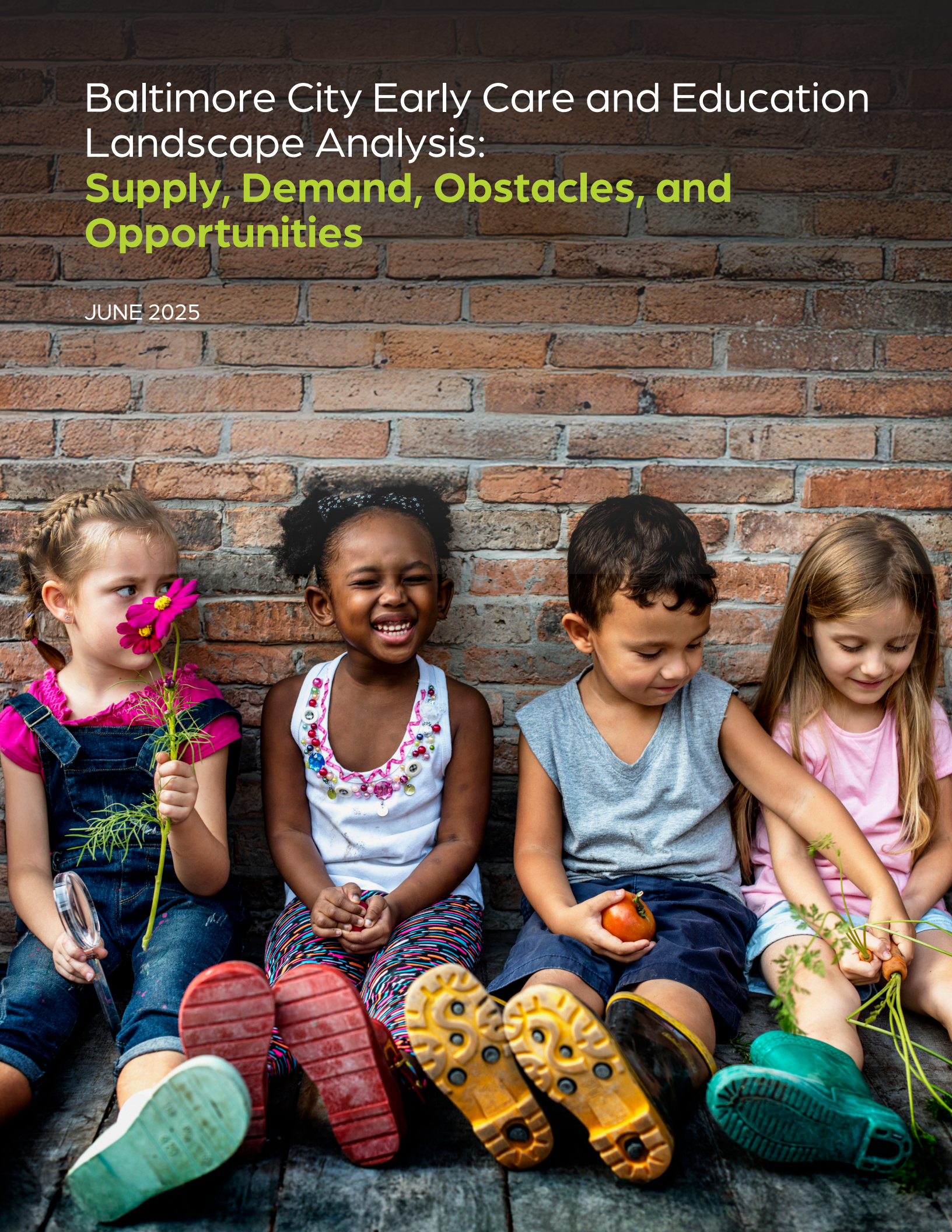
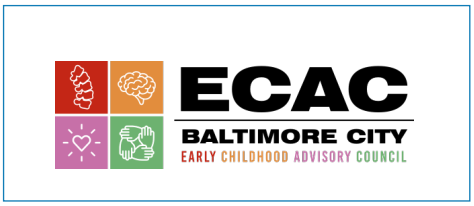
Baltimore City Early Care and Education Landscape Analysis: **Supply, Demand, Obstacles, and Opportunities**

JUNE 2025

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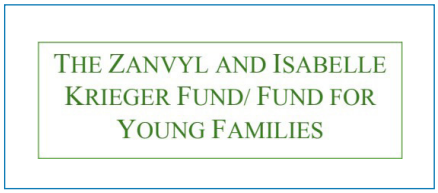
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About this Report

The Baltimore City Early Care and Education Landscape Analysis was commissioned by the Baltimore City Early Childhood Advisory Council (ECAC) and funded by a grant from the Maryland State Department of Education through the Family League of Baltimore City. Additional funding from members of the Prenatal to Five Impact Collaborative at the Maryland Philanthropy Network supported editing and design. The Fund for Educational Excellence and the Family League of Baltimore provided project coordination, leadership, and guidance throughout.

Partners in producing this analysis are:

- The Baltimore Neighborhood Indicators Alliance at the Jacob France Institute at the University of Baltimore, which provided data analysis and geo-mapping.
- The Early Childhood Data Collaborative of the Baltimore Educational Research Consortium at Johns Hopkins University, which provided data on births and school readiness.
- The Maryland Family Network, which contributed information on the location, capacity, cost, and EXCELS rating (Maryland's quality rating system) of early care and education programs in Baltimore via the LOCATE child care data set.
- Principal investigators from Strategic Thinking for Social Change and the School of Education and Human Development at the University of Virginia who directed the project, completed additional analyses, and prepared drafts of this report and other presentations of findings for review and discussion.
- Waldron Strategies, which provided editing and graphic design services.

This is the first in a series of reports commissioned by project funders. It will be followed by an analysis of young children's early childhood experiences in Baltimore from birth to age five and surveys and focus groups to gather parent and caregiver perspectives on early childhood education and care availability and choice.

Project partners gratefully acknowledge all of the public and private funders and coordinating partners who have inspired and supported this and the related work to come:

- Abell Foundation
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- Sherman Family Foundation
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- United Way of Central Maryland
- Wright Family Fund

We are also grateful to the many members of the Early Childhood Advisory Council who reviewed early drafts of this report and provided essential corrections and context.

The broad and deep support for this research and analysis is evidence of a growing commitment to the city's youngest children and their families, which only bodes well for all of us.

While support is broad and deep, any errors and misrepresentations are, of course, attributable to the authors alone.

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EXECUTIVE SUMMARY

The 2024–2025 Baltimore City Early Care and Education Landscape Analysis seeks to answer critical questions about the number, residential location, and conditions of the city's children from birth to age five; document the network of early care and education programs available to them; assess how these programs match with the needs of the city's children and families; and identify obstacles and opportunities to better meeting these needs so that more children and families in Baltimore can thrive.

The analysis is motivated by:

- The accumulated research evidence on the importance of high-quality early care and education to young children's developing brains, their social emotional development, future success in school, and improved outcomes over the life course.
- The role early care and education plays in allowing parents to pursue family-sustaining employment and their own education and career goals.
- A growing consensus that ensuring access to high-quality early care and education is an important economic mobility strategy for communities to undertake, especially in cities like Baltimore where past practices and policies have created vast disparities in wealth and access to opportunity.

Key findings include:

- Births in Baltimore have declined by over 16% since 2015, driven by decreases in births to Black mothers. Alongside this overall decrease, there are a small but growing number of Hispanic families.
- The percentage of children, families, and individuals in poverty has also decreased. Yet, child poverty remains highly concentrated by race and place. Black and Brown children are much more likely than their White peers to live in poverty. Sixteen Baltimore City communities experience child poverty rates of 35% or higher; six have child poverty rates of greater than 50%.
- Reflecting disparities in opportunity, school readiness – as measured by the state's pre-existing Kindergarten Readiness Assessment – largely mirrors the race and ethnicity of a child's family.
- That is some, but not all, of the story. Kindergarten readiness also appears highly related to prior early care and education settings. Children whose parents report they attended a child care center or who were in City Schools' Pre-K in the year before kindergarten are much more likely to be assessed as ready than their peers who were in home or informal care.
- Working families cite addressing the affordability of child care as a most pressing need.
- Despite early care and education's significance to school readiness and to meeting the needs of working families, there are substantial gaps in availability:
    - There are available early care and education opportunities for an estimated 50% of the city's children under five, but only 20% of infants.
    - There are few regulated child care programs in areas of the city where growing numbers of Hispanic families live.
    - There are clear gaps in other communities where early care and education is available to far fewer than 50% of children.
- Evidencing what many have called a "market failure" or "broken system," early care and education is:
    - Unaffordable for families who are at or below the median annual income and who pay more than 30% of their income for regulated care. It is even more unaffordable for families of color whose annual earnings are lower than the city average.

    - Of uncertain quality overall.
    - Staffed and led by dedicated employees with low wages who face financial pressures of their own.

- Post-pandemic, there are declining numbers of providers, reduced availability, and rising costs.
- With respect to the implementation of the Blueprint for Maryland's Future, because of City Schools' pre-existing commitment to Pre-K, Baltimore has the *capacity* to meet enrollment goals for four-year-olds from low-income families, but not three-year-olds. While Baltimore is near capacity for low-income four-year-olds, we estimate current Pre-K availability for only 65% of *all* four-year-olds. Few, if any, new seats have been added in public schools or in community-based and private providers over the last two years. With the intent of creating a "mixed delivery" system, the state's goal remains a 50/50 split between public schools and community-based and private providers. Though it is outpacing almost every other jurisdiction in the state, in Baltimore community-based and private partners currently provide 8% of all Pre-K seats. Enrollment is below capacity.
- Baltimore City Head Start and Early Head Start programs serve children from families and communities who experience poverty. Currently, there are available spots for 55% of eligible three- and four-year-olds from families with incomes below the Federal Poverty Level, but only 5% of eligible children under age three. Head Start programs in Baltimore are experiencing challenges related to attracting and retaining adequate staff that in turn affect their ability to operate classrooms and enroll children. A strengthened partnership with City Schools alongside Pre-K expansion may provide an opportunity to reach more children. The initial version of the proposed federal 2026 budget zeroed out funding for all Head Start and Early Head Start programs nationwide – a move that would have affected over 2,300 children and their families in the city. After public outcry, program funding in the proposed budget has since been restored though administrative funds have been cut and considerable uncertainty remains.

Lack of access to and the high costs of regulated early care and education hamper the workforce participation of families with young children and affect school readiness. Federal policy and priority changes are creating instability. There are bright spots, however:

- Maryland has made and maintained significant investments in the Child Care Scholarship Program. While growth is now capped due to state budget pressures, the number of families and children who receive direct financial support for child care in Baltimore City has doubled since 2022; and
- Though progress has been slow and real challenges to the implementation of a mixed delivery system have emerged, Maryland remains committed to scaling up public Pre-K for all low-income three- and four-year-olds.

Public commitments to the Child Care Scholarship and Pre-K expansion in Maryland could provide the initial building blocks for a universal system of early care and education for all children birth to age five, yet we are far from such a system now, particularly when it comes to children under age three. This recent progress is threatened by continuing projected state budget shortfalls and further possible cuts by the current federal administration.

As real and intense as these current pressures are, now is the time to:

- Fight to sustain existing federal, state, and local funding commitments.
- Maximize enrollment in publicly funded programs by better understanding the reasons behind the gap between enrollment and available seats.
- Design a targeted outreach campaign to children not currently enrolled in formal early care and education as four-year-olds, English Language Learners, and children with special needs.

- Exert leadership, energy, and urgency to better meet the needs of the city's youngest children and their families.
- Invest accordingly. Public funds may be tight in the city and state and uncertain from the federal government, but Baltimore and Maryland are not without resources. Public investments can and should be matched by philanthropy and business as evidence of a deeper commitment to working parents, to children's school readiness, and to putting more Baltimore City families on the path to prosperity.

Stakeholders and policy makers should also work together to:

- Address questions about the effectiveness and reach of the Maryland EXCELS quality rating and improvement system and – in as much as it remains a standard for the allocation of public resources in Maryland – implement effective approaches to enlist more providers and support them in moving up in the ratings.
- Renew a commitment to mixed delivery and to expanding Pre-K for all low-income three-year-olds and all four-year-olds and accelerate progress towards this goal.
- Improve pay and advancement opportunities such that all early care and education professionals are well compensated, well supported, and sufficiently appreciated no matter the setting in which they carry out their important work.

Finally, a greater commitment to transparent and comprehensive data collection on early care and education and regular public reporting of these data is a basic requirement for future action and accountability.

> *"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*

INTRODUCTION

The 2024-2025 Baltimore City Early Care and Education Landscape Analysis seeks to answer critical questions about the number, residential location, and conditions of the city's children from birth to age five; document the network of early care and education programs currently available; assess how these programs match with the needs of the city's children and families; and identify existing obstacles and opportunities to better meeting these needs so that all children and families in Baltimore can thrive.

