Great Falls Childcare Feasibility Study:

2026 Update

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Great Falls Development Alliance
Montana Economic Development CDFI

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CHILDCARE STUDY UPDATE

PURPOSE

To assess the scale and characteristics of unmet childcare demand in Great Falls.

FOCUS

To understand the scale and implications of unmet childcare demand in Great Falls.

DISCUSSION

What actions can the GFDA and its partners take to reduce the childcare gap at a scale that makes a measurable impact?

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HOW WE GOT HERE - METHODOLOGY

Demographic and Economic Analysis

Survey Research

- 116 Community Survey Respondents

Stakeholder Engagement

- Direct Outreach to Licensed Providers
- 15+ Stakeholder Interviews

Market Supply & Demand Analysis

- Builds on 2021 Study for Trend Comparison

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CAMOIN'S PRINCIPLES FOR EFFECTIVE DATA USAGE

The world is complex and changes rapidly and with this comes uncertainty. Data should…

Inform, Not Predict

Inform, encourage thinking, ask and share engaging questions, build capacity, and collaborate.

Explore and Explain

Explore emerging issues, challenges, opportunities, and possibilities, and explain, understand, measure, and evaluate.

Build Trust

Document sources, use multiple sources, and understand and share assumptions and limitations.

Lead Action

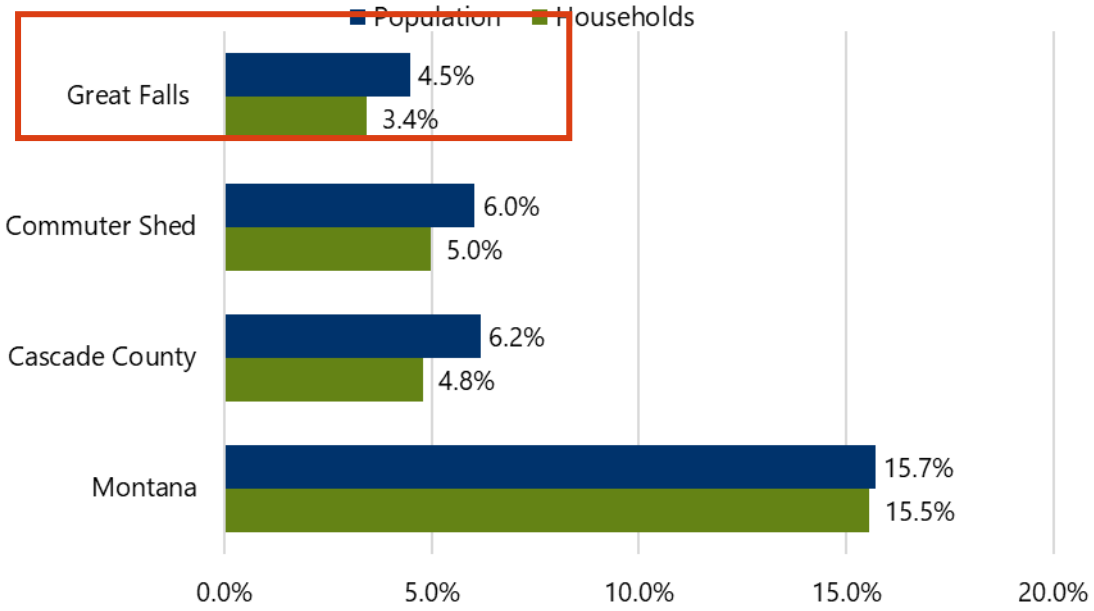
Avoid paralysis by analysis through continuous cycles of acting, learning, adapting, and transforming.

