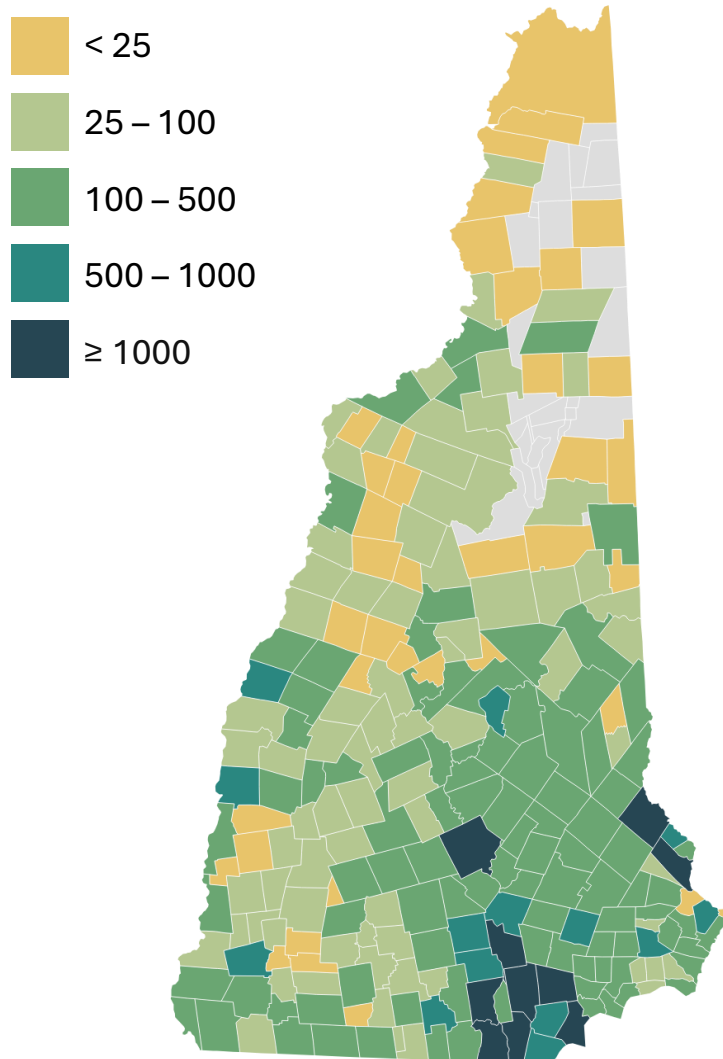
Family-based providers are dwindling at a (relatively) faster pace than **center-based providers** (↓ 34% vs. ↓ 15%).

Number of licensed providers, total and by type, 2017 and 2020 - 2024

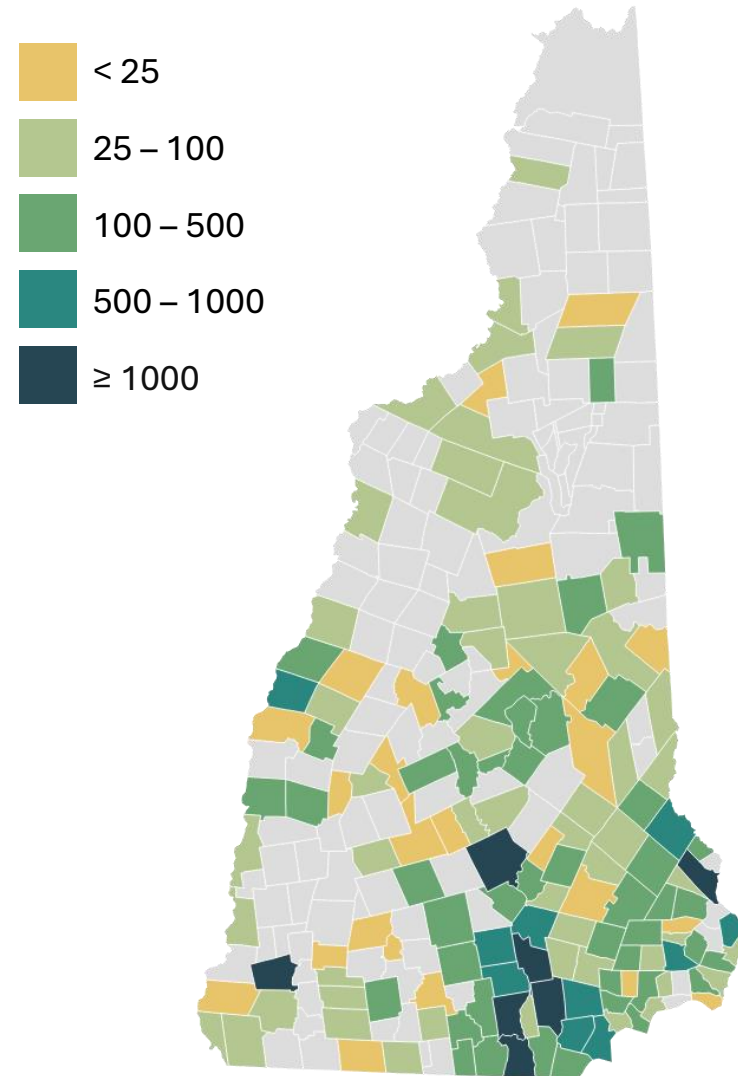


**What do we know about the relationship
between licensed slots & where people live?**

Number of children under 5 by municipality

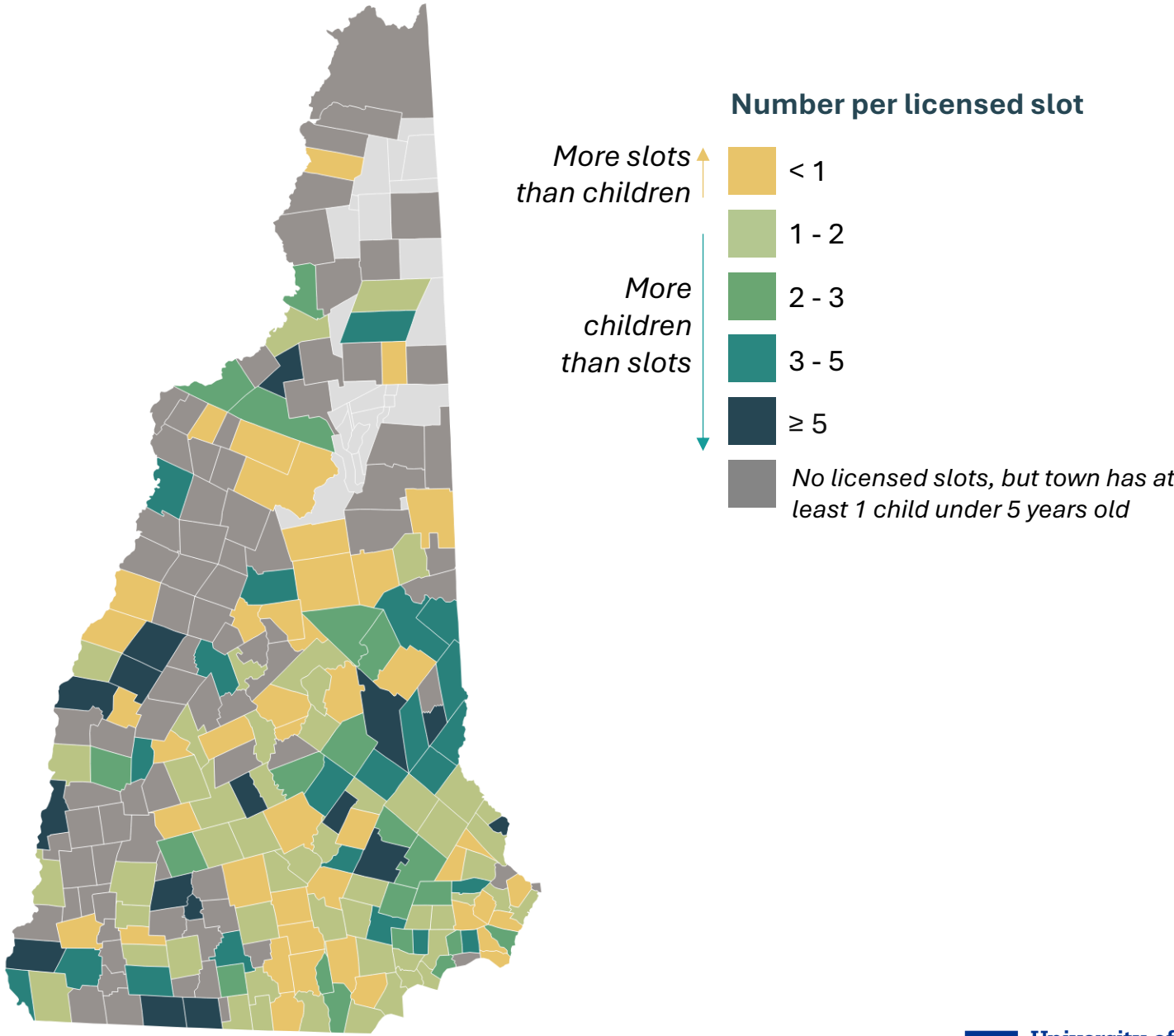


Number of licensed slots among providers serving children under age 5



Source: Carsey School of Public Policy maps of NH Vital Statistics, 2019 – 2023; NH DHHS BCDHSC, October 2024. Note (left): Number of children estimated from births to NH residents from full calendar years 2019-2023. Gray towns have no reported births.