The analysis is motivated by:

- Research evidence about how high-quality early care and education affects young children's developing brains, their social emotional development, future success in school, and improves outcomes over the life course.
- The role early care and education plays in allowing parents to pursue family-sustaining employment and their own education and career goals.
- A growing consensus that ensuring access to high-quality early care and education – largely because of improved educational outcomes for children and supporting the workforce participation of parents – is an important economic mobility strategy for communities to undertake. This is especially true in cities like Baltimore where past practices and policies have created vast disparities in wealth and access to opportunity.[1]

This report is an update of an earlier version produced in 2019. The 2024-2025 report is particularly timely given:

- Increased attention to the role and importance of early care and education brought on by the COVID-19 pandemic.
- The intended expansion of Pre-K programs at no cost to all three- and four-year-olds from families whose earnings place them at or below 300% of the Federal Poverty Level (FPL) and on a sliding scale for children from families up to 600% of FPL made possible by the Blueprint for Maryland's Future, Maryland's signature effort to address equity and improve outcomes for all public school students.
- Significant investments in the Maryland Child Care Scholarship Program, the state's program of child care subsidies for working families.
- Growing civic and philanthropic interest in making the most of this moment to begin to build out an integrated system of early care and education that supports *all* young children in Baltimore from birth through kindergarten.

This report addresses the following questions:

- How many children under the age of five live in Baltimore? Where do they live?
- What can be said about the current conditions of the city's youngest children? How do these conditions vary by geography and demographics?
- What is the formal network of early care and education programs available to young children and their families?
- How accessible and affordable are these opportunities? How do available opportunities match with demand?

[1] See, for example: High-quality early care and education: The gift that lasts a lifetime, The Brookings Institution, 2021; The Economics of Early Childhood Investments, Executive Office of the President of the United States, 2014; and The Upward Mobility Framework, The Urban Institute, accessed at https://upward-mobility.urban.org/framework.

- How has the network of early care and education programs changed since the pandemic?
- With particular attention to the expansion of Pre-K under the Blueprint for Maryland's Future:
    - How many children are eligible for Pre-K under the Blueprint?
    - Where do they live?
    - Where are existing Pre-K programs?
    - Where are gaps and opportunities?
- What can be said about the scope and reach of the city's Head Start and Early Head Start programs?
- What can we say about obstacles and opportunities moving forward?

To complete this analysis, project partners have drawn on the U.S. Census American Community Survey and administrative data from the Baltimore City and Maryland Health Departments, Baltimore City Public Schools, the Baltimore City Head Start Collaborative, the Maryland State Department of Education, and the Maryland LOCATE Child Care data set managed by the Maryland Family Network, along with select other sources as noted. While every attempt has been made to include the most current information, in some instances the data lag the present by several years. Other limitations to data availability, specificity, and the strength of estimates are identified throughout.

I. YOUNG CHILDREN IN BALTIMORE

Because they are more contemporaneous than census data and are based on actual counts instead of estimates, we use births to Baltimore City mothers to delineate and describe the city's population of young children. There are several limitations to these data. Record-keeping and data sharing has slowed since the pandemic, and birth records don't account for the movement in and out of the city by young children and their families. However, based on available data:

- Over the seven-year period from 2015 to 2021,[2] an average of 7,880 children were born in Baltimore each year (Table 1).
- The annual number of births has declined by 16.5% over the period, from 8,658 babies born in 2015 to 7,231 babies born in 2021.
- The decrease in the number of births was led by a 25% percent decline in births to Black mothers.
- Even with this decrease, births to Black mothers still make up the largest share of births in the city, at 58.5% of all births. White mothers accounted for 26% of all births, and Hispanic mothers accounted for 11%, with that rate increasing over time. Births to all others account for an additional 4%.

Table 1. Births in Baltimore City, 2015–2021

Year	White	Black	American Indian	Asian/ Pacific Islander	Hispanic	Other/ Unknown	Total
2015	2,247	5,281	13	292	806	19	8,658
2016	2,205	5,152	16	259	826	68	8,526
2017	2,083	4,743	14	246	797	53	7,936
2018	2,023	4,469	9	251	872	56	7,680
2019	2,036	4,476	13	220	945	30	7,720
2020	1,943	4,203	18	252	968	28	7,412
2021	1,876	3,937	13	153	1,003	249	7,231
Total	14,413	32,261	96	1,673	6,217	503	55,163
Average	2,059	4,609	14	239	888	72	7,880
Change 2015–2021	-371	-1344	0	-139	197	230	-1427
% Change 2015–2021	-16.5%	-25.4%	0.0%	-47.6%*	24.4%	1210.5%*	-16.5%
% All Births	26.1%	58.5%	0.2%	3.0%	11.3%	0.9%	100.0%

**caution in interpretation due to small numbers*

Working from records going back to 1996, the Baltimore Education Research Consortium (BERC) has projected births – along with kindergarten and Pre-K enrollment – through 2026. A full table of these estimates is included in Appendix A. Here, we use the combination of actual birth records and the BERC projections through 2024 to come up with a current estimate of the number of children under the age of five living in the city.

[2] As of the time of this writing, birth data is available through 2021.

Table 2. Estimated Number of Children Under Five

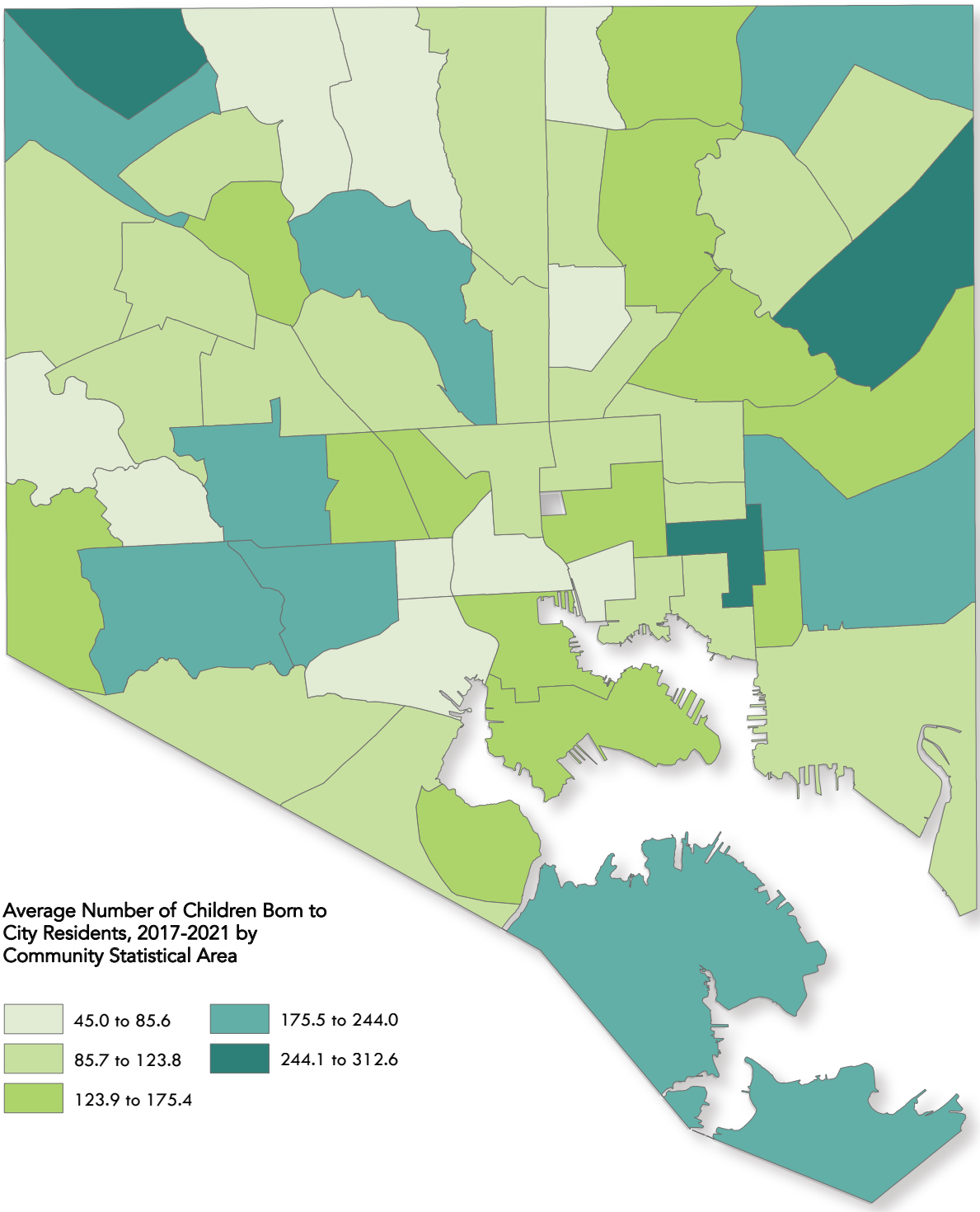
Calendar Year	Births (actual)	Births (BERC projection based on trends)	Total Under Age Five	Child's Age 2024	Age Grouping
2020	7,412			4	
2021	7,231			3	
2022		7,612		2	
2023		7,530		1	Toddlers (12–23 months)
2024		7,447		0	Infants (0–11 months)
Total/s	14,643	22,589	37,232		

With birth records and BERC's projections, we estimate that some 37,232 young people under the age of five currently live in Baltimore.

To understand the geographic location of young children, we use Community Statistical Areas (CSAs) that are aggregations of census tracts compiled by the Baltimore Neighborhood Indicators Alliance – Jacob France Institute (BNIA-JFI) to approximate neighborhoods across the city (Figure 1). The map in Figure 2 represents the annual average number of babies born in Baltimore from 2017 to 2021 by CSA.

Figure 1. Baltimore City Community Statistical Areas

Figure 2. Baltimore City Community Statistical Areas



Natural breaks method used for data classification. Analysis: Baltimore Neighborhood Indicators Alliance - Jacob France Institute.
Source: Baltimore City Health Department

Communities with relatively high numbers of births can be found in the northeast, northwest, and southeast areas of the city and in the neighborhoods east and west of downtown.

Table 3 lists the communities with the most births. Table 4 does the reverse, providing data on the communities with the fewest annual births. (Table A-2 in Appendix A contains a full listing of all CSAs and their average annual number of births.)

Table 3. Average Annual Number of Births by Community Statistical Area: 10 CSAs with Largest Number of Births

Community Statistical Area (CSA)	Average Annual Number of Births (2017–2021)
Cross–Country/Cheswolde	313
Patterson Park North & East	282
Cedonia/Frankford	276
Brooklyn/Curtis Bay/Hawkins Point	244
Hampden/Remington	222
Greektown/Bayview	218
Greater Rosemont	213
Southwest Baltimore	210
Hamilton Hills	202
Glen–Fallstaff	199

Table 4. Average Annual Number of Births by Community Statistical Area: 10 CSAs with Fewest Births

Community Statistical Area (CSA)	Average Annual Number of Births (2017–2021)
Greater Roland Park/Poplar Hill	45
Mount Washington/Coldspring	50
Harbor East/Little Italy	52
Dickeyville/Franklintown	59
Pigtown/Carroll Park	66
Poppleton/The Terraces/Hollins Market	67
Downtown/Seton Hill	73
The Waverlies	83
Edmondson Village	83
Chinquapin Park/Belvedere	86

Children and Families in Poverty

In some encouraging news for Baltimore, poverty estimates from the 2018–2022 U.S. Census American Community Survey indicate that the percentage of residents in poverty has decreased slightly since the previous estimate covering the period 2013–2017. Individuals in poverty, families in poverty, and children in poverty have all fallen by several percentage points.

Table 5. Poverty in Baltimore City

	Individuals in Poverty (%)			Families in Poverty (%)			Children in Poverty (%)		
	2013-2017	2018-2022	Percentage Point Change	2013-2017	2018-2022	Percentage Point Change	2013-2017	2018-2022	Percentage Point Change
Baltimore City	22%	20%	-2	17%	15%	-2	33%	25%	-8

Source: American Community Survey 5-Year Estimates, 2013-2017 and 2018-2022

As encouraging as these slight decreases may be, given the intense racial segregation and patterns of investment and disinvestment that have characterized Baltimore,[3] even with falling poverty rates, Black and Brown families and children remain much more likely to experience poverty than White children and families (Table 6).

Poverty is also highly concentrated (Figure 3 and Table 7). Sixteen Baltimore City communities experience child poverty rates of 35% or higher. Poppleton, Westport/Mount Winans/Lakeland, Upton/Druid Heights, Oldtown/Middle East, Sandtown-Winchester/Harlem Park, and Cherry Hill have child poverty rates of greater than 50%.