Key Findings

CITY OF GREAT FALLS TODAY:
STABLE, SLOW GROWTH COMMUNITY WITH AFFORDABILITY PRESSURES

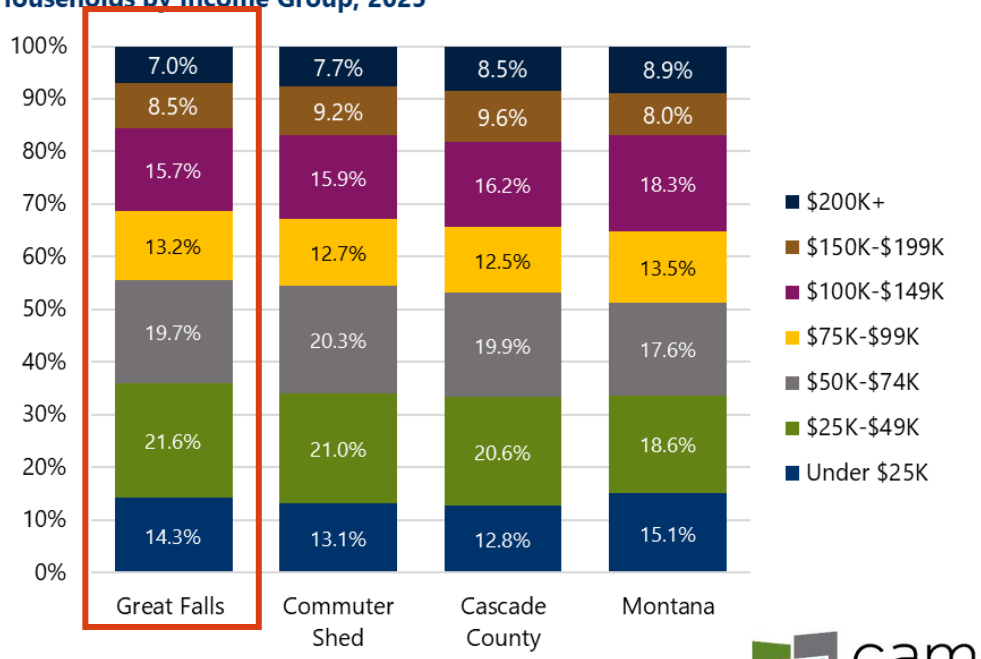
- Population projected to reach **~63,000 by 2030**; growth well **below** state average
- Median household income **($66,506)** below state median **($72,702)**
- 35%+ of households earn under $50,000 — affordability is not optional

Change in Population and Households, 2010-2025



Source: Decennial Census; Esri

Households by Income Group, 2025



Source: Esri

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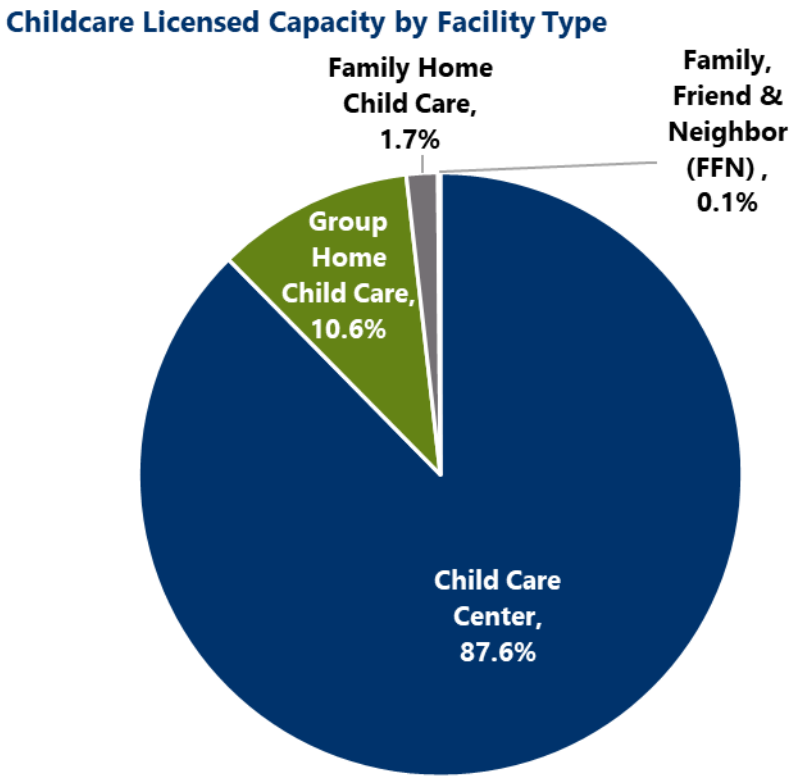
THE CHILDCARE SYSTEM TODAY