Number of children under age 5 per licensed slot

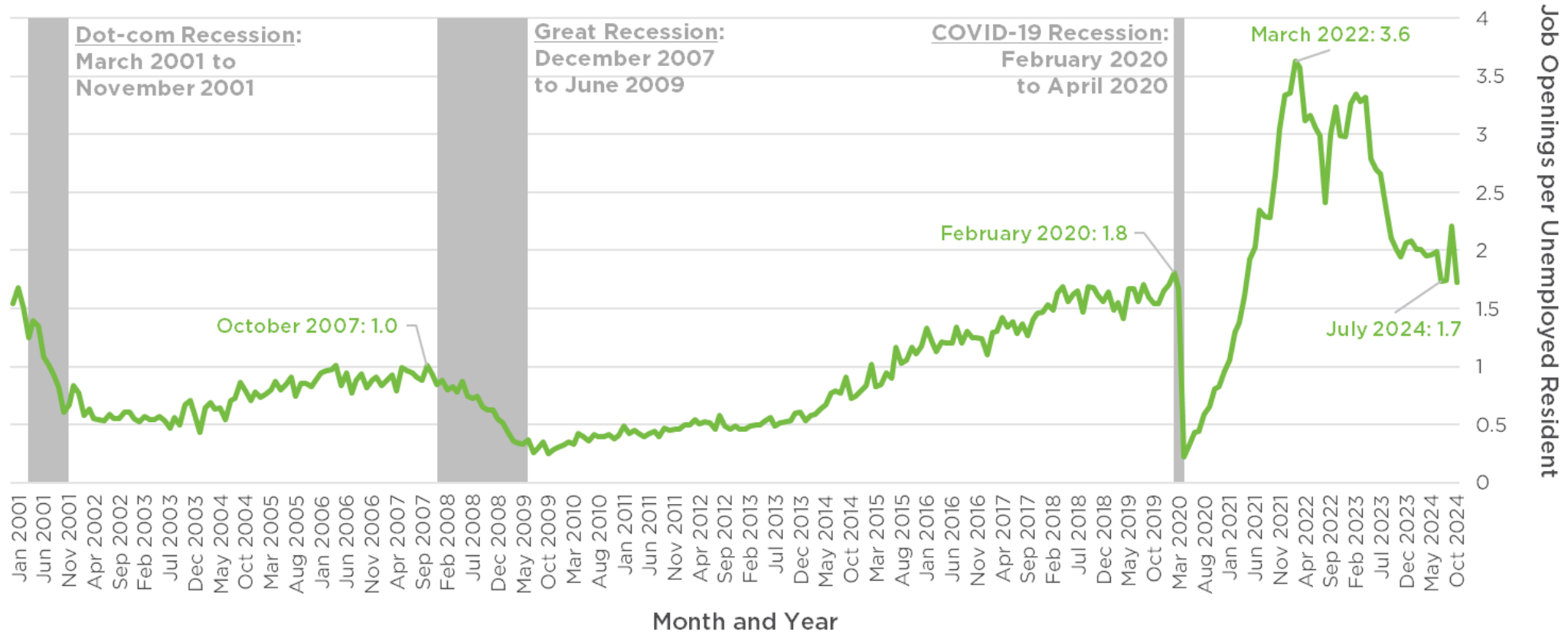


Source: NH Vital Statistics, 2019 – 2023; NH DHHS BCDHSC October 2024
Note: Includes births to NH residents in past five (complete) years. Light gray areas indicate towns with no births in past five years

What do we know about where (and what kind of) jobs are growing?

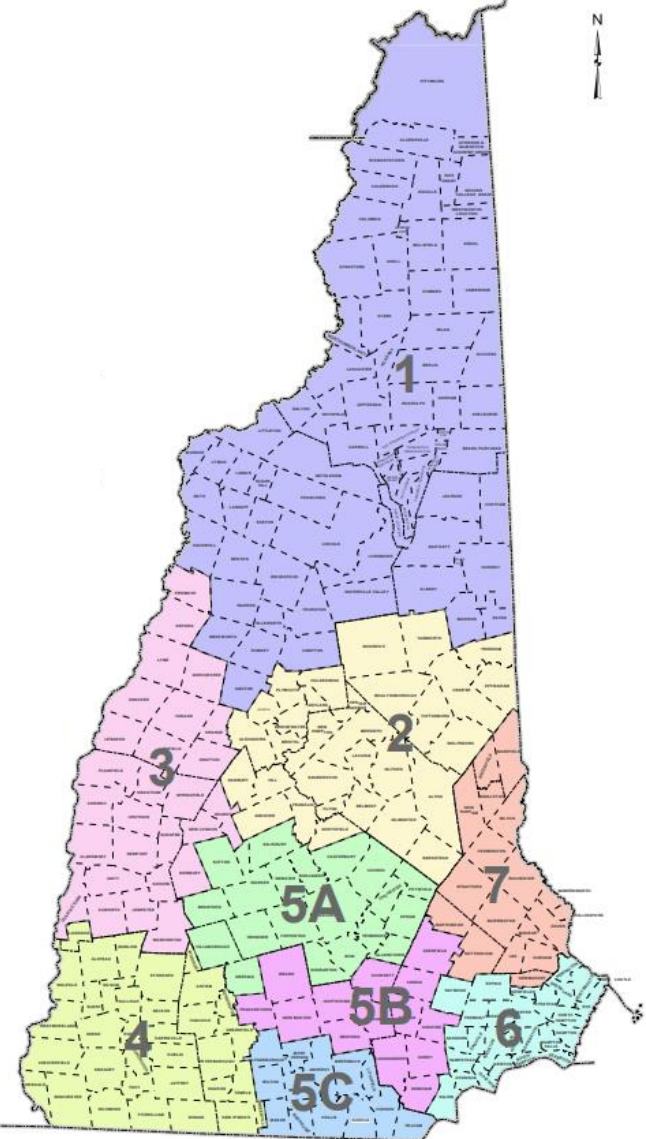
NEW HAMPSHIRE FACES A LABOR FORCE SHORTAGE THROUGHOUT THE ECONOMY

NUMBER OF JOB OPENINGS PER NEW HAMPSHIRE RESIDENT ACTIVELY SEEKING WORK



Sources: U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics and Job Openings and Labor Turnover Survey. Seasonally Adjusted, data retrieved January 2025; National Bureau of Economic Research

PLANNING REGIONS



OCCUPATIONAL PROJECTIONS ACROSS ALL REGIONS BETWEEN 2020 AND 2030

COMMON AVERAGE ANNUAL OPENINGS

- Cashiers
- Retail Salespersons
- Waiters and Waitresses
- Fast Food & Counter Workers
- Restaurant Cooks
- Maids and Housekeeping Cleaners
- Stockers and Order Fillers
- General Office Clerks
- Home Health and Personal Care Aides
- Janitors and Cleaners

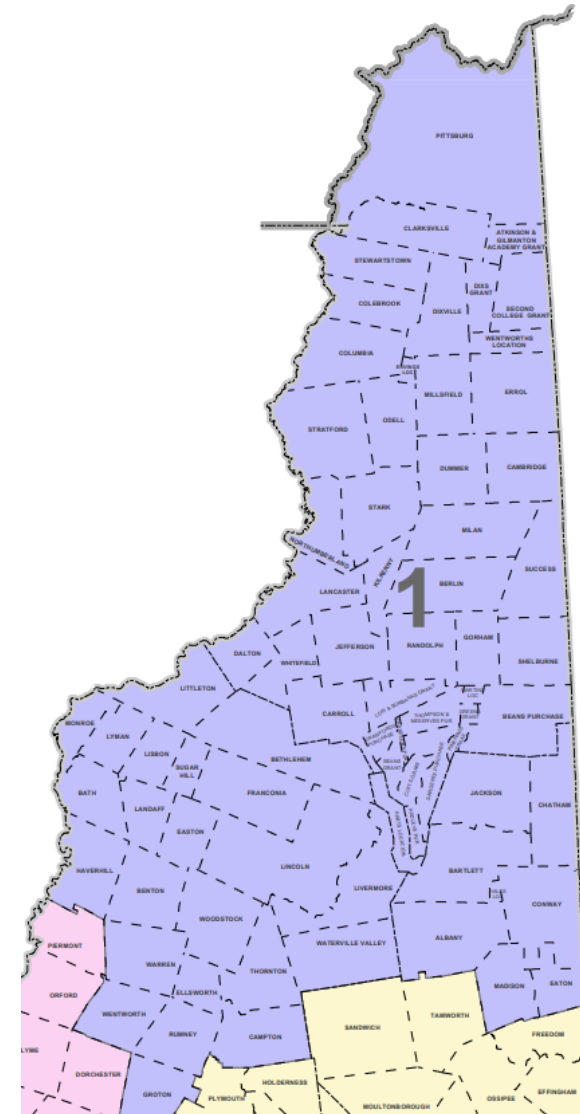
CONSISTENT THEMES

- Lower paying occupations
- Hourly, shift work
- Non-traditional work hours

PLANNING REGION 1: NORTH COUNTRY 2020 TO 2030 OCCUPATIONAL PROJECTIONS

TOP 10 AVERAGE ANNUAL OPENINGS

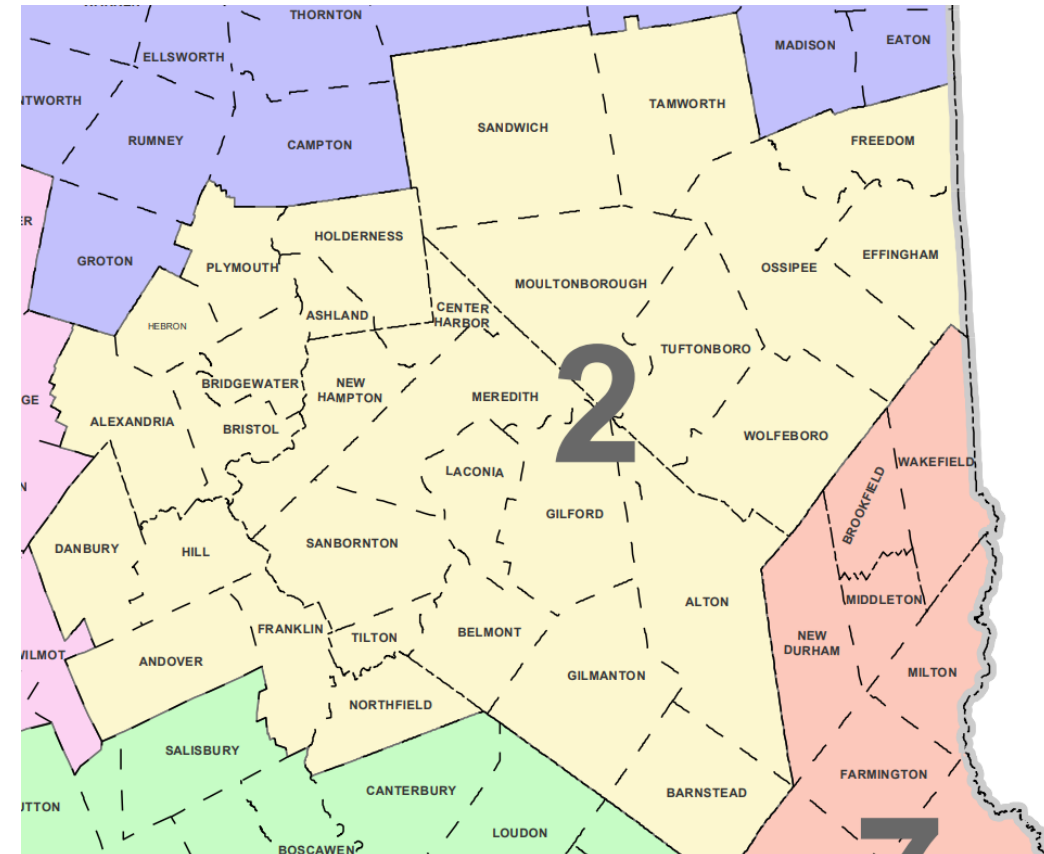
1. CASHIERS (215)
 2. RETAIL SALESPERSONS (198)
 3. WAITERS & WAITRESSES (194)
 4. FAST FOOD & COUNTER WORKERS (153)
 5. COOKS, RESTAURANT (118)
 6. MAIDS & HOUSEKEEPING CLEANERS (110)
 7. STOCKERS & ORDER FILLERS (104)
 8. OFFICE CLERKS, GENERAL (90)
 9. HOME HEALTH & PERSONAL CARE AIDES (82)
 10. BARTENDERS (77)
-
24. "CHILD CARE WORKERS" (49)