Table 6. Percent of Children in Poverty by Race and Ethnicity, 2013–2017 and 2018–2022

Race/Ethnicity	% of Children in Poverty		Percentage Point Change
	2013–2017	2018–2022	
Black	39%	30%	-9
White non-Hispanic*	9%	10%	1
Asian**	24%	27%	3
Hispanic	32%	22%	-10

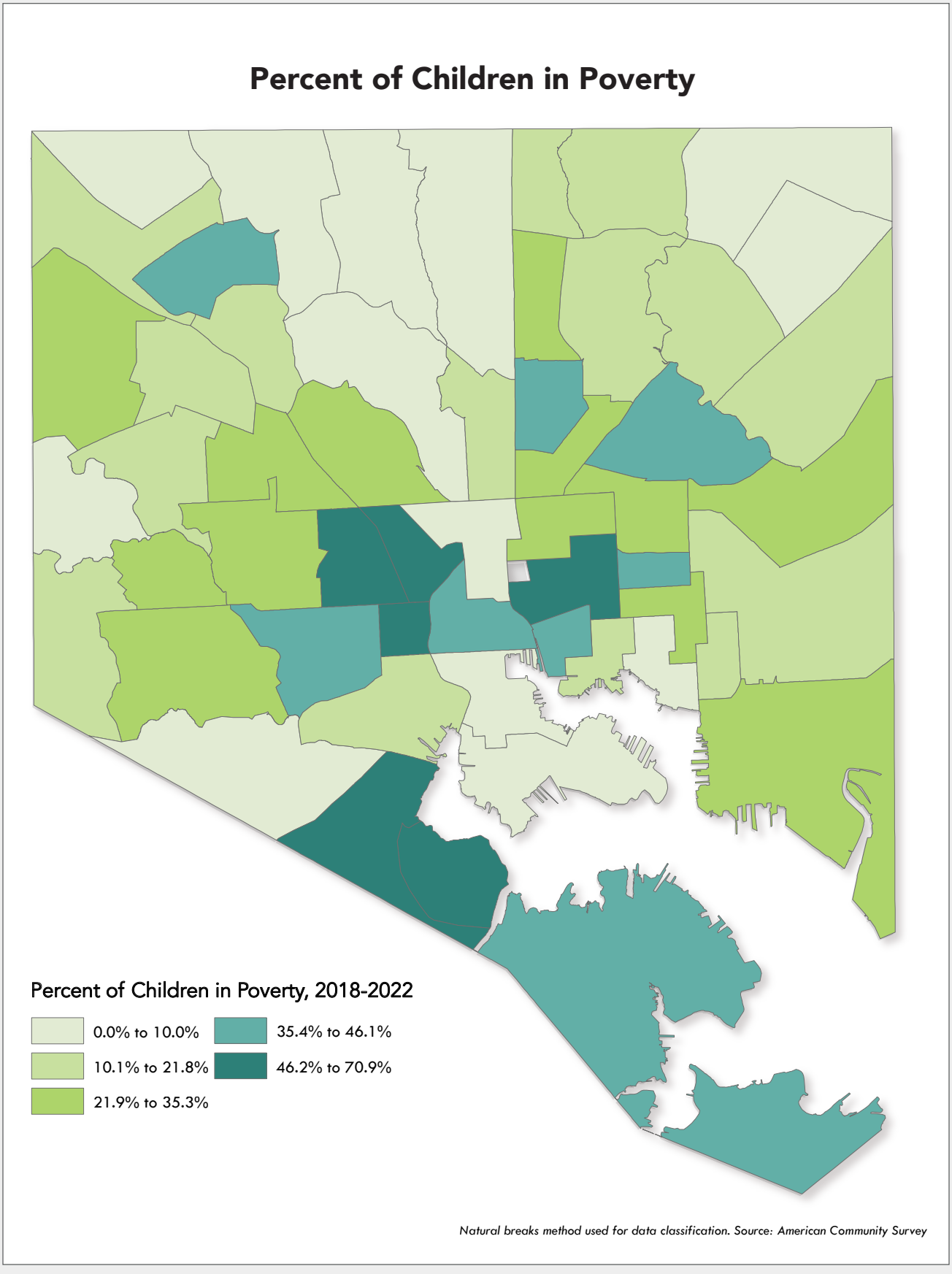
Source: American Community Survey 5-Year Estimates, 2013-2017, 2018-2022

**change within the margin of error for estimate*

***caution in interpretation of changes due to small numbers*

[3] See, for example, Brown, Lawrence T., The Black Butterfly: The Harmful Politics of Race and Space in America, Johns Hopkins University Press, 2021.

Figure 3. Percent of children under 18 in poverty, 2018-2022



Natural breaks method used for data classification. Source: American Community Survey

Table 7. CSAs where 35% or More of Children under 18 are Below the Poverty Line[4]

Community Statistical Area (2020)	Average Annual Number of Births (2017–2021)	Percent of Children Living Below the Poverty Line (2018–2022)
Poppleton/The Terraces/ Hollins Market	67	71%
Westport/Mount Winans/ Lakeland	124	59%
Upton/Druid Heights	131	57%
Oldtown/Middle East	138	55%
Sandtown-Winchester/ Harlem Park	160	54%
Cherry Hill	139	53%
Harbor East/Little Italy	52	46%
The Waverlies	83	46%
Downtown/Seton Hill	73	46%
Southwest Baltimore	210	45%
Madison/East End	116	45%
Belair-Edison	175	42%
Brooklyn/Curtis Bay/ Hawkins Point	244	42%
Pimlico/Arlington/Hilltop	113	38%
Midway/Coldstream	97	35%
Edmondson Village	83	35%

School Readiness

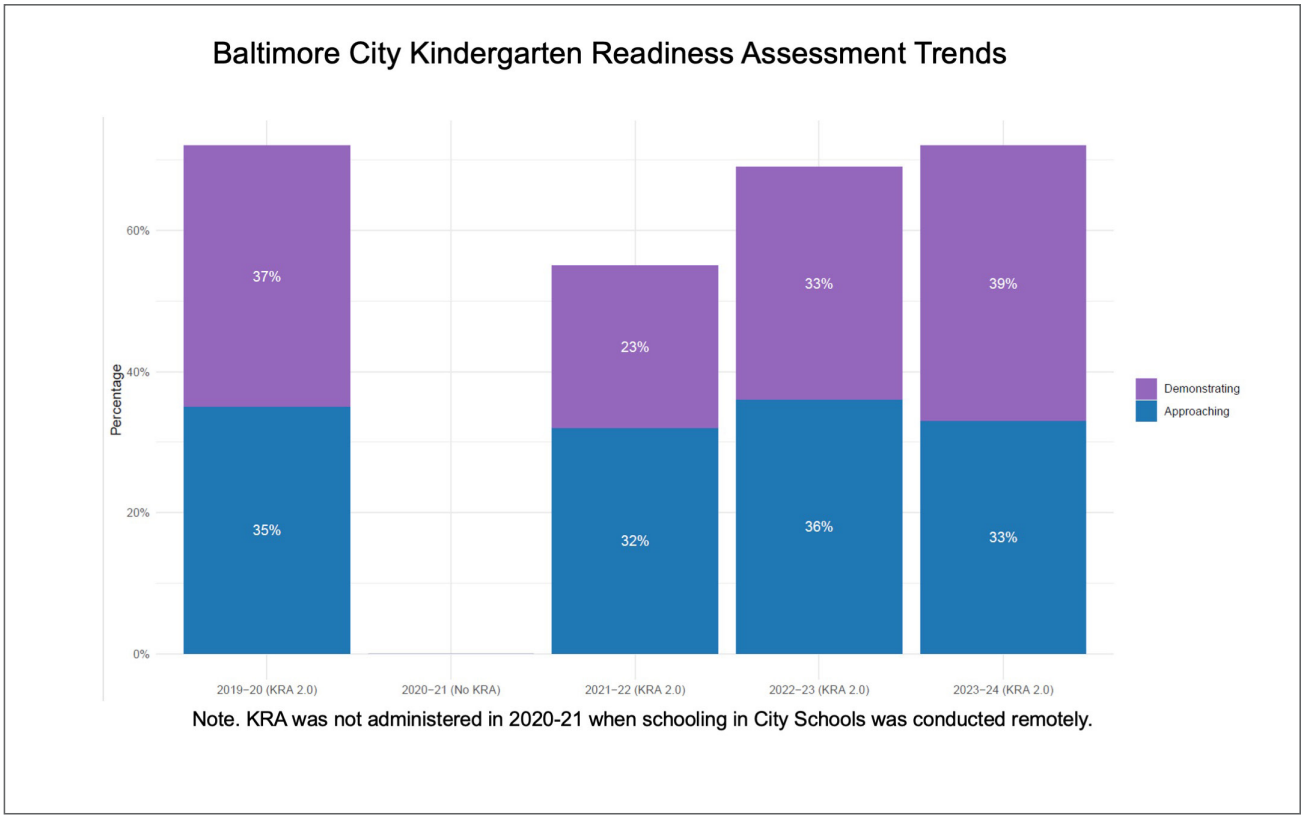
While certainly not the only goal of early childhood care and education – coverage for working parents and the health and safety of young children are also of primary concern – advancing school readiness remains of great interest to funders, policy makers, providers, and families. In Maryland, the Kindergarten Readiness Assessment (KRA) has been used since 2014 to gauge the school readiness of entering kindergarteners. Usually administered in the fall of each school year, the KRA assesses readiness across seven domains and assigns students to one of three categories – developing, approaching, or demonstrating kindergarten readiness.

[4] Please also see Table A-3 in Appendix A for a full ranking of CSAs by the percentage of children in poverty.

In February of 2024 the Maryland State Department of Education (MSDE) announced that it will be moving away from the KRA after research indicated potential bias in assessing the readiness of students from various racial, ethnic, and linguistic backgrounds.[5] MSDE has named a replacement instrument that will begin to be used in the 2025-2026 school year. Because the new instrument has not yet been fielded, we include previous KRA results here while acknowledging the potential for bias. City Schools has also continued to administer the KRA for its own assessment and accountability purposes.

Rebounding from a decrease in the percentage of incoming kindergartners in Baltimore City who were assessed as demonstrating readiness in the years immediately following the pandemic, in school year 2023-2024, 39 percent were assessed as demonstrating readiness.

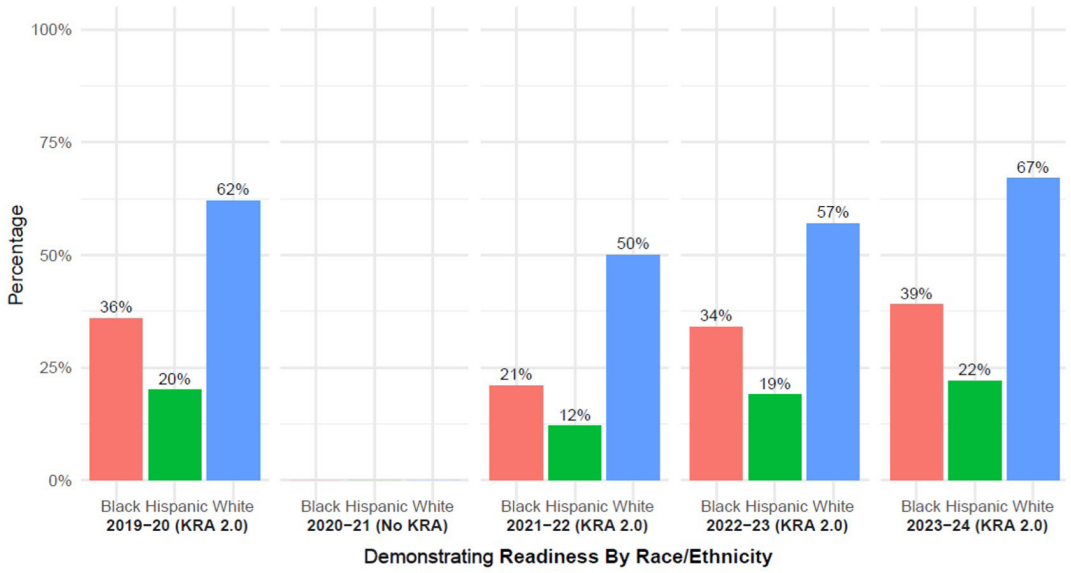
Figure 4. Baltimore City Kindergarten Readiness Assessment Trends



BERC, through its partnership with City Schools, disaggregated KRA results by population sub-groups and prior care settings. As evidenced in their analyses, the percentage of incoming kindergarteners assessed as demonstrating readiness varies greatly by race and ethnicity; by English Language Learners; and by those with Special Education status (Figures 5, 6, and 7). Please again note the potential for bias in the assessment that may under-assess actual readiness.

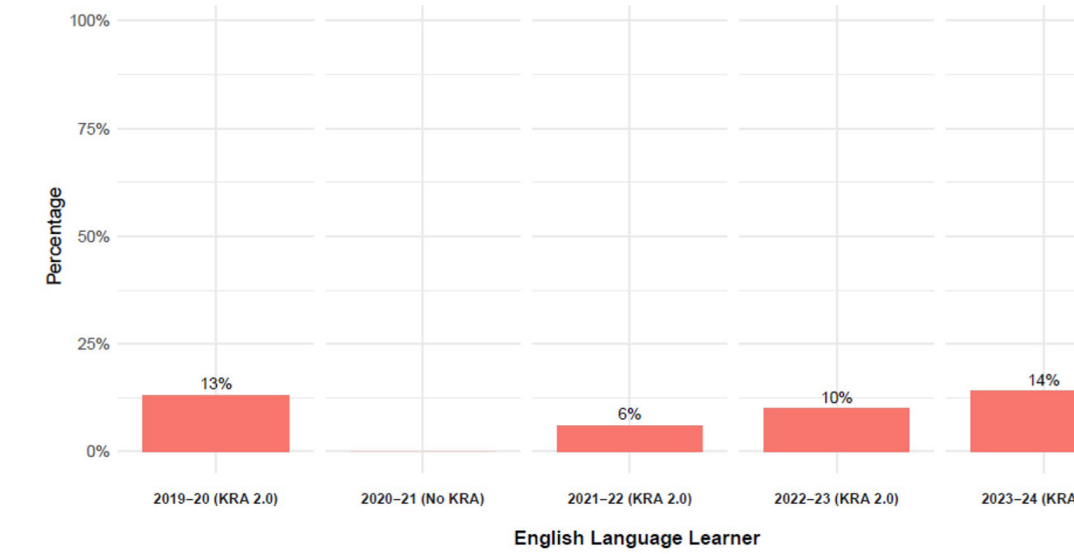
[5] Ready for Kindergarten Maryland, Maryland Kindergarten Readiness Assessment (KRA): Evaluation of Racial, Cultural or Linguistic Bias, Submitted to the Blueprint Accountability and Implementation Board, February 27, 2024.