73 Licensed Facilities, 3,095 Slots – But Not All Usable

- ~5% of slots estimated non-operational; ~15% operating but unfilled
- **Functional Capacity: ~2,476 childcare slots** – Staffing, not space, is the binding constraint.



Source: Montana Early Childhood Service Bureau

Licensed Capacity > Functional Capacity

WHERE DEMAND IS CONCENTRATED

500-860 Children Estimated Without Adequate Care

- **Infant care** (0–12 months): highest unmet need, hardest and most expensive to staff
- **Preschool** (3–5): open slots exist, but affordability and scheduling drive families away
- **Demand increased ~80–120 children since 2021**

Summary of Great Falls Childcare Center Demand

Age Cohort	Low	Mid	High
Newborns (up to 12 months)	120	162	205
Toddlers (13 to 23 months)	109	147	186
Young Preschooler (24 to 35 months)	105	142	179
Preschool (3 to 5 years)	168	228	288
Total	**502**	**680**	**858**

Source: Camoin Associates

THE CORE PROBLEM – ALIGNMENT, NOT JUST SUPPLY

It's Not A Shortage Of Facilities. It's A Mismatch.

- Families want affordable, flexible, infant-focused care in smaller settings
- Providers operate responsibly within narrow financial margins — they cannot simply expand
- Adding licensed slots alone will not close the gap

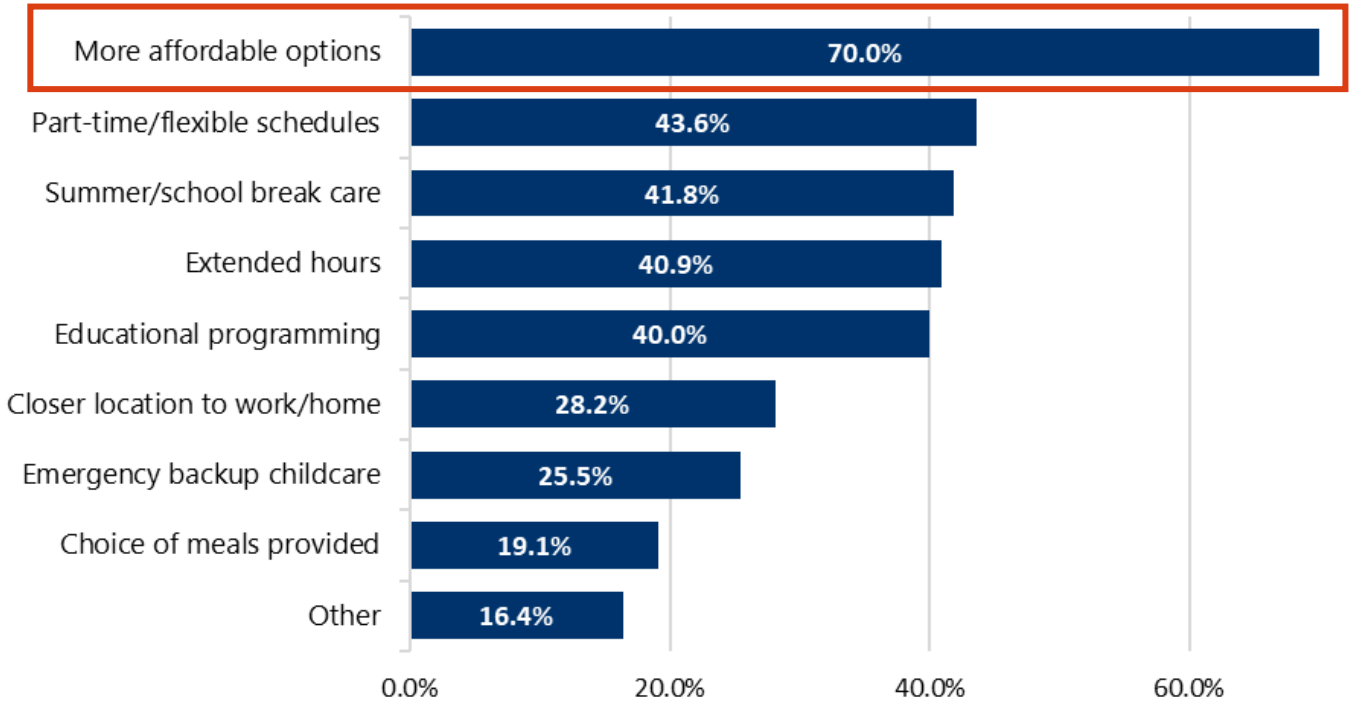
Is Childcare in Great Falls a Supply Issue or an Alignment Issue?