PLANNING REGION 2: LAKES REGION 2020 TO 2030 OCCUPATIONAL PROJECTIONS

TOP 10 AVERAGE ANNUAL OPENINGS

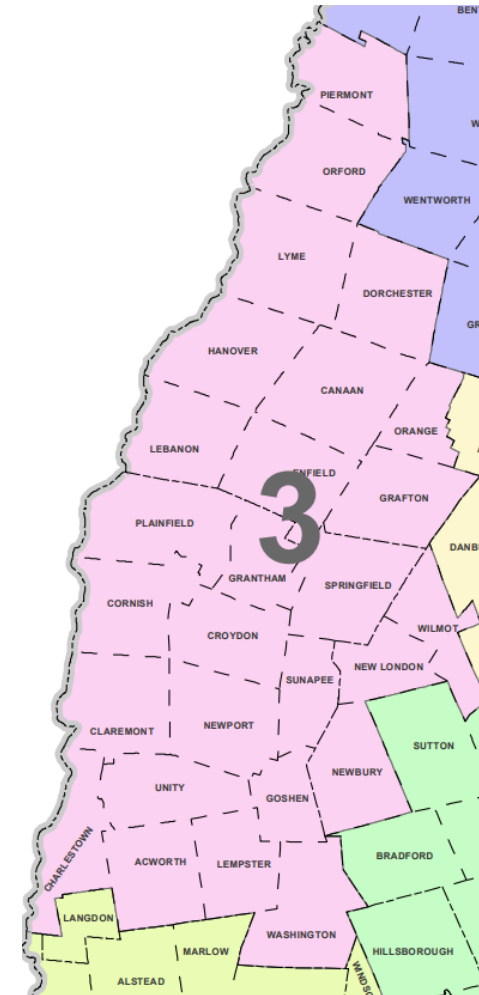
1. CASHIERS (322)
 2. WAITERS & WAITRESSES (236)
 3. RETAIL SALESPERSONS (235)
 4. FAST FOOD & COUNTER WORKERS (193)
 5. HOME HEALTH & PERSONAL CARE AIDES (185)
 6. LANDSCAPING & GROUNDSKEEPING WORKERS (168)
 7. OFFICE CLERKS, GENERAL (129)
 8. STOCKERS & ORDER FILLERS (127)
 9. JANITORS & CLEANERS (117)
 10. COOKS, RESTAURANT (113)
-
22. "CHILD CARE WORKERS" (63)



PLANNING REGION 3: UPPER VALLEY - LAKE SUNAPEE 2020 TO 2030 OCCUPATIONAL PROJECTIONS

TOP 10 AVERAGE ANNUAL OPENINGS

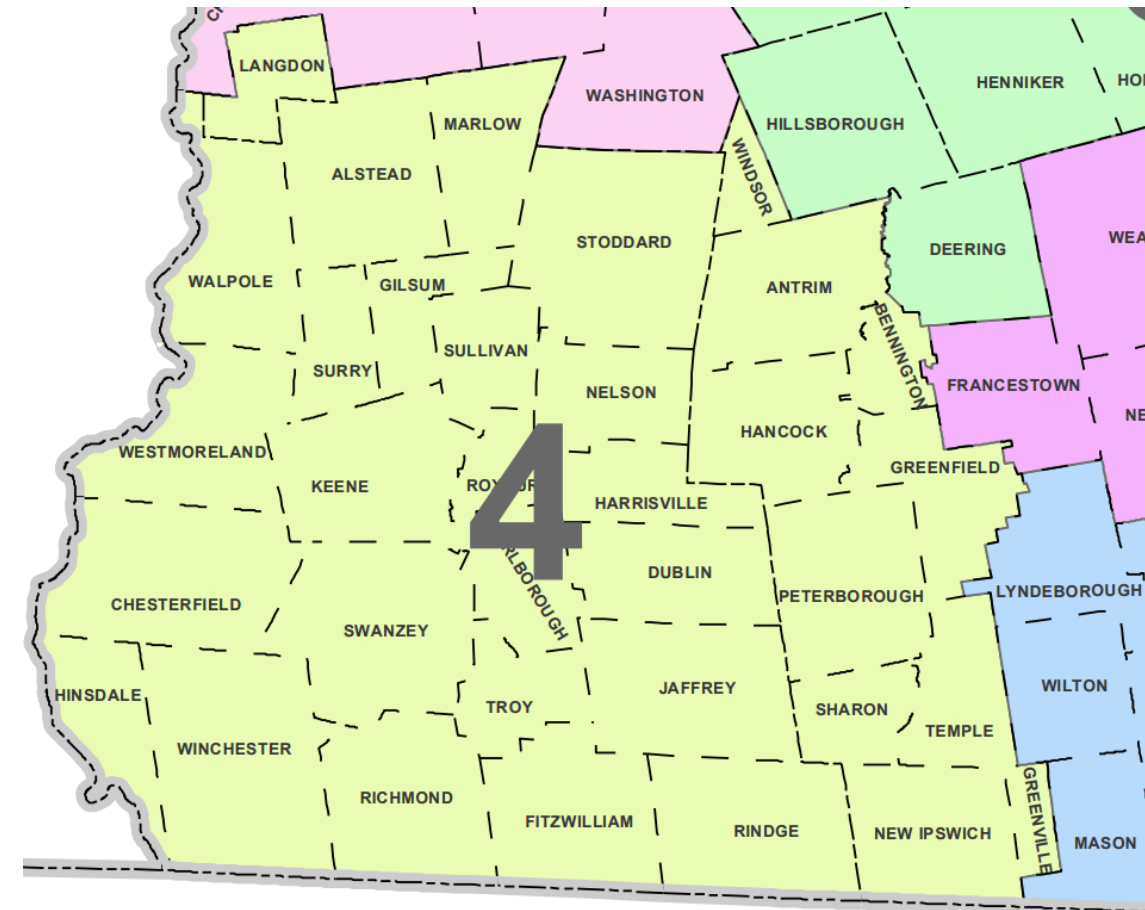
1. CASHIERS (192)
 2. FAST FOOD & COUNTER WORKERS (161)
 3. RETAIL SALESPERSONS (145)
 4. WAITERS & WAITRESSES (120)
 5. STOCKERS & ORDER FILLERS (115)
 6. JANITORS & CLEANERS (114)
 7. NURSING ASSISTANTS (112)
 8. OFFICE CLERKS, GENERAL (110)
 9. MAIDS & HOUSING KEEPING CLEANERS (82)
 10. TEACHING ASSISTANTS (EXCEPT POSTSECONDARY) (78)
-
20. "CHILD CARE WORKERS" (50)



PLANNING REGION : SOUTHWEST 2020 TO 2030 OCCUPATIONAL PROJECTIONS

TOP 10 AVERAGE ANNUAL OPENINGS

1. CASHIERS (207)
 2. STOCKERS & ORDER FILLERS (154)
 3. FAST FOOD & COUNTER WORKERS (149)
 4. RETAIL SALESPERSONS (141)
 5. WAITERS & WAITRESSES (127)
 6. OFFICE CLERKS, GENERAL (122)
 7. HOME HEALTH & PERSONAL CARE AIDES (97)
 8. JANITORS & CLEANERS (93)
 9. MISC ASSEMBLERS & FABRICATORS (89)
 10. NURSING ASSISTANTS (85)
-
44. "CHILD CARE WORKERS" (45)