Figure 5. Readiness by Race and Ethnicity



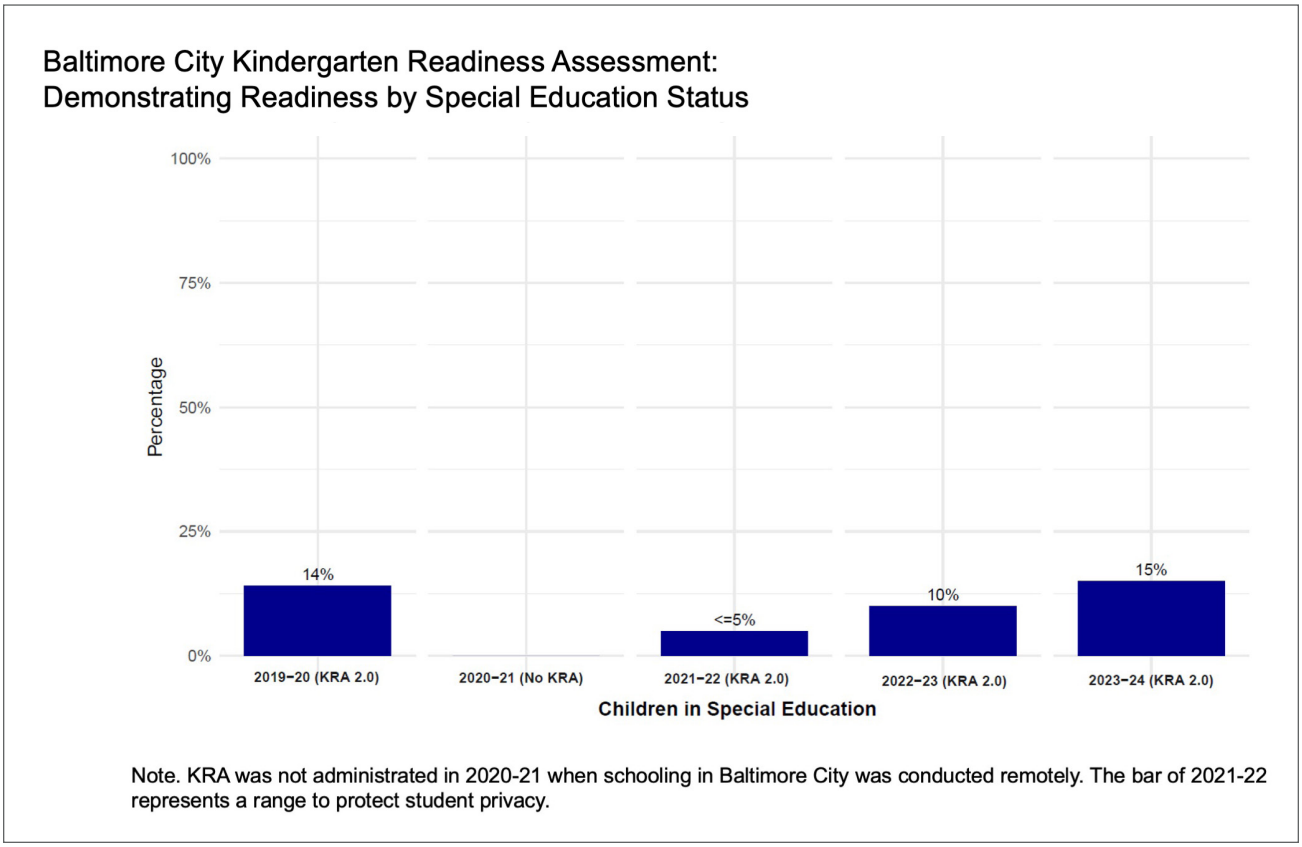
Note. KRA was not administrated in 2020-21 when schooling in Baltimore City was conducted remotely.

Figure 6. Readiness by English Language Learner Status



Note. KRA was not administrated in 2020-21 when schooling in Baltimore City was conducted remotely.

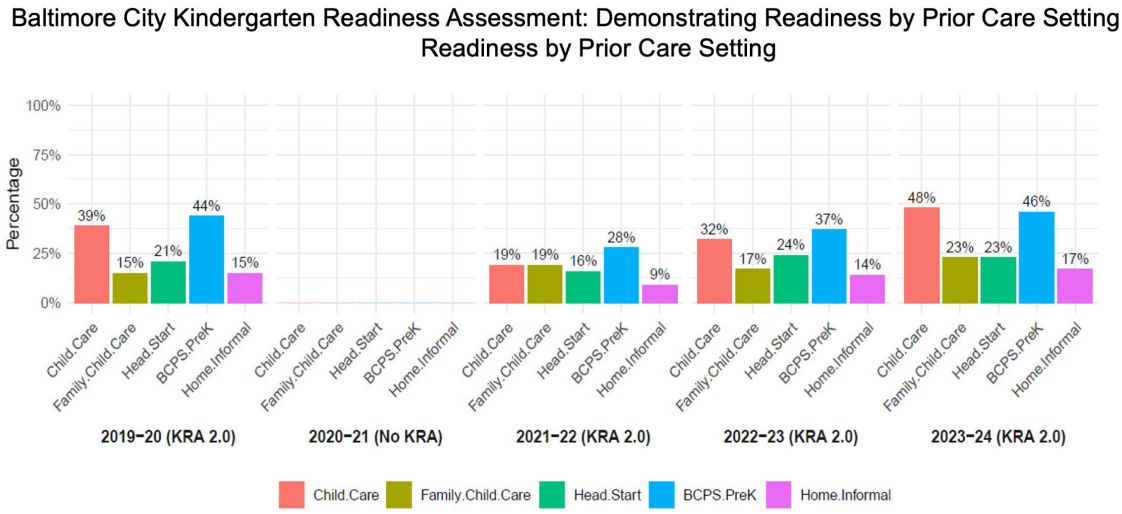
Figure 7. Readiness by Special Education Status



Kindergarten readiness as measured by the KRA tracks with what we know about income and poverty in the city; school readiness can be seen as a product of existing inequities.

That is part, but not all, of the story. Prior care settings are self-reported by parents except for children attending City Schools Pre-K whose actual student enrollment data are matched to their KRA assessment. Because of self-reporting, caution is warranted in interpreting the findings below. Indeed, relying on parent self-report for prior care settings has been a long-contested practice for Head Start providers. They assert that there are persistent and significant discrepancies between parent reports and actual rosters of enrolled children. They continue to advocate for unique child identifiers for children enrolled in prior care settings, even before they enter the school system for kindergarten, to improve accuracy and more reliably reflect the impact of prior care settings on school readiness. While noting these concerns, the data we do have indicate that kindergarten readiness is highest among children whose parents report they attended a child care center and then is followed by those who attended City Schools' Pre-K, where children from low-income families receive priority placement. Readiness is lowest among kindergartners whose parents reported they were in home or informal care. These trends hold across all years for which we have prior care reporting.

Figure 8. Kindergarten Readiness by Prior Care Setting



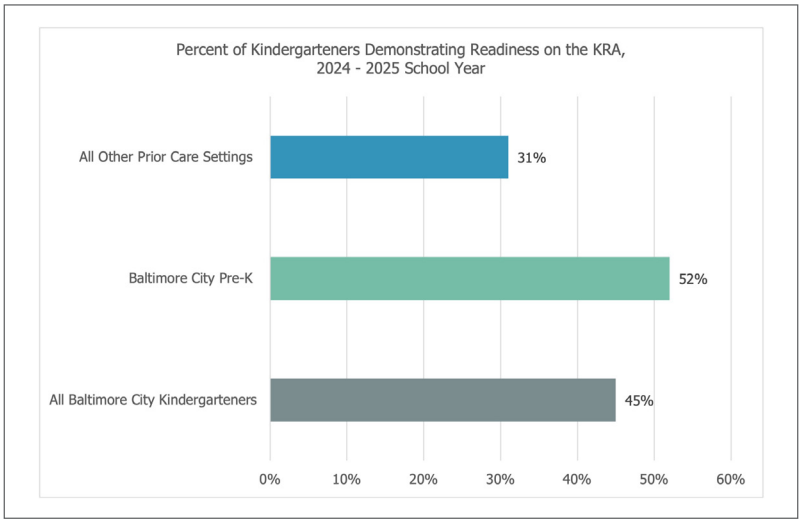
Note. Parent-reported prior care was used. For BCPS PreK, we used the City Schools enrollment data to improve accuracy. KRA was not administrated in 2020-21 when schooling in Baltimore City was conducted remotely. Other prior care options are omitted due to small cell sizes.

In school year 2023–2024, 46% of incoming kindergarteners who had attended Pre-K programs at City Schools as four-year-olds were assessed as demonstrating readiness, 48% of children whose parents reported they attended a child care center in the year prior to kindergarten were assessed as ready. Seventeen percent of children whose parents reported they were cared for at home or in an informal child care setting were assessed as demonstrating readiness.

In an important update: KRA results for the 2024-2025 school year were released by City Schools as this report was being finalized. Though not yet available to BERC for further analysis and disaggregation, an encouraging trend continues. Overall, 45% of entering kindergartners were assessed as demonstrating readiness, including 52% of those who attended Pre-K in City Schools (Figure 9).

Pre- and post-pandemic and in these and other analyses, there appears a clear relationship between participation in and type of early care and education and assessed readiness on entrance to kindergarten.

Figure 9. Baltimore City Schools: Kindergarten Readiness in School Year 2024-2025



Source: Baltimore City Public Schools, SY24-25 Kindergarten Readiness Assessment, February 11, 2024.

II. EARLY CARE AND EDUCATION

So just how available is early care and education for the city's young children? And what do we know about type, availability, quality, and cost?

Type and Availability

There are two principal settings in which early childhood care and education takes place in Baltimore:

- Center or group-based programs that include child care centers, Head Start, nursery schools, and public and private Pre-K classrooms; and
- Family-based programs that are licensed to provide child care in a private family home. Generally, these programs serve eight or fewer children with no more than two children under the age of two. There is also a licensing category of "Large Family Child Care Home," where a provider can serve up to 12 children with no more than four under the age of two.

Currently, we estimate that regulated early care and education opportunities in center and family-based programs – and including public Pre-K and Head Start – are available for half of the city's children under the age of five, and 20% of infants (Tables 8, 9, and 10). This may well be an overestimate of availability as it is a count of "seats" when individual children likely attend multiple settings over the course of a year. Reflecting the needs of working parents for year-round, full-day care, we also provide an estimate of coverage without including Pre-K, yielding a 36% coverage rate for children under 5.

Table 8. Estimated Early Care and Education Seats for Children Under Five in Baltimore City (as of May 2024)

Early Care and Education Setting	Number of Programs	Capacity
Licensed Family Care	382	2,999
Licensed Center (including Head Start)	283	13,890
Subtotal		16,889
Estimate for below age five (80% of subtotal)		13,511
City Schools Pre-K (2023–2024)		4,480*
Pre-K Expansion Sites (2023–2024)		267*
Estimated Total Capacity Early Care and Education		18,258

*Source: Maryland Family Network, LOCATE Child Care, May 2024 and Baltimore City Public Schools, Pre-K availability. Compilation by author. *These are 2023-2024 school year numbers and are used to be consistent with other data pulled in May of 2024. Elsewhere in this document, data from 2024-2025 are used.*

Table 9. Estimated Early Care and Education Seats for Infants in Baltimore City

Early Care and Education Setting	Capacity for Infants (0–11 months)
Licensed Family Care	733
Licensed Group Care (including Early Head Start)	767
Estimated Infant Capacity	1,500

Source: Maryland Family Network, LOCATE Child Care, May 2024

Table 10. Estimated Coverage by Children's Age and Number of Seats

Population	Estimated Population	Early Care and Education Capacity Estimate	Coverage?
Children Ages 0–5	37,232	18,258 with Pre-K	49%
	37,232	13,511 without Pre-K	36%
Infants	7,447	1,500	20%

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

Quality as Assessed by Participation in the Maryland EXCELS Quality Rating Program

The Maryland State Department of Education developed the Maryland Excellence Counts in Early Learning and School Age Care (or Maryland EXCELS) quality rating system for child care programs to support and promote quality care.[6]

The rating system, which is voluntary, is in addition to state licensing requirements and inspections and other program accreditation processes. It is intended to cover all child care and public Pre-K settings. Participating providers are rated 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; and
- Administrative Practices.[7]

[6] For more information about EXCELS, please see: https://www.marylandEXCELS.org/
[7] Ibid.

