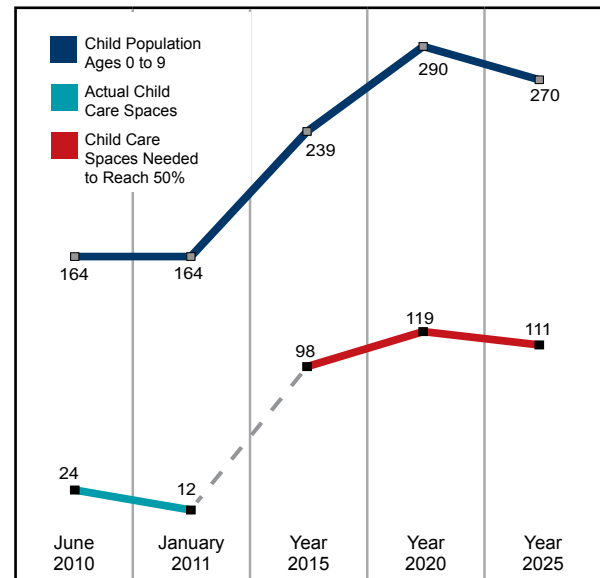


Meeting Tioga's Future Child Care Demand

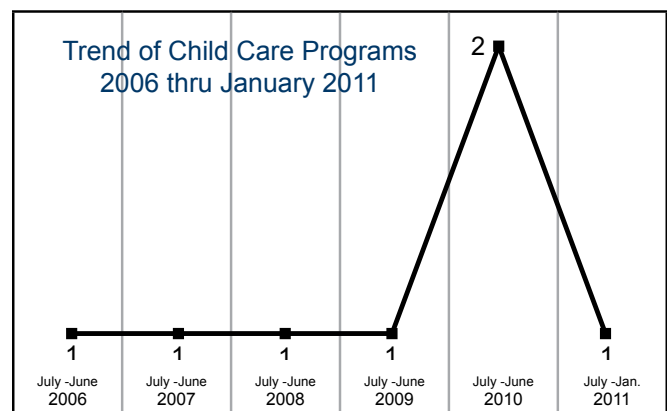
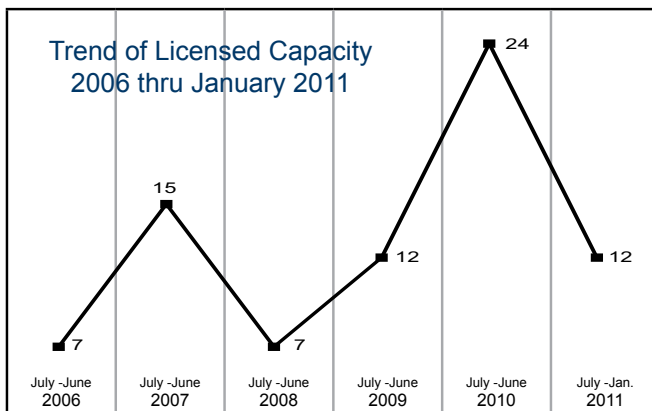
The 2011 Commerce Department housing study in oil country forecasts Tioga's child population (birth to 9 years) will grow 46% by 2015, 77% by 2020, and 85% by 2025. This growth will put a significant strain on Tioga's already fragile child care industry and, if not addressed, will limit business' ability to recruit and retain parent employees.

Child care industry standards suggest a community's child care supply meet at least 50% of demand. Tioga's 2010 child care supply met only 9% of the child care demand falling short 56 spaces. Building Tioga's child care supply to meet future demands will be extremely challenging.

A review of licensing trends over the past five years indicates no additions of licensed programs in Tioga. In fact, within the last six months, Tioga lost one of two child care businesses bringing the licensed capacity from 24 to 12.



* In the last six months, The Growing Child Care Initiative recruited 4 new programs adding 48 new spaces.



Building and upward growth trend of child care will require on-going provider recruitment and retention efforts.

To meet the 2015 child care demand, Tioga must add 86 spaces beyond the current 12 by recruiting 14 small in-home child care businesses (each caring for 7 children) or 5 group providers (each caring for 18 children).

Tioga's Projected Licensed Childcare Supply and Demand

| | 2010 | 2015 | 2020 | 2025 |
|---|------|------|------|------|
| Children living with employed mothers | 135 | 196 | 238 | 221 |
| Child care spaces needed to serve 50% of demand | 68 | 98 | 119 | 111 |
| Spaces currently licensed (projection if no growth) | 12 | 12 | 12 | 12 |
| Spaces needed to reach 50% of demand | 56 | 86 | 107 | 99 |

Data Sources:

- 2010 North Dakota Department of Commerce Housing Study
- North Dakota CCR&R NACCRRAware Database
- 2010 U.S. Census