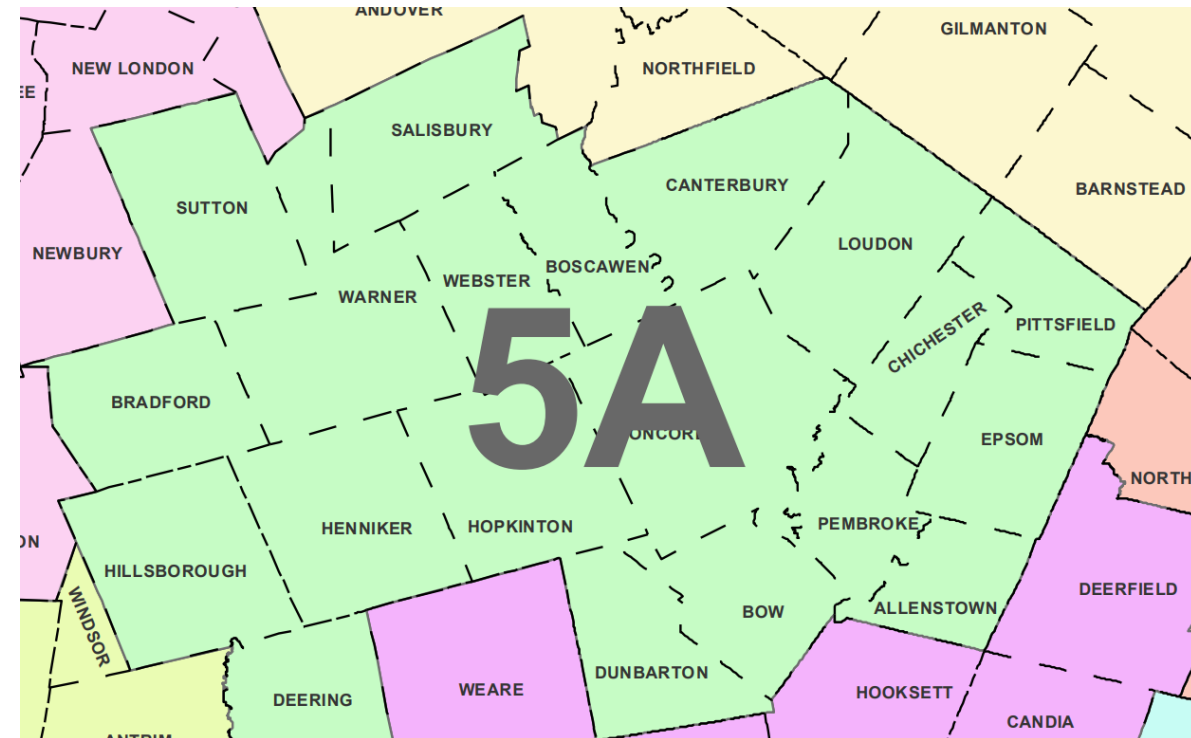


PLANNING REGION : CENTRAL NEW HAMPSHIRE 2020 TO 2030 OCCUPATIONAL PROJECTIONS

TOP 10 AVERAGE ANNUAL OPENINGS

1. HOME HEALTH & PERSONAL CARE AIDES (267)
2. CASHIERS (248)
3. FAST FOOD & COUNTER WORKERS (246)
4. STOCKERS & ORDER FILLERS (212)
5. RETAIL SALESPERSONS (208)
6. OFFICE CLERKS, GENERAL (190)
7. GENERAL & OPERATIONS MANAGERS (155)
8. JANITORS & CLEANERS (148)
9. FARMWORKERS & LABORERS, CROP, NURSERY, & GREENHOUSE
10. WAITERS & WAITRESSES

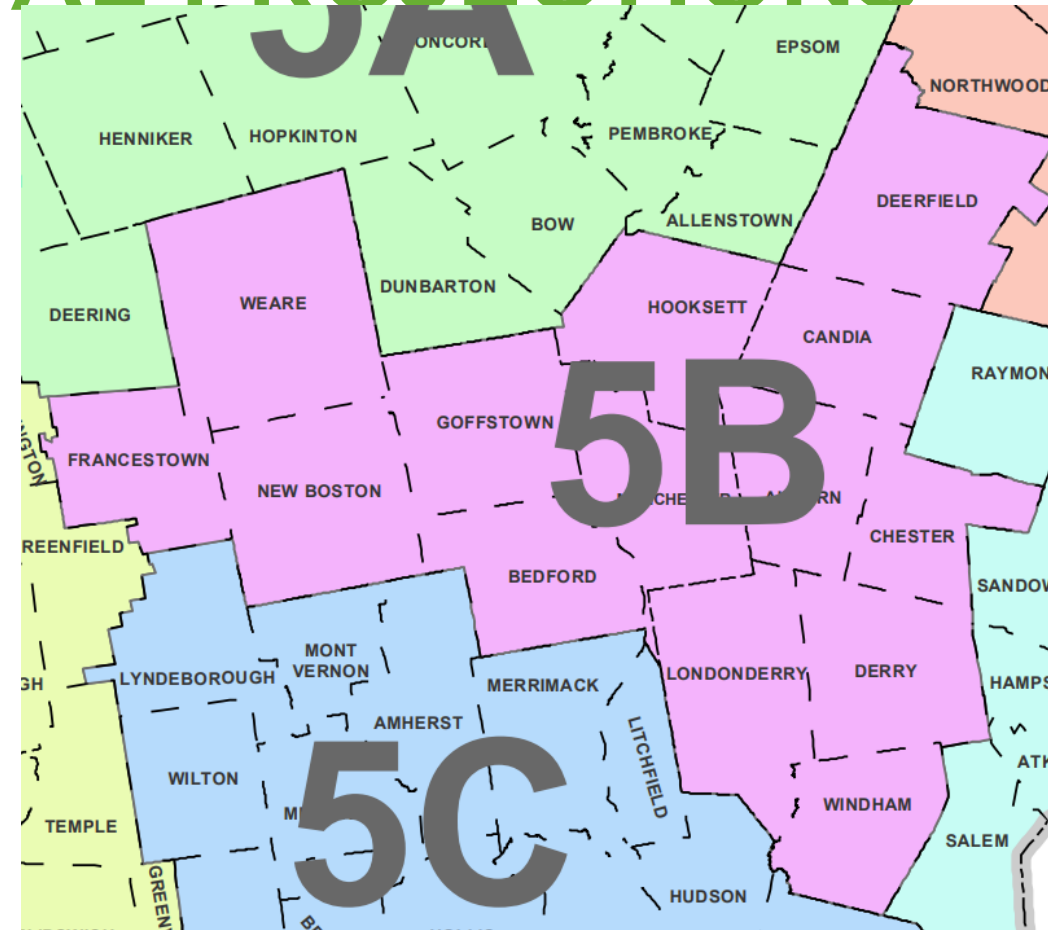
32. "CHILD CARE WORKERS" (51)



PLANNING REGION : SOUTHERN NEW HAMPSHIRE 2020 TO 2030 OCCUPATIONAL PROJECTIONS

TOP 10 AVERAGE ANNUAL OPENINGS

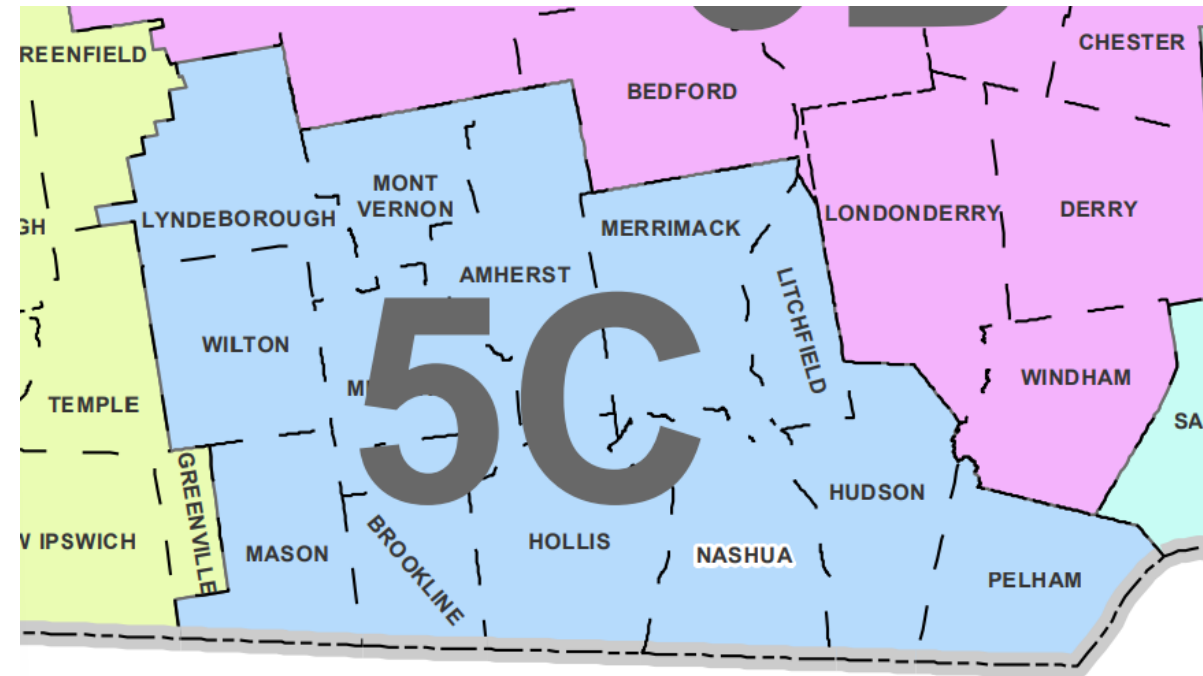
1. FAST FOOD & COUNTER WORKERS (697)
 2. CASHIERS (554)
 3. STOCKERS & ORDER FILLERS (449)
 4. RETAIL SALESPERSONS (446)
 5. OFFICE CLERKS, GENERAL (424)
 6. WAITERS & WAITRESSES (388)
 7. CUSTOMER SERVICE REPRESENTATIVES (338)
 8. HOME HEALTH & PERSONAL CARE AIDES (302)
 9. JANITORS & CLEANERS (282)
 10. LABORERS & FREIGHT, STOCK, & MATERIAL MOVERS, HAND (282)
-
34. "CHILD CARE WORKERS" (107)



PLANNING REGION : NASHUA REGIONAL 2020 TO 2030 OCCUPATIONAL PROJECTIONS

TOP 10 AVERAGE ANNUAL OPENINGS

1. CASHIERS (576)
 2. RETAIL SALESPERSONS (514)
 3. FAST FOOD & COUNTER WORKERS (502)
 4. SOFTWARE DEVELOPERS & SOFTWARE QUALITY ASSURANCE ANALYSTS & TESTERS (390)
 5. STOCKERS & ORDER FILLERS (379)
 6. WAITERS & WAITRESSES (286)
 7. CUSTOMER SERVICE REPRESENTATIVES (247)
 8. OFFICE CLERKS, GENERAL (244)
 9. HOME HEALTH & PERSONAL CARE AIDES (194)
 10. JANITORS & CLEANERS (183)
-
41. "CHILD CARE WORKERS" (69)