On top of meeting state licensing requirements, programs at EXCELS level 1 have demonstrated that they have annual parent-child meetings, a daily program schedule or lesson plan that address the developmental needs of each child, written policies for positive behavioral practices, developmental screenings, a family handbook and written agreements or contracts with families, and that they are willing to participate in quality rating and self-improvement. They are then eligible for participation in the Maryland Child Care Scholarship Program which provides funds to help cover the costs of child care for children whose parents are working or in school and have incomes at or below 75% of the state Annual Median Income. As programs demonstrate additional competencies such as credentialed staff, program accreditation, the use of high-quality learning materials, and developmentally appropriate activities, they can apply for advancement in the ratings.

Financial incentives for providers are tied to EXCELS participation. Incentives start with eligibility to participate in the Child Care Scholarship and then include tiered reimbursements as programs move up in their ratings, EXCELS Program Bonuses for participation, and access to the Child Care Capital Support Revolving Loan Fund which provides no-interest loans for capital expenses for providers.[8]

Participation in EXCELS is also required for publicly funded Pre-K programs under the Blueprint for Maryland's Future, whether these programs operate in public or private settings. Private and community-based programs must be at EXCELS level 3 or above to participate and have a plan for continued progress on the rating scale to reach level 5 within five years. Public school programs are to begin at a level 4 or above and reach level 5 within five years. City Schools began a system-wide effort to gain EXCELS ratings for its Pre-K classrooms in school year 2022-2023.

EXCELS ratings are made available to families seeking child care and are recorded in the Maryland LOCATE database. Tables 11 and 12 show the EXCELS rating levels for family and center-based child care programs in Baltimore in 2024 as recorded in Maryland LOCATE.

Table 11. Baltimore City Family-Based Programs and by EXCELS Level as of May 2024

EXCELS Level	% of Programs
Level 1	46%
Level 2	12%
Level 3	22%
Level 4	1%
Level 5	2%
No published level/not participating in EXCELS	17%

Table 12. Baltimore City Center-Based Programs by EXCELS Level as of May 2024

EXCELS Level	% of Programs
Level 1	45%
Level 2	6%
Level 3	24%
Level 4	3%
Level 5	4%
No published level/not participating in EXCELS	19%

[8] As summarized in Scoping Evaluation: Evaluation of the Maryland EXCELS Program. Maryland General Assembly, Department of Legislative Services, Office of Program Evaluation and Government Accountability, October 2022.

Seventy-five percent of Baltimore City family-based child care programs and 70% of center-based child care programs are below level 3 or not participating in EXCELS.

In presentation of preliminary findings to ECAC members, much discussion has ensued about the degree to which EXCELS serves as a true measure of program quality.[9] ECAC members report that many providers initially enrolled in the quality rating system to achieve level 1 and be eligible for the Maryland Child Care Scholarship Program but have not pursued further advancement. ECAC members also question whether families know about and place a value on the ratings. Finally, they seek evidence on the relationship between EXCELS rating and school readiness and other child development outcomes – evidence that does not appear to exist.[10]

Currently, participation and advancement in EXCELS is generally understood among local stakeholders to be more a reflection of provider interest and administrative capacity than a true measure of program quality. On the other hand, Maryland policy makers at MSDE and in the legislature have committed to the system as a means for allocating resources and guiding the expansion of early care and education across the state. How these positions are reconciled remains to be seen.

Until these positions are reconciled, and as long as EXCELS ratings drive public policy and investment, local effort should focus on supporting providers to enroll in the system and improve their ratings. To advance, providers note that staff dedicated to meeting the administrative requirements, filing paperwork, and following up with MSDE is often required. This can be a particular challenge for small and family-based programs.

Absent consensus and evidence about EXCELS and with low levels of program participation and advancement in the ratings, both policy makers and parents in Baltimore remain largely in the dark about child care quality. This is a matter of particular concern with respect to school readiness as the evidence on the effectiveness of early care and education programs is directly tied to the quality of such programs and the degree to which they provide content-rich, caring environments for children's play and exploration.

Geographic Distribution of Early Care and Education

To get a picture of the geographic distribution of early care and education programs across the city relative to where young children live, BNIA-JFI mapped data from Maryland LOCATE and City Schools over the average annual number of births. In Figure 9, family and center-based child care programs are differentiated by icons, which are sized according to program capacity and colored based on their EXCELS rating. The base map of average annual births is the same as the base map previously displayed in Figure 2.

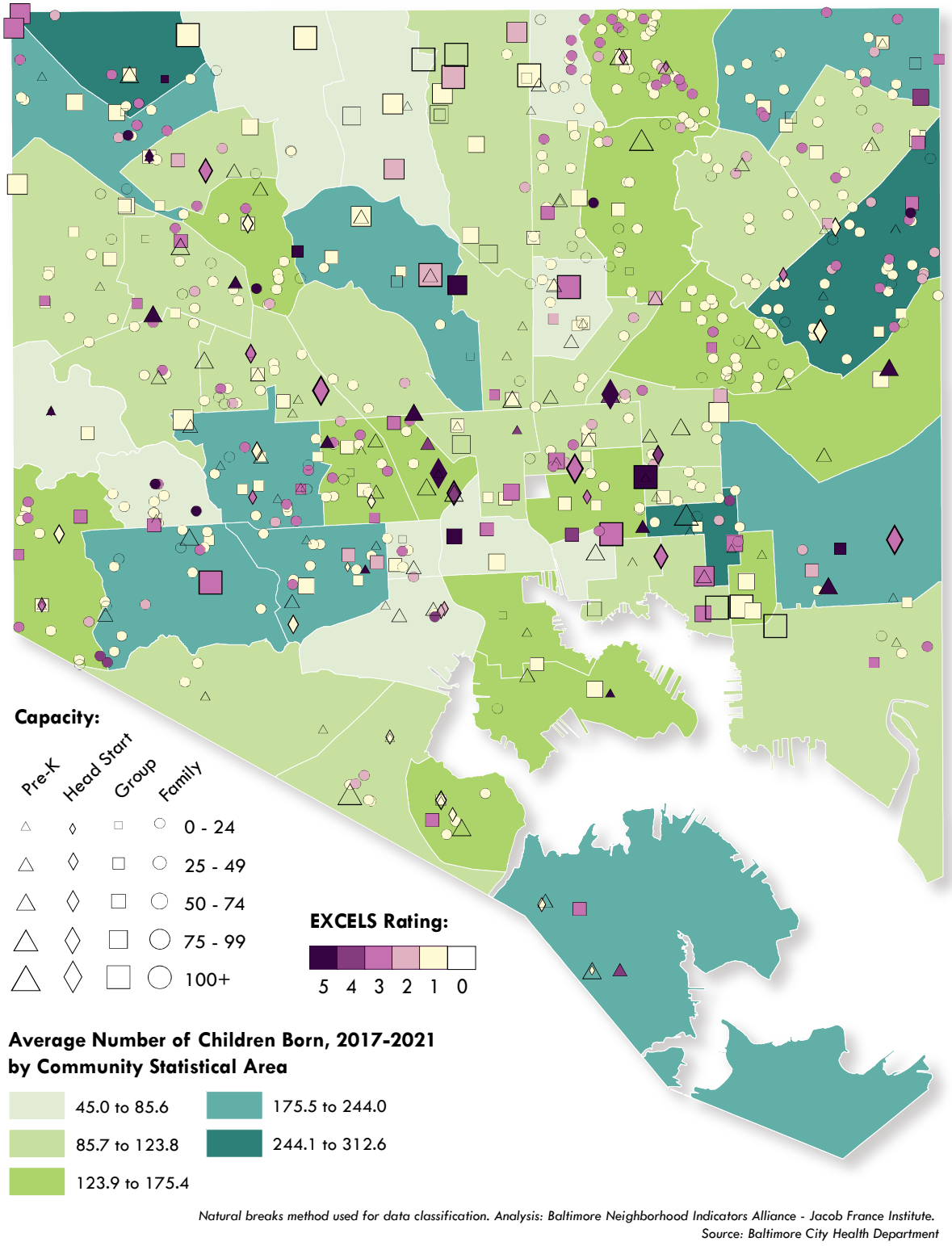
Some caveats to keep in mind about the data presented in this map and the ones that follow:

- Program location, capacity, and EXCELS rating data were pulled in 2024 and do not reflect any changes to the landscape since then.
- Programs not participating in EXCELS and/or without an EXCELS ranking are shown with an outlined (but not filled in) icon.
- It is not wholly accurate to associate program location with residential geography as a measure of the availability or utilization of care. Families may – and of course many do – travel outside their neighborhoods to seek care for their children.

Nevertheless, these data do give us a sense of how early care and education settings are distributed.

[9] Discussion of preliminary findings of the Early Care and Education Landscape Analysis, ECAC Retreat, September 2024.
[10] See, for example, Scoping Evaluation: Evaluation of the Maryland EXCELS Program. Maryland General Assembly, Department of Legislative Services, Office of Program Evaluation and Government Accountability, October 2022.

Figure 10. Early Care and Education by EXCELS Rating, Capacity, and Average Number of Babies Born.



Natural breaks method used for data classification. Analysis: Baltimore Neighborhood Indicators Alliance - Jacob France Institute.
Source: Baltimore City Health Department

Immediately apparent in Figure 10 are the large number of family and center-based programs at EXCELS level 1 and a relative lack of available licensed care in areas of the city – like Brooklyn/Curtis Bay/Hawkins Point and Cross Country/Cheswold – where there are relatively high numbers of babies being born. Also evident are several relatively large and highly rated programs at the city's core.

Table 13 displays the capacity of early care and education center-based program opportunities in a CSA divided by the estimated number of children under five with a resulting coverage estimate. Noted in the table here are the Community Statistical Areas for which there is a regulated early care and education program slot or seat (including Head Start and public Pre-K) for fewer than 50% of the children under age five. Brooklyn/Curtis Bay/Hawkins Point and Cross Country/Cheswold are indeed among the communities with low coverage estimates as the map above would indicate – but not the very lowest. (Table A-4 in Appendix A includes a coverage estimate for all the city's 55 CSAs.)

Please note that there are further limitations to this analysis:

- The coverage estimate does not include regulated family child care homes (where capacity is generally limited to eight children). The estimate is therefore artificially low.
- It does include all center-based child care (where seats or slots in these programs may also be used by children over the age of five).
- Cultural and family preferences may affect the use of regulated care and hence its limited availability in communities where high numbers of Orthodox and Hispanic families reside; and, as we note above,
- Families may well seek and use child care outside of their neighborhood.

Though imperfect given these limitations, this analysis is an estimate to identify the geography of availability – or the lack thereof – in licensed early care and education.

Table 13. Child Care Center Capacity and Coverage Estimates by CSA (< 50%)

Community Statistical Area	Sum of Child Care Center Capacity	Average Annual Number of Births	Births x 5	Coverage Estimate
Morrell Park/Violetville	56	110	549	10%
Penn North/Reservoir Hill	91	103	515	18%
Forest Park/Walbrook	124	116	578	21%
Brooklyn/Curtis Bay/Hawkins Point	279	244	1220	23%
Cross–Country/Cheswolde	401	313	1563	26%
Canton	164	123	613	27%
Inner Harbor/Federal Hill	203	147	737	28%
Greater Lauraville	169	121	605	28%
Westport/Mount Winans/Lakeland	177	124	619	29%
Midway/Coldstream	140	97	483	29%
Oldtown/Middle East	208	138	692	30%
Patterson Park North & East	424	282	1410	30%
Greektown/Bayview	352	218	1089	32%
Southeastern	192	114	571	34%
Chinquapin Park/Belvedere	156	86	428	36%
Southern Park Heights	292	156	778	38%
Hampden/Remington	439	222	1108	40%
Highlandtown	317	157	783	40%
Beechfield/Ten Hills/West Hills	316	150	752	42%
Greater Charles Village/Barclay	249	116	581	43%
Cherry Hill	303	139	693	44%
Edmondson Village	182	83	415	44%
Southwest Baltimore	469	210	1049	45%
Northwood	308	133	664	46%
Pigtown/Carroll Park	156	66	331	47%
Belair–Edison	419	175	877	48%
Glen–Fallstaff	479	199	993	48%
Madison/East End	282	116	580	49%