Age Group	Demand Pressure	Capacity Reality	What This Means
Newborns (0–12 months)	High	Constrained	High staffing intensity and operating costs limit viable supply
Toddlers (13–23 months)	Moderate–High	Partially constrained	Staffing and cost pressures restrict expansion
Young Preschool (24–35 months)	Moderate	Capacity available	Enrollment risk limits utilization
Preschool (3–5 years)	Moderate	Open slots reported	Affordability and competition
Overall Market	**Moderate**	**Capacity exists**	**Mismatch between care offered and care needed**

WHAT FAMILIES AND EMPLOYERS ARE TELLING US

Community Voices Confirm Structural Gaps

Which of the following would encourage you to use a new childcare facility in Great Falls? (Select all that apply) (n=110)



Source: Great Falls Childcare Demand Survey, Camoin Associates

- 21% of survey respondents are military-affiliated; **80% say on-base care does not meet their needs**
- Employers see childcare as a workforce issue; prefer shared/partnership models
- **Families are assembling patchwork care** — a signal of system fragility, not preference

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Recommendations & Strategies

RECOMMENDED STRATEGIES

Six Pillars to Strengthen the Childcare System in Great Falls

1. **Prioritize, Strengthen, And Stabilize Workforce** – Wages, Retention Incentives, Training Pipelines

2. **Reduce Provider Risk to Activate and Sustain Capacity** – Start Up Grants, Enrollment Guarantees, Tiered Reimbursement

3. **Expand Flexible and Nontraditional Care Options Through Partnerships** – Extended Hours, Nontraditional Schedule Pilots

4. **Improve Affordability While Supporting Provider Sustainability** – Layered Funding (Employer + Philanthropic + Public)

5. **Leverage Employer Participation Through Scalable, Shared Models** – Reserved Slots, Co-Pay Models, Tiered Entry Points

6. **Address Military-Affiliated Childcare Needs Through Targeted Provider Support** – Shared Staffing Pools, Navigation Tools, Data Tracking

Priority: *Activate Existing Capacity Before Building New.*

FROM STUDY TO ACTION
Where to Start

Priority	Up Next	Long-Term
Launch shared staffing pool/ sub pool	Develop employer partnership model	Pursue dedicated financing mechanism
Expand provider navigation & referrals	Pilot extended-hours care	Build childcare workforce pipeline
Use this study as baseline for tracking	Targeted support for home-based providers	Align with State/Federal programs

Childcare in Great Falls is structurally constrained but responsive. The strategies that will make the biggest difference are those that reduce operating risk, stabilize the workforce, and better align care models with how families need to use them.

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Thank You!!

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