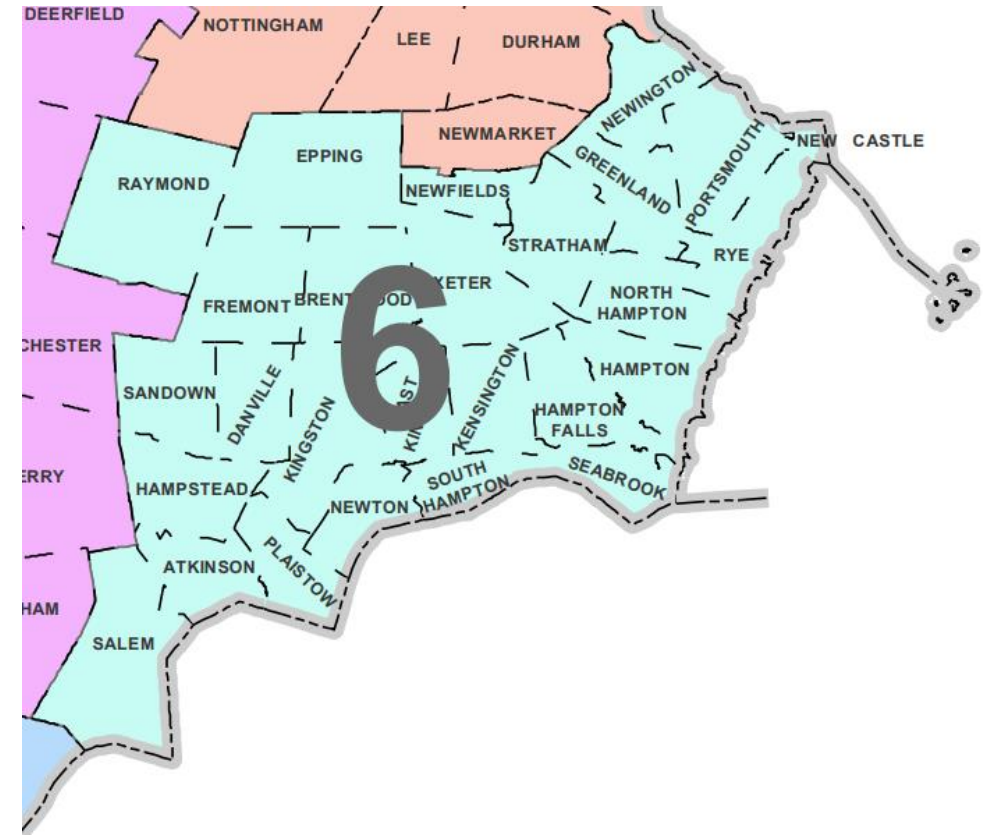


PLANNING REGION : ROCKINGHAM 2020 TO 2030 OCCUPATIONAL PROJECTIONS

TOP 10 AVERAGE ANNUAL OPENINGS

1. CASHIERS (804)
2. RETAIL SALESPERSONS (658)
3. FAST FOOD & COUNTER WORKERS (602)
4. STOCKERS & ORDER FILLERS (562)
5. WAITERS & WAITRESSES (347)
6. OFFICE CLERKS, GENERAL (327)
7. CUSTOMER SERVICE REPRESENTATIVES (253)
8. GENERAL & OPERATIONS MANAGERS (251)
9. COOKS, RESTAURANT (207)
10. HEAVY & TRACTOR-TRAILER TRUCK DRIVERS (200)

41. "CHILD CARE WORKERS" (90)

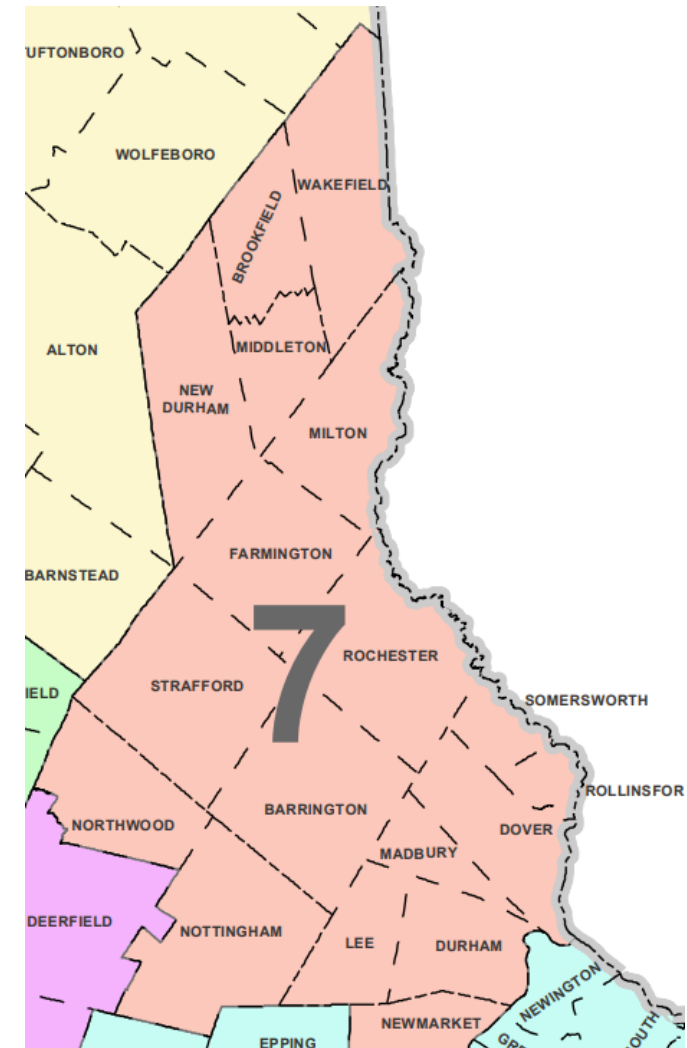


PLANNING REGION : STRAFFORD


2020 TO 2030 OCCUPATIONAL PROJECTIONS

TOP 10 AVERAGE ANNUAL OPENINGS

1. FAST FOOD & COUNTER WORKERS (371)
 2. CASHIERS (301)
 3. WAITERS & WAITRESSES (199)
 4. STOCKERS & ORDER FILLERS (197)
 5. RETAIL SALESPERSONS (176)
 6. OFFICE CLERKS, GENERAL (137)
 7. JANITORS & CLEANERS (120)
 8. COOKS, RESTAURANT (118)
 9. TEACHING ASSISTANTS (EXCEPT POSTSECONDARY) (96)
 10. MAIDS & HOUSEKEEPING CLEANERS (90)
-
22. "CHILD CARE WORKERS" (61)



Does the data reflect slots that could actually be filled?

Ages Served and Capacity ? 

Total Licensed Capacity: 80

Age Group	Capacity	Available Slots
Infant		
Toddler		
Preschool		
School Age		

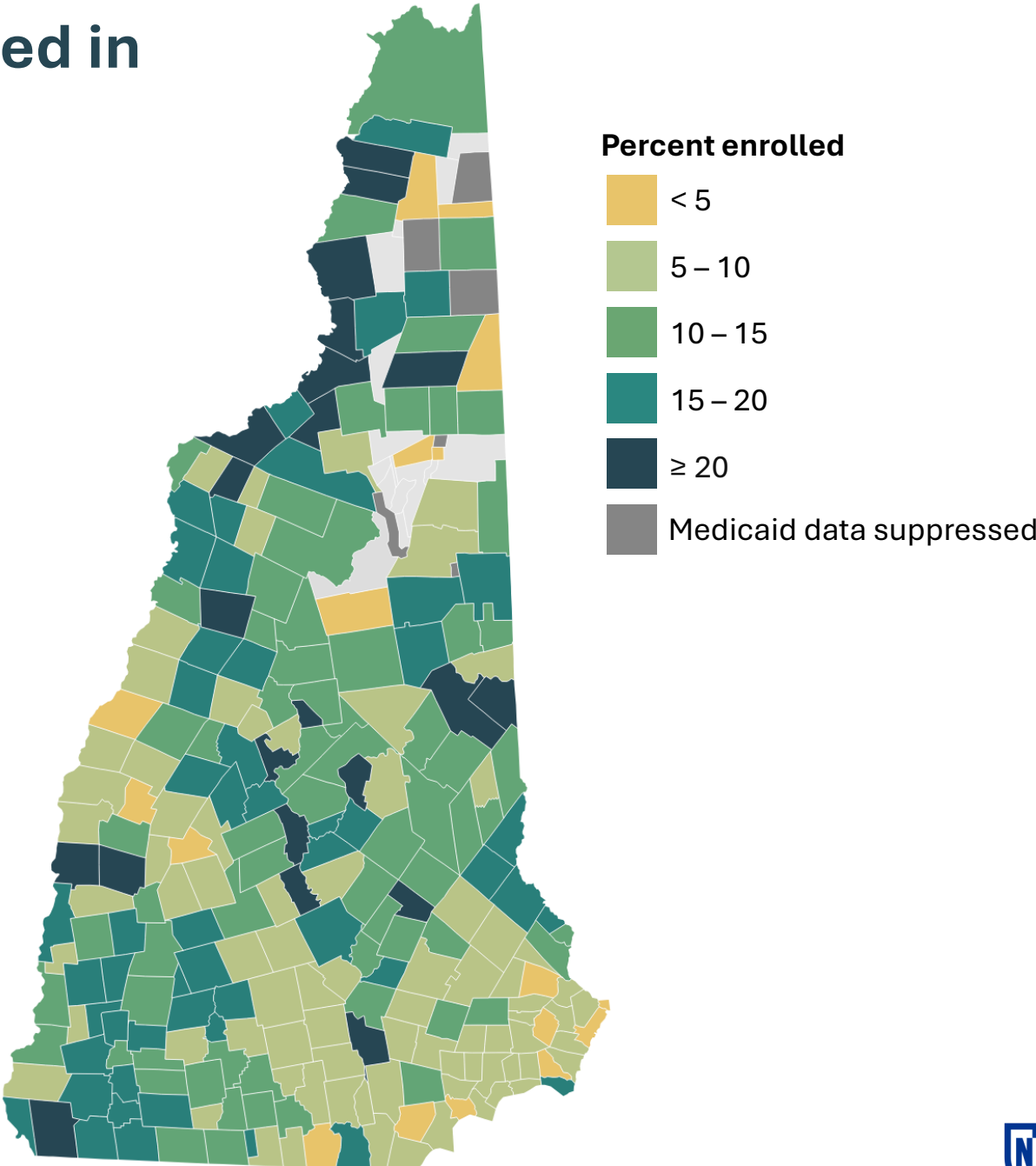
The infrastructure for collecting data on vacancies now exists in NHCIS provider profiles!