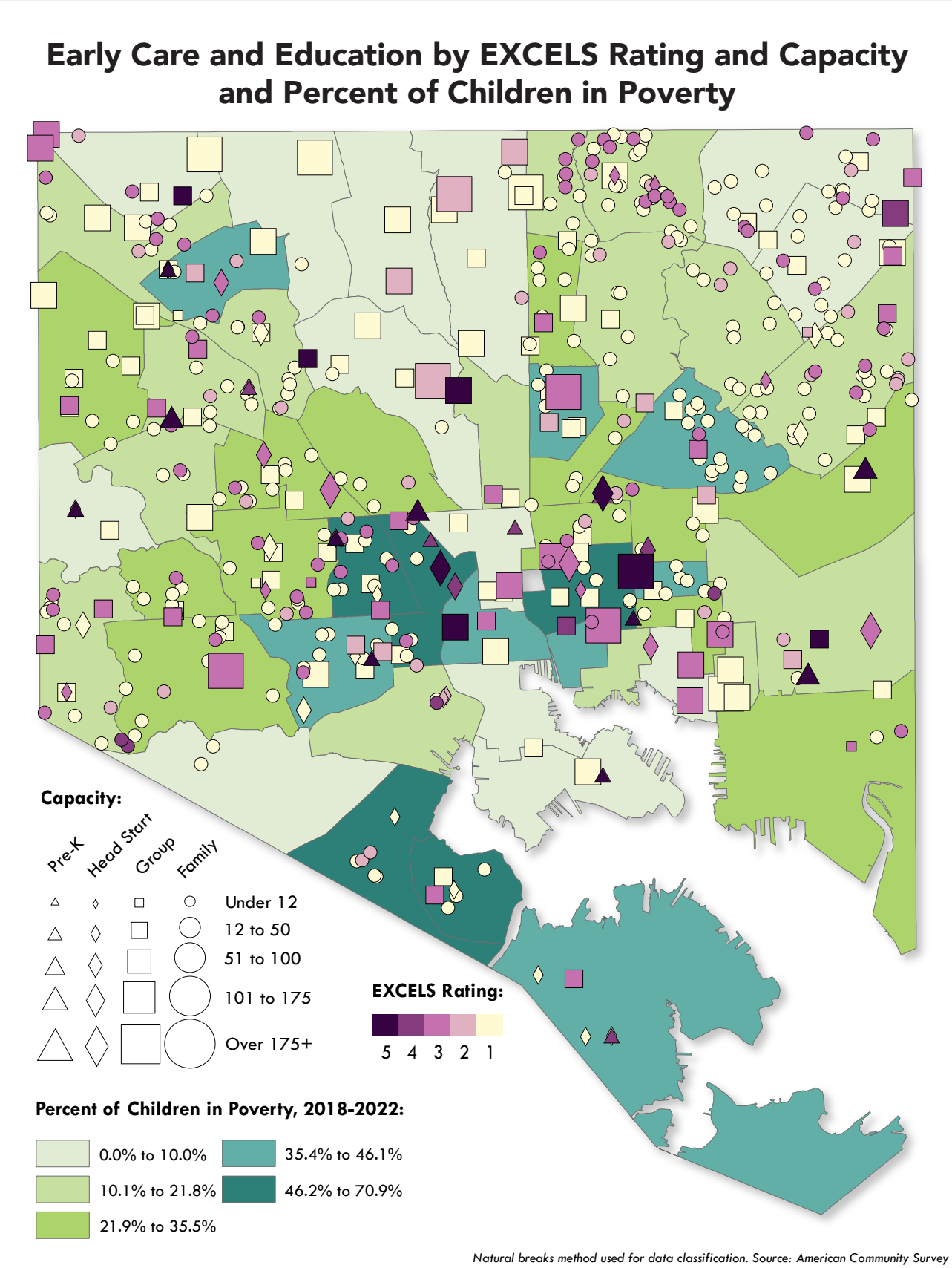
Distribution of Early Care and Education by Percent of Children in Poverty

The benefits of early care and education for low-income children are well documented,[11] but how well is the current infrastructure reaching these children?

Figure 11 uses data from the U.S. Census American Community Survey to map the availability of care over the percentage of children under age 18 in poverty.

[11] See, for example, Campbell, Frances A and Pungello, Elisabeth, High Quality Child Care Has Long-Term Educational Benefits for Poor Children, The Frank Porter Graham Child Development Center, University of North Carolina at Chapel Hill, for Head Start's Fifth National Research Conference, June 2000.

Figure 11. Early Care and Education by EXCELS Rating and Capacity and the Percentage of Children in Poverty



Natural breaks method used for data classification. Source: American Community Survey

Areas with high percentages of children in poverty are primarily served by small, family-based programs. Many of these programs are at EXCELS level 1. There are 10 CSAs with child poverty rates greater than 30% where there is a center-based child care spot for fewer than half of children under age five.

Table 14. Children in Poverty Greater than 30%, Coverage less than 50%. Ranked by the Percentage of Children (0-18) in Poverty

Community Statistical Area	Sum of Center Capacity	Average Annual Number of Births (2017–2021)	Estimated Number of Children 0–5	Coverage Estimate	Children in Poverty (2018–2022)
Westport/Mount Winans/Lakeland	177	124	619	29%	59%
Oldtown/Middle East	208	138	692	30%	55%
Cherry Hill	303	139	693	44%	53%
Madison/East End	282	116	580	49%	45%
Southwest Baltimore	469	220	1049	45%	45%
Belair–Edison	419	175	877	48%	42%
Brooklyn/Curtis Bay/ Hawkins Point	279	244	1220	23%	42%
Edmondson Village	182	83	415	44%	35%
Midway/Coldstream	140	97	483	29%	35%
Patterson Park North & East	424	282	1410	30%	31%

Distribution of Early Care and Education by Race and Ethnicity

The next three maps show the distribution of early care and education programs over the percentage of the population that is Hispanic, Black, and White respectively. Clear patterns in the distribution of programs emerge:

- There are very few regulated early care and education programs in areas of the city where the largest percentage of Hispanic families reside.
- There are many small family-based programs, most of these at EXCELS level 1, in areas of the city where the largest percentage of Black families live; and
- There are a number of large center-based programs, also at EXCELS level 1, in predominantly White areas of the city; many of these are nursery schools at religious institutions and private schools.

Figure 12. Early Care and Education by EXCELS Rating and Percent of Population – Hispanic

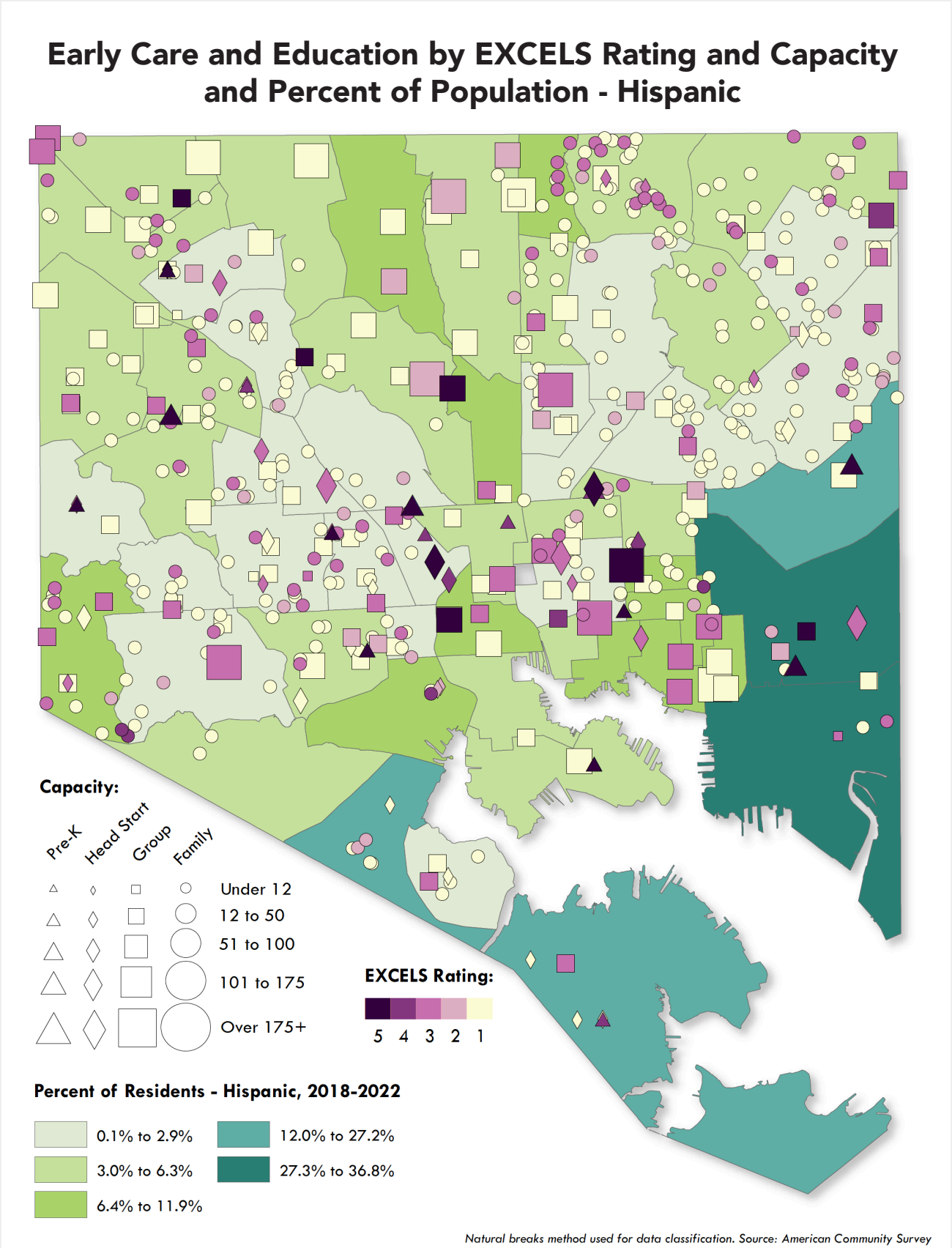


Figure 13. Early Care and Education by EXCELS Rating and Percent of Population – Black

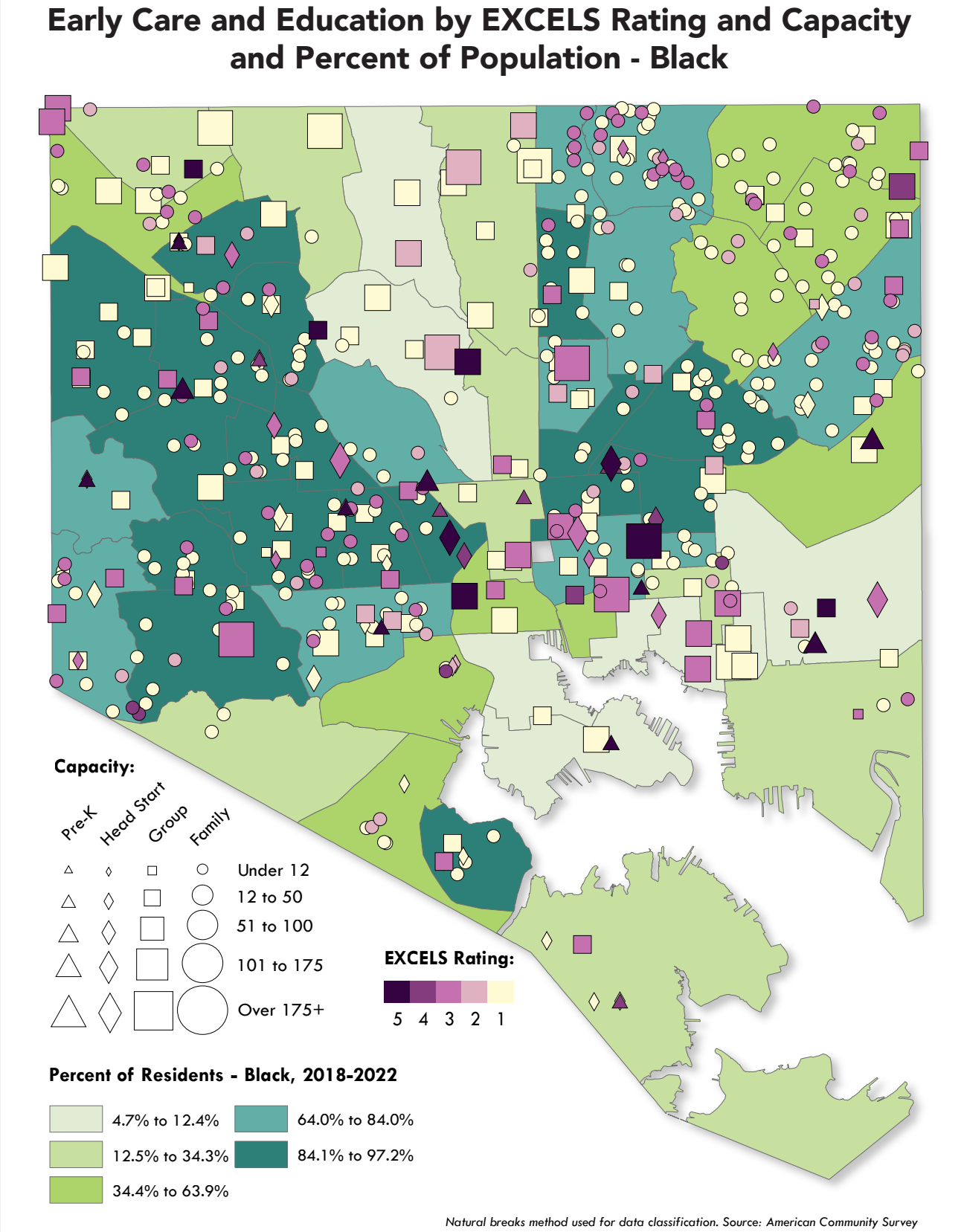
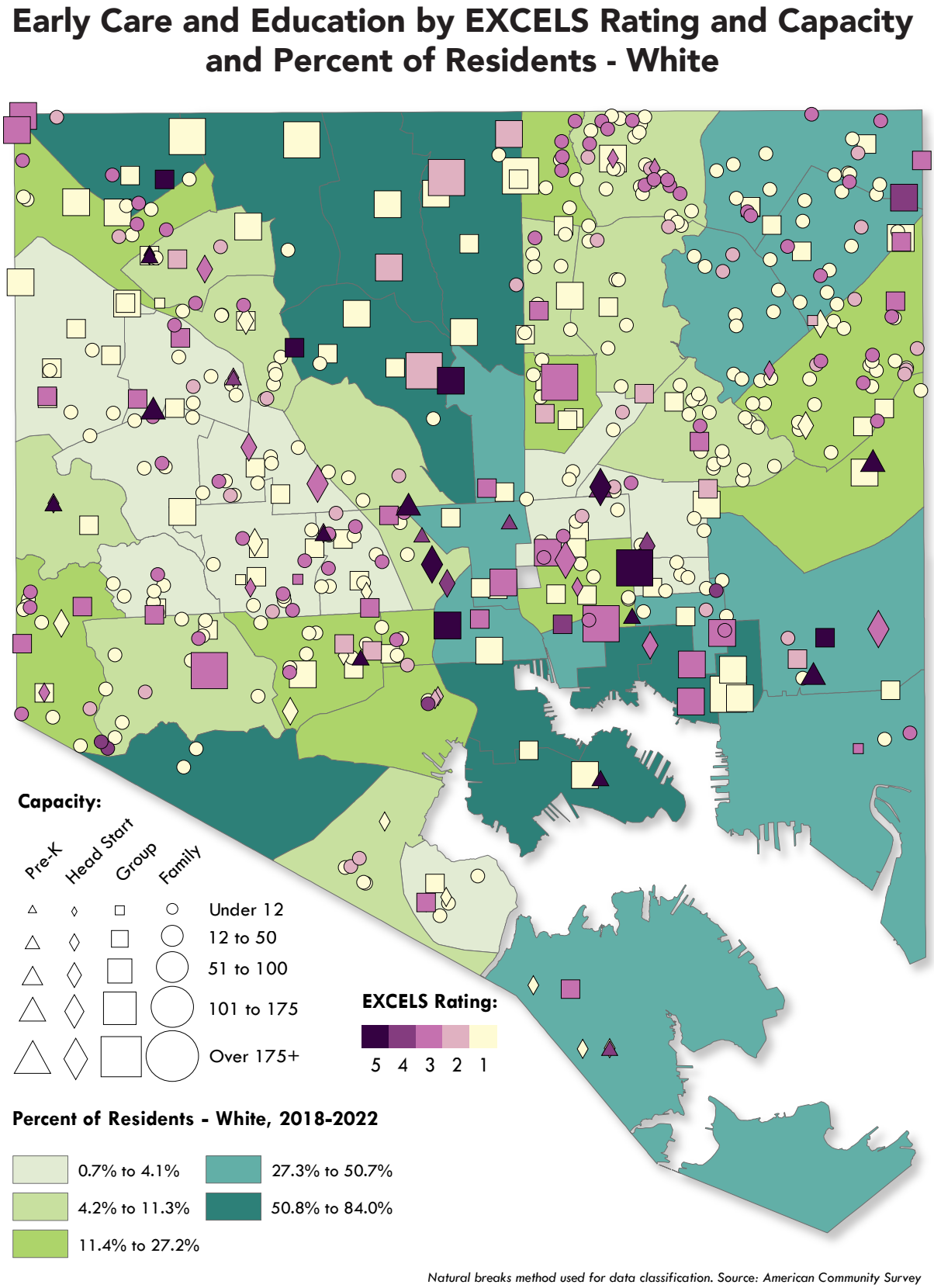


Figure 14. Early Care and Education by EXCELS Rating and Percent of Population – White



Child Care Coverage for Working Parents

Thus far in this analysis we have used estimates of the total population of children under the age of five to discuss and describe child care availability. But, of course, family preferences and the ability of family members to provide care directly affect demand. Though there is no true measure, another way to think about supply and demand is to adjust for the percentage of children who have parents in the workforce.

Maryland Family Network logs calls to its LOCATE Child Care data service. Far and away parents cite work demands as the reason they are seeking child care.

Table 15. Baltimore City Parents Requesting Child Care Information from Maryland Locate Child Care

Reason Child Care Is Needed	Percent of Callers
Work demands of parent's job	77%
Parent looking for employment	7%
Dissatisfied with current arrangement	1%
Parent attending job training	4%
Parent attending school	6%
Educational opportunities for children	3%
Child's behavioral needs	0%
Socialization	1%
Program closing	0%
Other	1%

Source: Maryland Family Network, Child Care Demographics 2024: Baltimore City

According to the latest American Community Survey, 64% of Baltimore City children have both parents in the workforce. Because working parents are likely to need access to full-day child care throughout the calendar year, we provide an estimate without Pre-K seats. With these adjustments, we estimate regulated child care is available for 57% of children under the age of five who have both parents in the workforce, and 31% of infants. This too is an overestimate of availability versus demand as it would assume that child care seats only go to working parents, when there are other reasons a parent may need care, including their pursuit of education and training.

Table 16. Estimated Child Care Coverage for Working Parents

Population	Total	64% of Children with Both Parents in Workforce	Early Care and Education Capacity Estimate	Coverage?
Children Ages 0–5	37,232	23,828	13,511	57%
Infants	7,447	4,766	1,500	31%

III. How Affordable and Accessible Is Early Care and Education?

> *"It's a lot with the children. I lost two jobs due to not having consistent day care… I did have a family friend… but I kept having to call out of work for her (my daughter) … and her father was helping… but that didn't work out either. I went to school for my CNA/GNA but ended up losing my job. I was only working part time, child care wasn't available, I called around for infants, but it just wasn't available."*
>
> *— Participant in Family Tree's Parent Coalition organizing meeting, September 2024*

Maryland Family Network collects information on the cost of care as a part of its LOCATE Child Care service and as a data point in annual reports on child care availability prepared for each jurisdiction in Maryland. Table 17 presents data from the 2024 Baltimore City Child Care Demographic Report for family and center-based care for infants and children ages two to four.

Table 17. Average Weekly Cost of Care

Average Weekly Cost of Care in Baltimore City, 2023		
	Family Care	Center Care
0–23 months	$199.29	$294.36
2–4 years	$167.28	$226.22

Source: Maryland Family Network, Child Care Demographics 2024: Baltimore City

At an annualized rate, the Maryland Family Network estimates that a typical family of four earning the median annual income for Baltimore City can expect to pay more than 30% of their income in child care expenses (Figure 15). Federal policy sets a guideline that families should pay no more than 7% of their income on child care.[12] Some 60,000 Baltimore families have earnings that place them at or below the median income.

[12] New Rule to Improve Child Care Access, Affordability, and Sustainability, February 29, 2004. Accessed at: https://www.acf.hhs.gov/occ/news/new-rule-improve-child-care-access-affordability-and-stability-ccdf

Figure 15. Child Care Costs as Compared to Other Major Household Expenses

Child Care Costs as Compared to Other Major Household Expenses

The estimated current median family income in Baltimore City is $72,972[6]. 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		$ 22,982.96	31%
Infant[1]	$10,483.20		
Preschooler[2]	$12,499.76		
Food[3]		$ 2,946.00	4%
Housing[4]		$ 20,088.00	28%
Taxes[5]		$ 15,752.00	22%
Total		$ 38,786.00	53%

[1] Average cost of full-time care in a family child care home (LOCATE, 2023). [2] Average cost of full-time care in a child care center (LOCATE, 2023). [3]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 2023), U.S. Average, United States Department of Agriculture). [4]Based on U.S. Bureau of the Census 2020 median selected owner costs with a mortgage; included mortgage, taxes, insurance and utilities. [5]State and local taxes per Comptroller of Maryland (2023), Medicare and FICA taxes per moneychimp.com (2023). Taxes do not reflect Earned Income Credit. [6]Current income as shown in the Geolytics Report dated July 2023. This data cannot be compared to previous data.

Source: Maryland Family Network, Child Care Demographics 2024: Baltimore City

Table 18. Annual Income and Benefits of Baltimore City Families, American Community Survey, 2022

Annual Income and Benefits	Percent of Families (n=121,876)
Less than $10,000	7.1%
$10,000 to $14,999	2.7%
$15,000 to $24,999	5.6%
$25,000 to $34,999	7.5%
$35,000 to $49,999	13.7%
$50,000 to $74,999	17.1%
$75,000 to $99,999	12.3%
$100,000 to $149,999	15.3%
$150,000to $199,999	8.5%
$200,000 or more	10.3%

Source: U.S. Census American Community Survey, Income and Poverty, one-year average for Baltimore City, 2022.

At the median, average child care costs exceed 30% of annual income. Using the city's median annual income further masks significant differences by race and ethnicity. For example, Black families have roughly half the median annual income of White families. The already high annual costs of child care are not borne equally by the city's families.

Table 19. Median Income in Baltimore City by Race/Ethnicity of Householder, 2018-2022

Race/Ethnicity of Householder	Median Annual Income, 2018–2022
White	$91,250
Black	$46,523
Asian	$69,081
Hispanic	$66,911
Two or More Races	$69,823
Other Race	$60,913

Source: BNIA analysis of the American Community Survey, five-year average, 2018–2022.

For additional exploration of the geography of family economic stress in accessing and paying for child care in Baltimore, please see Appendix B where early care and education opportunities are mapped over the percentage of families paying more than 30% of their income for housing expenses and the percentage of families receiving Temporary Assistance to Needy Families (or TANF) support.

The Baltimore Young Families Success Fund

Survey results from participants in the Baltimore Young Families Success Fund (BYFSF) provide another window into just how challenging securing and paying for child care can be.

The BYFSF is a two-year guaranteed income demonstration program funded by Baltimore City with resources from the American Rescue Plan Act (ARPA), city general funds, and contributions from private philanthropy. The BYFSF was designed to provide cash payments directly to young parents or caregivers ages 18 to 24 so that they can make financial decisions and investments in their own and their children's well-being.

Abt Associates, a D.C. based research and consulting firm, is the evaluation partner for this effort. The CASH (Creating Assets Savings and Hope) Campaign of Maryland is the program administrator.

More than 4,000 Baltimore parents applied to participate. To be eligible, applicants needed to be a Baltimore City resident, have full or partial caretaking responsibility for young children, and have a household income at or below 300% of the Federal Poverty Level. One hundred and fifty-six applicants were randomly selected to receive an unconditional cash payment of $1,000 a month over 24 months. Of those selected, 130 are participating in a series of surveys and follow-up interviews conducted by Abt to assess the impact of the effort. An additional 156 families who applied serve as a comparison or control group and participate in the surveys and follow-up activities but do not receive the cash payment. At the time of their enrollment, the average age of participants was 22 years old. Participants had caregiving responsibilities for one or two children and an average annual household income of between $12,000 and $14,500. Over 60% were working.

Included in the baseline and one-year follow-up surveys are a series of questions about child care availability, affordability, and the decisions young families make when balancing the need to work along with caring for young children.

Documented in Table 20 are survey responses from both the participating families in the treatment group (i.e., those who are receiving the cash benefit) and the control group in a one-year follow-up survey that was published in June 2024. Overall, the follow-up after one year finds that those receiving the guaranteed

income payments are faring better than the control group in measures related to income, housing, and mental health. Both groups of families, however, appear equally stressed when it comes to child care.[13] They have missed and been late for work, turned down opportunities for additional employment and education because of child care needs, and received little or no support for child care from their employers.

Children in participating families spend between 40 and 50 hours a week in child care; 63% of children are cared for by a parent, stepparent, or guardian. Only 16% attend a licensed child care program or Early Head Start/Head Start. Over 50% of parents in both the treatment and control groups say the biggest obstacle they face in securing coverage is the lack of affordable child care.

Table 20. Select Survey Responses Related to Child Care from Guaranteed Income After One Year[14]

	Treatment	Control
Over the last month have any of the following happened to you specifically because of child care issues?		
Missed a Day of Work	41%	38%
Late for Work	35%	35%
Over the last year have any of the following happened to you specifically because of child care issues?		
Reprimanded for missing work	11%	10%
Quit my job	17%	26%
Fired from my job	15%	19%
Turned down a job offer	27%	27%
Declined to pursue further education or training	21%	16%
Over the last year have you received any of the following types of support from an organization that employed you?		
Child care program on site of employer	1%	2%
Financial support for child care from employer	4%	1%
Flexibility/tolerance from employer w/respect to child care needs	1%	2%
What type of child care arrangements are used for your children?		
Stays home with parent, stepparent, or guardian	63%	63%
Stays home with other family member	29%	31%
Stays home with babysitter	3%	8%
Stays in another home with an unrelated person who cares for a few children	5%	3%
Attends licensed home-based program	4%	3%

[13] For more about the Baltimore Young Families Success Fund and findings at one year, please see: Abt Associates, Guaranteed Income After One Year in Baltimore, June 26, 2024. Survey results reported here can be found in the Appendix to this cited report.
[14] Abt Associates, Guaranteed Income After One Year in Baltimore – Interim Brief, June 2024, Appendix B: Baseline Characteristics in the Analytic Sample.

	Treatment	Control
Attends licensed child care center	6%	5%
Attends Early Head Start/Head Start	6%	8%
Hours per week child receives child care	42	50
What challenges do you face when accessing child care?		
Lack of opening at a child care provider	13%	14%
Lack of affordable care	58%	50%
Inconvenient location	24%	23%
Accommodating work schedule	27%	27%
Lack of back-up or emergency care or care for a sick child	20%	22%

Women's Labor Force Participation

Further evidence on the pressures working families face in finding and accessing quality child care comes from both national and local economic analyses on labor force participation.