However, providers may interpret “available slots” differently and may update at uneven intervals, so point-in-time data may not capture the full picture.

Adding clarification to this field will help!

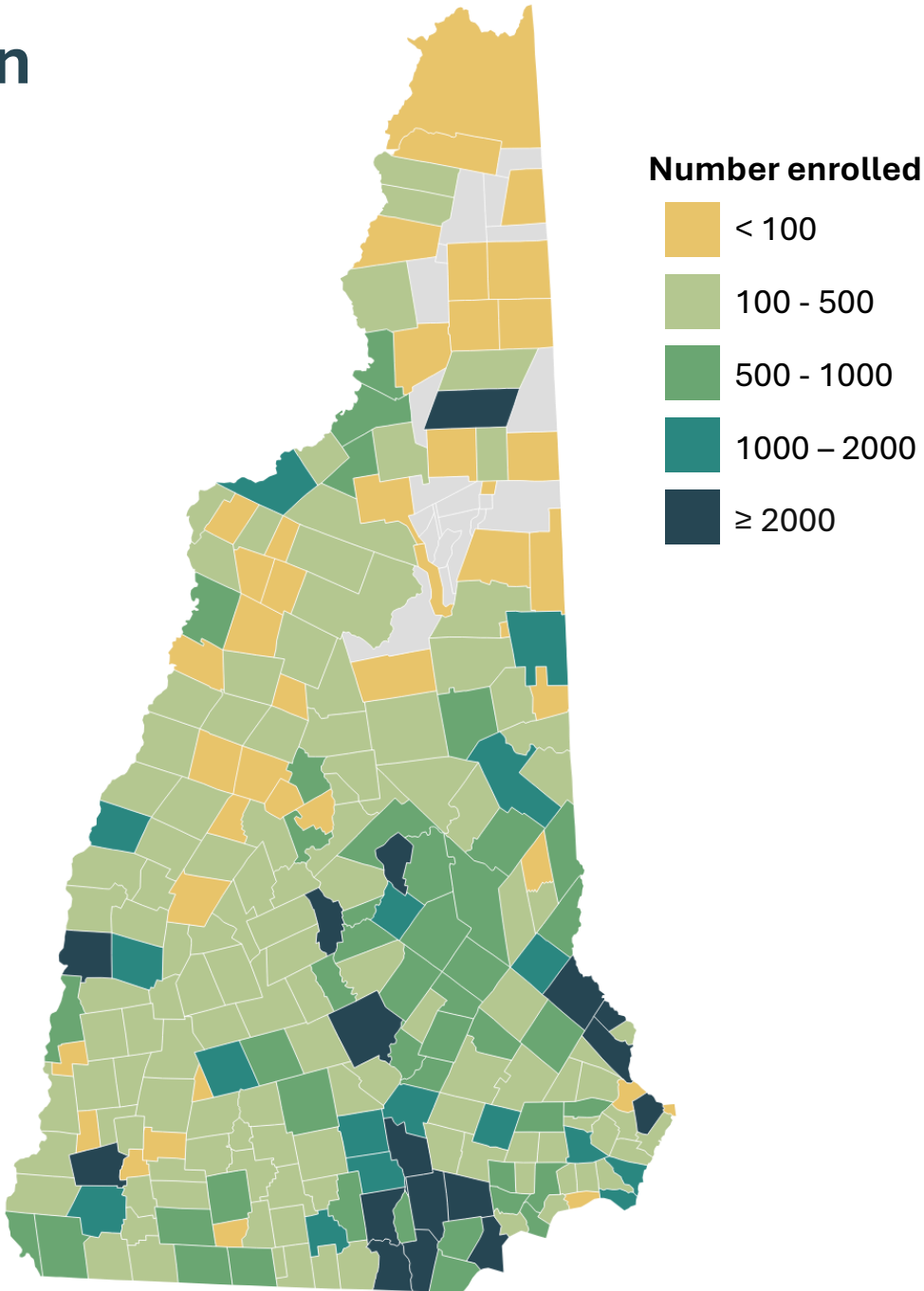
Where is the need for child care scholarships?

Percent of population enrolled in Medicaid by municipality



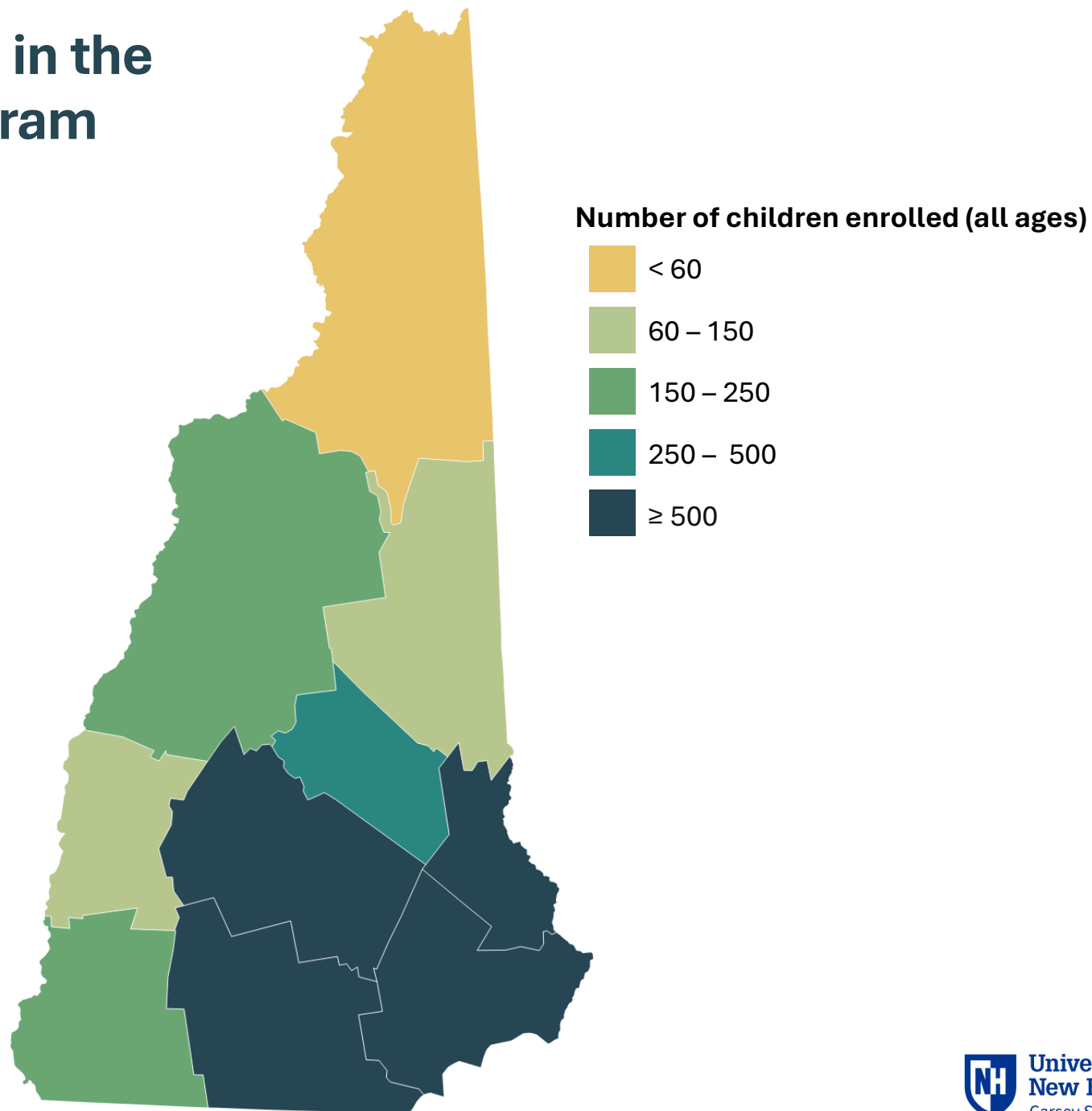
Source: Carsey School of Public Policy map of U.S. Census Bureau, Population Estimates 2023. NH DHHS Medicaid Enrollment Data for November 2024. Towns in light gray have no Medicaid enrollments; these towns typically have very small populations. Towns with suppressed data have fewer than five people enrolled.

Number of people enrolled in Medicaid by municipality



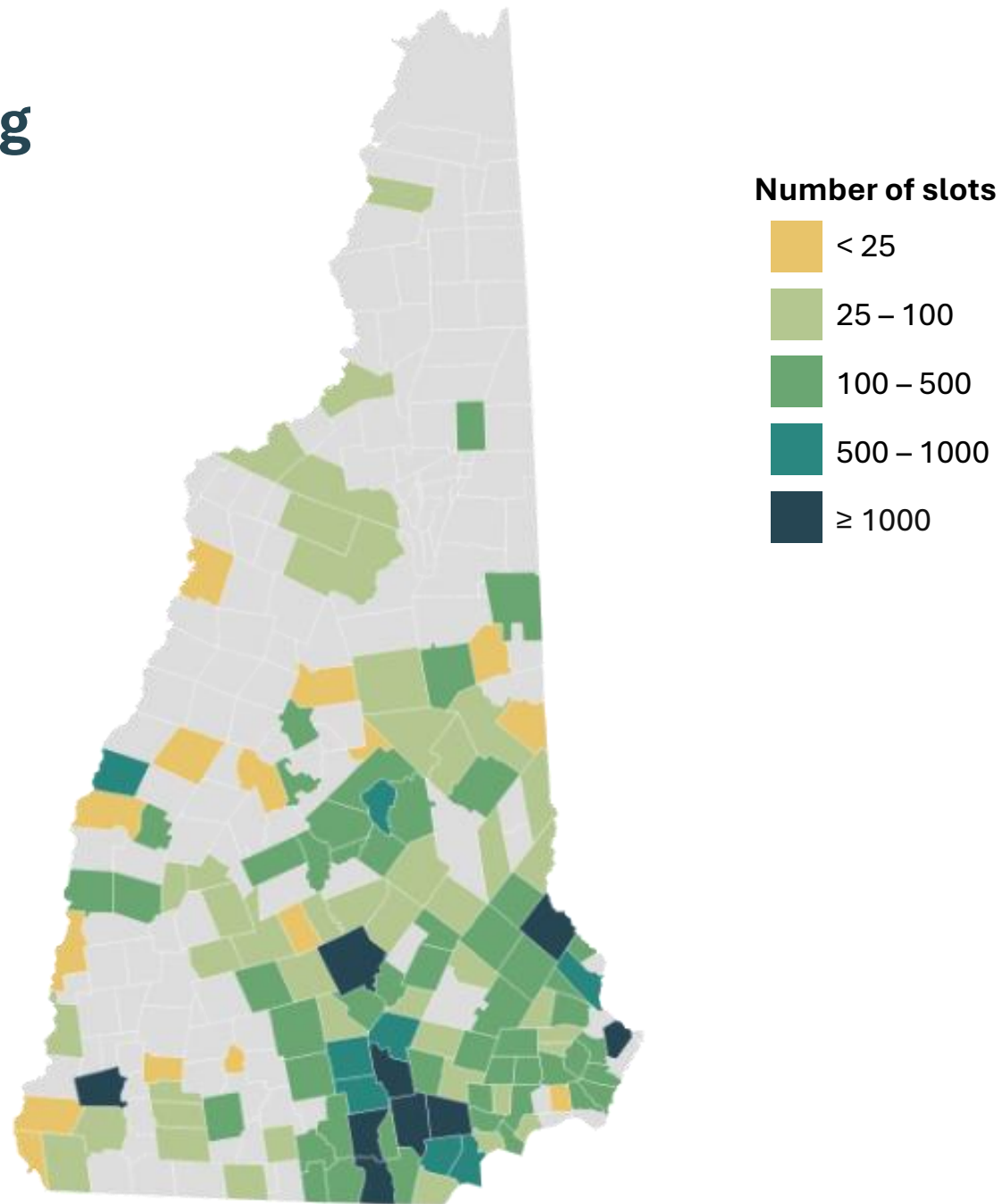
Source: Carsey School of Public Policy map of NH DHHS Medicaid Enrollment Data for November 2024. Towns in light gray have no Medicaid enrollments, these towns typically have very small populations.

Number of children enrolled in the Child Care Scholarship Program by county



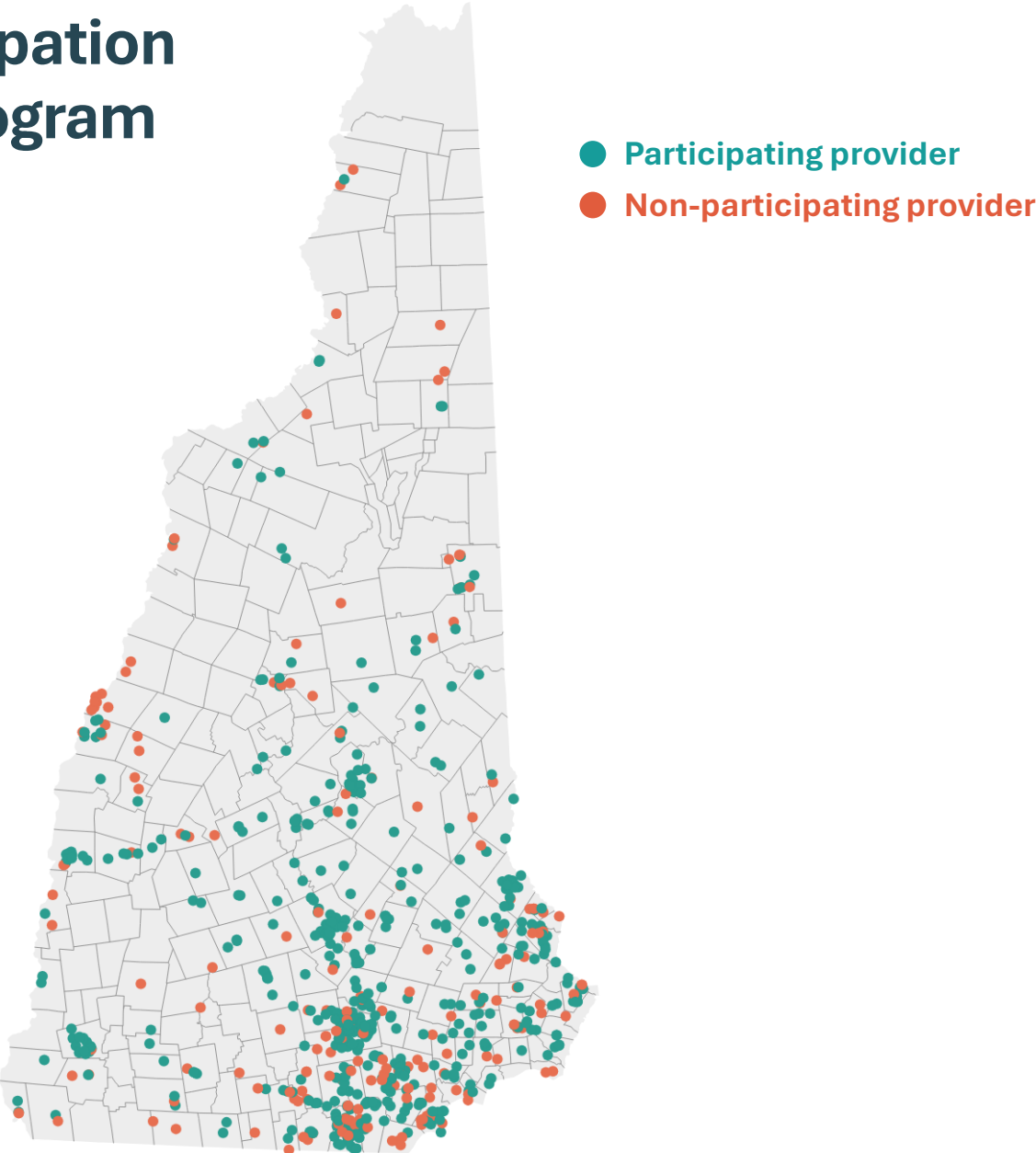
Where do scholarship slots exist?

Number of licensed slots among providers participating in the New Hampshire Child Care Scholarship Program



Source: Carsey School of Public Policy map of data from NH DHHS BCDHSC. Notes: List of licensed providers is from October 2024, matched with license numbers of providers participating in NH CCSP from May 2024. See Note 1 in "Notes" slide for more detail.

Licensed providers by participation in Child Care Scholarship Program



Source: Carsey School of Public Policy map of data from NH DHHS BCDHSC.
Notes: List of licensed providers is from October 2024, matched with license numbers of providers participating in NH CCSP from May 2024. See Note 1 in “Notes” slide for more detail.

How many of the “CCDF slots” are filled?



Providers do not always reserve a specific share of slots for families using scholarships (although some may!).



There is no existing way to track what this mix looks like among providers accepting scholarship.



Instead, any measure of “CCDF slots” (so far) is the number of licensed slots among providers who accept scholarship.



Regarding the number of scholarship-using children enrolled at each site, we do not have this information on hand.



However, it **DOES** exist in the form of providers' CCDF billings!

How many children are eligible for the state's expanded child care scholarship program?

Using Census Bureau data, the Carsey School estimates the eligible count as:

about 55,000 children under age 13

This estimate cannot account for all eligibility criteria, including certain disabilities, income types, or activities in the family. However, it's a good estimate; a forthcoming primer in the Carsey School's [*Granite Guide to Early Childhood series*](#) will include more details.

What wage data are available on the early childhood workforce in NH?

“CHILD CARE WORKER” WAGES IN NEW HAMPSHIRE, VERMONT, MASSACHUSETTS & MAINE

2023 WAGE RANGES FOR “CHILD CARE WORKERS” IN SELECT NEW ENGLAND STATES

*Total Number of Employees and Hourly Wage by Percentile for Child Care Professionals
Categorized as “Child Care Workers” by the U.S. Bureau of Labor Statistics*

State	Total Employed	10th	25th	Median	75th	90th
NH	2,630	\$10.62	\$12.99	\$15.62	\$17.76	\$20.66
ME	4,340	\$14.19	\$14.63	\$16.35	\$17.41	\$18.81
MA	13,030	\$16.10	\$17.53	\$18.72	\$21.30	\$23.03
VT	820	\$14.40	\$15.45	\$17.31	\$18.74	\$23.50

Source: U.S. Bureau of Labor Statistics State Occupational Employment and Wage Estimates (Updated May 2023)

“PRESCHOOL TEACHER” WAGES IN NEW HAMPSHIRE, VERMONT, MASSACHUSETTS & MAINE

2023 WAGE RANGES FOR “PRESCHOOL TEACHERS” IN SELECT NEW ENGLAND STATES

*Total Number of Employees and Hourly Wage by Percentile for Child Care Professionals
Categorized as “Preschool Teachers, Except Special Education” by the U.S. Bureau of Labor Statistics*

State	Total Employed	10th	25th	Median	75th	90th
NH	2,800	\$14.81	\$16.51	\$18.10	\$21.29	\$23.67
ME	1,230	\$15.31	\$17.49	\$20.57	\$22.95	\$26.02
MA	15,320	\$17.54	\$18.10	\$21.35	\$23.02	\$28.74
VT	1,550	\$15.47	\$17.77	\$18.54	\$22.59	\$29.25

Source: U.S. Bureau of Labor Statistics State Occupational Employment and Wage Estimates (Updated May 2023)

“EDUCATION & CHILDCARE ADMINISTRATORS” WAGES IN NEW HAMPSHIRE, VERMONT, MASSACHUSETTS & MAINE

2023 WAGE RANGES FOR “EDUCATION AND CHILD CARE ADMINISTRATORS” IN SELECT NEW ENGLAND STATES

*Total Number of Employees and Hourly Wage by Percentail for Child Care Professionals
Categorized as “Education and Child Care Administrators, Preschool and Daycare by the U.S. Bureau of Labor Statistics*

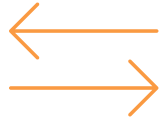
State	Total Employed	10th	25th	Median	75th	90th
NH	350	\$19.40	\$22.93	\$28.95	\$36.39	\$43.63
ME	230	\$20.88	\$22.67	\$23.84	\$30.84	\$41.40
MA	2,380	\$23.68	\$28.60	\$29.37	\$36.16	\$46.33
VT	320	\$20.82	\$23.40	\$24.48	\$32.78	\$42.56

Source: U.S. Bureau of Labor Statistics State Occupational Employment and Wage Estimates (Updated May 2023)

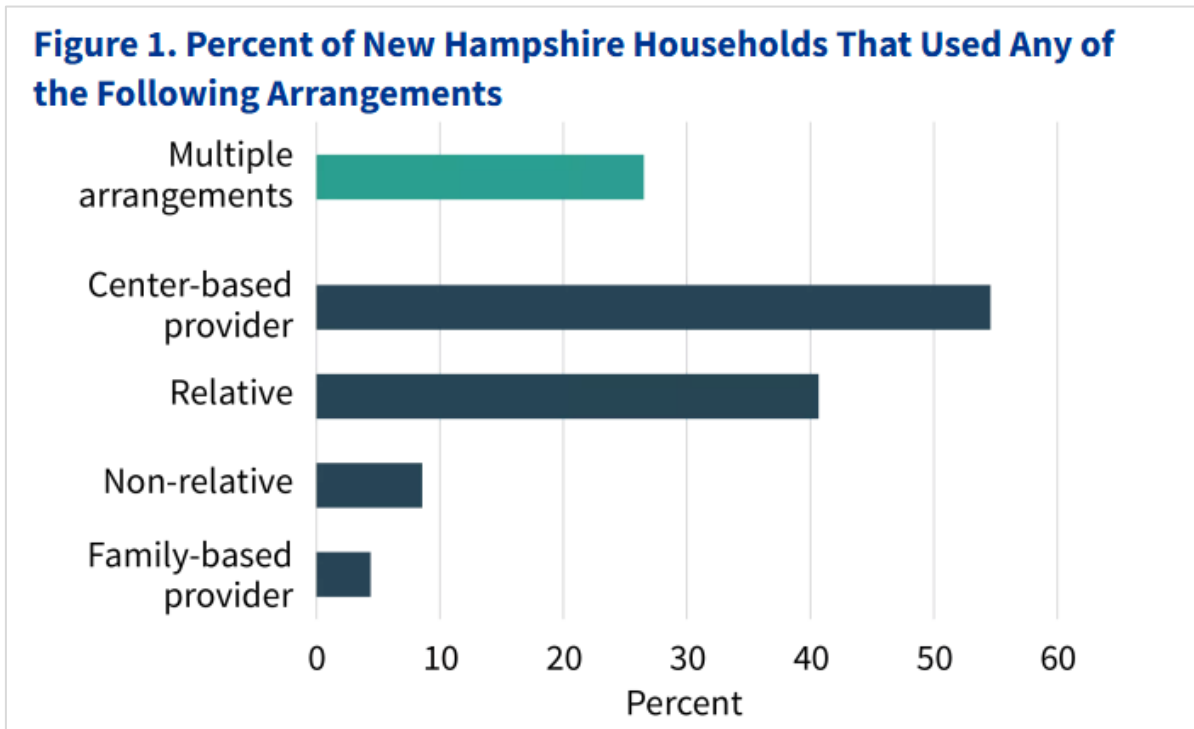
What do we know about parental preference and choice? How is this reflected in the data?



We do not have data on what families *want*.



We have pretty good data on what arrangements families *use*.

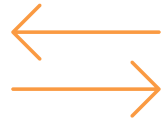




However, what families **use** and what families **want** are not necessarily the same.

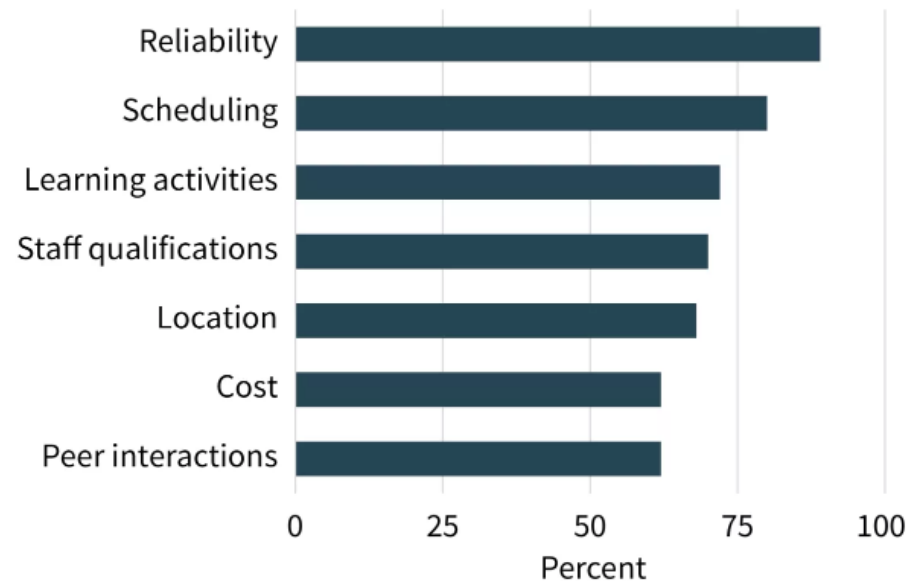


For instance, among respondents to the 2022 PDG family needs assessment, **80%** of parents using care rated their arrangement as **less than ideal**.



Among parents in the Northeast more broadly, parents rate many factors as “very important” to their child care decisions.

Figure 2. Percent of Parents Rating Each Factor As “Very Important” to Their Child Care Decision, Among Parents in the Northeast with Children Under Age Five



What do we know about...

Head Start enrollment among eligible children?

- Head Start eligibility is more complex than income alone. However, **at least 5,000** NH children live in poverty and would be eligible.
- In 2024, NH (Early) Head Start programs had **1,498 funded slots** and served **1,259 children**.

Child care deserts

- This term can be defined in different ways.
- However, one of the best and most recent NH projects is [this 2022 piece](#), done as part of the PDG.

Full-time versus part-time slots?

- NH DHHS can distinguish between CCDF billings for full- and part-time slots, but licensing data are not separated this way.

What do we know about...

Access among children with disabilities?

- Not much. We do not have robust local data about the prevalence of children with disabilities.
- However, **144 preschool programs** in NH public schools offer programming for children with IEPs.
- Federal reporting shows that **2,402 children** ages 3 – 5 received IDEA Part B-funded services in 2023
 - **43%** were served in “regular early childhood programs.”

Pre-k enrollment?

- As of early 2024, **about 5,000 children** were enrolled in 144 preschool programs in NH public schools.
- This is **about 20%** of NH 3- and 4-year-olds.
- *The Carsey School and PDG team are collecting these data again in early 2025!*

What do we know about reasons for low scholarship program participation?

From the 2022 PDG Needs Assessment:

Re: **Awareness**

“More than half [of respondents] had never heard of child care scholarships...Findings from the two prior PDG needs assessments are remarkably similar—although not directly comparable—each also finding that...[only] between half and two-thirds were familiar with child care scholarships.”

Re: **Eligibility**

“Among those who did not use child care scholarships, the most frequently selected reason was that the respondent did not think they were eligible”

Re: **Administrative barriers**

“Reasons having to do with program enrollment barriers...were selected by fewer than one-in-ten nonparticipants.”

ADDITIONAL RESOURCES

- »» NH ECE Research Consortium – www.nhece.org
- »» *Granite Guide to Early Childhood*: A new series of publications summarizing evidence across key areas of New Hampshire's early care and education (ECE) sector.
 - »» Primer 1 (“Demand”): *What Do New Hampshire Families Want for Child Care?*
 - »» Primer 2 (“Supply”): *Fewer Providers, Longer Distances: New Hampshire’s Child Care Landscape?*
 - »» Primer 3 (“Workforce”): *New Hampshire’s Well Educated, Underpaid Child Care Workforce*
 - »» Primer 4 (“Cost”): *High Child Care Costs Strain NH Family Budgets*
- »» Research brief: *Preschool Availability in New Hampshire Public Schools*

ADDITIONAL RESOURCES

- Issue Brief: The State of Child Care in New Hampshire: End of One-Time Federal Investments May Reduce Industry Stability – February 2, 2024 <https://nhfpi.org/resource/the-state-of-child-care-in-new-hampshire-end-of-one-time-federal-investments-may-reduce-industry-stability/>
- Blog: Child Care Scholarship Usage Increased Over 21 Percent in First Half of 2024 – August 26, 2024 <https://nhfpi.org/blog/child-care-scholarship-usage-increased-over-21-percent-in-first-half-of-2024/>
- Fact Sheet: High Prices and Low Availability of Child Care in New Hampshire: Challenges Continue in 2024 – June 4, 2024 <https://nhfpi.org/resource/high-prices-and-low-availability-of-child-care-in-new-hampshire-challenges-continue-in-2024/>
- Resource Pages: Economy, Education <https://nhfpi.org/topic/economy/>
<https://nhfpi.org/topic/education/>



ADDRESS:
Huddleston Hall, 73 Main Street
Durham, NH 03824

PHONE: 603.862.3215

WEBSITE: www.nhece.org

EMAIL: Jessica.Carson@unh.edu



ADDRESS:
100 North Main Street, Suite 400
Concord, NH 03301

PHONE: 603.856.8337

WEBSITE: www.nhfpi.org

EMAIL: info@nhfpi.org

TWITTER: @NHFPI

FACEBOOK:
NewHampshireFiscalPolicyInstitute

Notes

Note 1. Maps of providers participating in NH CCSP

CCSP participation among providers was shared in May 2024. However, to ensure we are mapping the most recent licensing data, we link the May CCSP details to the October licensing data using providers' license numbers. For the 4% of October license numbers not appearing in May, information was manually searched and populated from NH Connections in November 2024. One provider appearing as a licensed school age provider in the October data did not appear as a provider in May, nor on NH Connections in November, so is omitted here.

Note 2. Estimating eligibility for the NH CCSP

A detailed memo describing the restrictions and assumptions for estimating eligibility was shared with the former Bureau Chief in August 2024 and is available upon request (jessica.carson@unh.edu).