In December of 2024, the office of Maryland Comptroller Brooke Lierman released a special report in its State of the Economy Series on child care.[15] Key findings from this report include:

- The labor force participation rate of women with children under 6 years old in Maryland, at 80.8%, is almost 6 percentage points below that of women of the same age who do not have children. Labor force participation rates have picked back up since the pandemic. However, women with young children still lag women without children and are far behind men with young children in the rate of labor force participation.
- With respect to the early care and education workforce in Maryland, wages remain low, and few caregivers have benefits.
- The cost of child care in Maryland is high relative to other states, though the expanded Child Care Scholarship Program (more on this below) is helping to address affordability.

A Broken System

In the end, the Comptroller concurs with the assessment of the U.S. Treasury Department that has called the nation's child care system a "market failure." In 2021, Treasury released the Economics of Child Care Supply, a report analyzing America's child care system. The report demonstrated how the private, market-based system fails to meet the needs of many families, concluding:

> "Parents are unable to afford high child care costs, providers operate on razor-thin margins maintaining slim profits, and child care workers earn low wages and have high turnover…Underinvestment has worsened families' access to high-quality child care options and resulted in a bleak current state of affairs, in which early childhood education is unaffordable, inaccessible, and of low quality for many families."[16]

[15] Comptroller of Maryland, State of the Economy Series: Child Care and the Economy, December 2024.
[16] The First Five Years Fund, Treasury Department Report Highlights Market Failures in America's Child Care System and How Build Back Better Can Help, accessed at: https://www.ffyf.org/resources/2021/09/treasury-dept-report-highlights-market-failures-in-americas-child-care-system-and-how-build-back-better-can-help/

In Baltimore, we can see the result of the child care market failure in the high costs families pay for care, the suppressed labor force participation of women with young children, the use of informal care so that parents can get to work (as evidenced in the Baltimore Young Families Success Fund program), the lack of care for infants, and the low wages of child care workers.

The Maryland Child Care Scholarship Program

To ease the affordability and access crisis and commit new resources to families and providers, the administration of Governor Wes Moore and the Maryland General Assembly made significant new investments in the Child Care Scholarship Program (CCS), totaling over $500 million dollars in new state funds in fiscal years 2024 and 2025.

With the new investments, Maryland expanded eligibility to families earning up to 75% of the state's average median income (up from 65%) and instituted presumptive eligibility – families are now awarded a temporary scholarship for 60 days as their applications are reviewed and verified. Maryland also waived co-payments for most families.

Over the first two years of increased investment, there was a more than 120% increase in the number of Baltimore City children and families receiving Child Care Scholarship support and a greater than 230% increase in the amount of funding drawn down by families from Baltimore City.

Table 21. The Maryland Child Care Scholarship Program: Baltimore City Children, Families, and Payments

State Fiscal Year	2022	2023	2024	Change 2022-2024	% Change Since 2022
Children using CCS	2,580	4,087	5,777	+ 3,197	+ 124%
Families using CCS	1,655	2,658	3,888	+ 2,233	+ 135%
Total CCS Payments Made for Baltimore City Children	$16,444,415	$39,837,519	$55,292,741	+$38,848,326	+ 236%

Source: Maryland State Department of Education, Child Care Scholarship Data, accessed at: https://earlychildhood.marylandpublicschools.org/data
Note: Counts of children and families are unduplicated counts as of June 30 of each State Fiscal Year.

In the state budget for the 2026 fiscal year, officials agreed to maintain the existing level of funding, but under pressure from ongoing projected shortfalls, they also:

- Froze new enrollment in the program as of May 1, 2025.
- Capped total enrollment at 40,000 children statewide (for a new child to be enrolled, a formerly enrolled child will have to exit the program).
- Instituted a waiting list that will first prioritize children from the lowest-income families; and
- Delayed a scheduled update and lowered the reimbursement rate paid to providers.[17]

[17] Reimbursement rates are set on the basis of an annual "Market Rate Survey" that estimates the average cost of care across seven regions in the State. For the last two fiscal years, providers were reimbursed at 70% of the market rate in their region. Moving forward, the reimbursement rate has been dropped to 60% of the regional market rate.

Over the previous two fiscal years, the Child Care Scholarship Program has provided real relief and expanded opportunities for many more Baltimore City children and families – more than twice as many since before the program's expansion. How changes made in response to budget pressures will affect this progress remains to be seen.

Indeed, advocates caution that:

- Providers who primarily serve children who receive the CCS will be disproportionately impacted by the fact that the reimbursement rate is not keeping pace with the cost of providing care.
- Parents/families who are unable to receive a scholarship due to the enrollment freeze may be forced to choose a less-than-ideal care setting.
- Families who need child care scholarships for before and after school care or summer care may be frustrated by the enrollment freeze when their needs for care shift during the summer or when the school year begins.

The length of time the enrollment freeze will be in place is unknown.

IV. How Has the Availability and Cost of Child Care Changed Since the Pandemic?

Using data pulled from Maryland LOCATE for the *2019 Baltimore City Early Care and Education Landscape Analysis*[18] in comparison to LOCATE data pulled for this update, measurable changes in the availability and cost of child care in Baltimore post-pandemic are apparent:

- There are 111 fewer family-based child care programs, a 23% decrease in the number of such programs and a 21% decrease in their capacity.
- There are six fewer center-based programs, a decrease of 2% in the number of programs but a decrease of 11% in the overall capacity of center-based programs (including both those that closed and other decreases in ongoing programs), resulting in 1,665 fewer seats overall.
- Costs have risen by between 8% and 21% depending on the type of program and the age of a child.

Table 22. Pre- and Post-Pandemic Changes in the Available Early Care and Education Programs and Capacity

	Nov. 2019		May 2024		Change		% Change	
	Programs	Capacity	Programs	Capacity	Programs	Capacity	Programs	Capacity
Family	493	3,779	382	2,999	-111	-780	-23%	-21%
Center	289	15,555	283	13,890	-6	-1,665	-2%	-11%

Source: Maryland Family Network, Maryland LOCATE data set, November 2019 and May 2024. Analysis by author.

Table 23. Pre- and Post-Pandemic Changes in the Cost of Early Care and Education

Average Weekly Cost of Full-time Child Care				
	2020	2023	Change	% Change
Family				
0–23 months	$178.38	$199.29	+$20.91	+11.72%
2–4 years	$145.25	$167.28	+$22.03	+15.17%
Center				
0–23 months	$271.53	$294.36	+$22.83	+8.41%
2–4 years	$187.54	$226.22	+$38.68	+20.62%

Source: Maryland Family Network, Child Care Demographics Reports for 2020 and 2024. Analysis by author.

[18] Baltimore City Early Childhood Care & Education Landscape Analysis, April 2020. Accessed at: https://ecacbaltimore.org/wp-content/uploads/2022/04/Baltimore-City-ECCE-Report-Final_080320_Compressed.pdf.

V. Pre-Kindergarten Expansion in Baltimore and the Blueprint for Maryland's Future

Passed during the 2021 General Assembly session, the Blueprint for Maryland's Future is the state's landmark initiative intended to provide a world-class education to every public school student in Maryland.

The Blueprint has five "pillars" – or priority areas:

- Early childhood education
- High-quality and diverse teachers and leaders
- College and career readiness
- Resources for all students to be successful
- Governance and accountability

The early childhood priority – often referred to as Pillar One – includes:

- An expansion of full-day Pre-K to low-income three- and four-year-olds.
- An effort to build capacity and improve quality for new and existing Pre-K programs by supporting providers with tuition assistance, training, and peer support.
- An expansion of Judy Centers, Patty Centers, and the Maryland Infants and Toddlers Program to provide and coordinate services for young children and their families.[19]

State funding for Pre-K expansion under the Blueprint is tied to priority categories, or "tiers."

- The cost for three- and four-year-olds who are in foster care, receive TANF, are homeless, have a disability, are English Language Learners, or are from families whose earnings place them at or below 300% of the Federal Poverty Level is covered by public funding. These children are prioritized as Tier I.
- There is a proposed sliding scale for family co-payments along with public funding for those whose families earn between 301% and 600% of the FPL. These children are prioritized as Tier II.
- Children from families who earn more than 600% of the FPL fall into Tier III. Under the Blueprint, their families are to pay tuition.

Local school systems can, however, waive the family payment requirements for Tier II and Tier III children if local systems cover the costs. Thus far, Baltimore City Schools has waived payment requirements for all families.

[19] For more on the Blueprint, see: blueprint.marylandpublicschools.org.

Priority Tiers and State Reimbursement Rates for Pre-K Expansion

Tier	Eligibility	State Reimbursement Rate*
Tier I	Family income at or below 300% of Federal Poverty Level (FPL) or: + Homeless + TANF recipient + in Foster Care + English Language Learner	100%
Tier II	Family income between 301%–600% of FPL	Sliding scale
Tier III	Family income above 600% of FPL	Zero (family pays)

*Local school systems can waive family payments if these systems cover the costs.

The Accountability and Implementation Board, which was established to oversee the Blueprint rollout and ensure fidelity to its goals, set the following schedule for scaling up Pre-K:

Initial Timeline for Pre-K Expansion

Blueprint Pillar One Component	Timeline
Expand access to free full-day Pre-K for low-income three- and four-year-old children (up to 300% of FPL)	Fiscal Year 2026 School Year 2025–2026
Expand Pre-K access to four-year-old children between 301%–600% on a sliding scale	Fiscal Year 2025 School Year 2024–2025

To support the expansion of Pre-K under the Blueprint and utilize existing facilities and program capacity, Maryland is advancing a mixed delivery system where both public schools and private and community-based providers (like Head Start, child care centers, and family child care homes) can participate in delivering publicly funded Pre-K programs if they meet certain requirements.

Requirements for private and community-based programs to deliver publicly funded Pre-K under the Blueprint include:

- Be a licensed child care program or a federally funded Head Start program.
- Have not incurred any serious health or safety violations.
- Have an EXCELS rating of 3 or above.
- Have staff that meet Blueprint credentials and requirements and are paid commensurate with public school system teachers.

If programs meet these requirements, they can apply for a Prekindergarten Expansion Grant from the Maryland State Department of Education. Grantees can be approved for grant renewal or formula funding in subsequent years. Funded mixed delivery partners are expected to have a plan to reach EXCELS level 5 and achieve program accreditation from the appropriate credentialling body within five years.

The proposal to use a mixed delivery system also acknowledges an existing tension in the expansion of publicly funded programming for three- and four-year-olds. Publicly funded seats have the potential to draw children from private and community-based providers who rely on their tuition for solvency and sustainability. By folding these providers into the mixed delivery system, they too become eligible for public support.

Alongside the timeline for expansion, the Blueprint laid out a timeline for jurisdictions to achieve a 50/50 split in public and mixed delivery Pre-K programs – initially set for 2027.

In 2024, the General Assembly altered the timeline for the mixed delivery system, as noted in the following chart. While the intention remains to achieve a full 50/50 split, the end date has been moved to the 2028-2029 school year. Local school systems have been able to request waivers from meeting the mixed delivery targets. To date, all 24 Maryland jurisdictions have requested and received these waivers.

Timeline and Schedule for Mixed Delivery

School Year	Required Pre-K Seats Provided by Eligible Private/Community-based Providers
2024–2025	10%
2025–2026	20%
2026–2027	30%
2027–2028	40%
2028–2029	50%

In January 2025, the Maryland State Board of Education and the Accountability and Implementation Board issued a joint policy statement establishing an implementation directive that:

- Local school systems focus on ensuring all eligible Tier I four-year-olds are served.
- Private providers, including Head Start providers, focus on serving Tier I three-year-olds and Tier II and Tier III four-year-olds.
- Private providers may choose to serve Tier I four-year-olds. Public providers may choose to serve Tier II and Tier III four-year-olds. Those providers that serve Tier II and Tier III four-year-olds may choose to collect the family co-payment but are not required to do so.[20]

Pre-K in Baltimore Overview

Seats

Baltimore City Public Schools began making its own investments in full-day Pre-K for low-income four-year-olds in 2008 and has enrolled children from higher-income families and three-year-olds as space has allowed. KRA school readiness data have demonstrated the efficacy of this investment. The most recent results released in spring 2025 show that 52% of children attending City Schools Pre-K were assessed as demonstrating school readiness upon entry to kindergarten, compared to 31% who were in other prior care settings.

Because of its significant pre-existing commitment, City Schools entered Blueprint implementation in school year 2022-2023 with 4,480 full-day Pre-K seats in public school settings. That year, an additional 221 seats

[20] Accountability and Implementation Board: Blueprint for Maryland's Future and the Marland State Department of Education, Implementation of the PreK Mixed Delivery System, Joint Implementation Policy #3, January 2025.

were found in six community-based and private provider mixed delivery settings as funded through previous iterations of the Pre-K Expansion Grant program.

Now, two and a half school years later, there are a total of 386 mixed delivery Pre-K seats (for an increase of 165 seats in private and community-based providers since the baseline year) and 4,300 seats in City Schools. This is a net loss of 15 seats. More discussion needs to be had about the reasons behind the decrease in available seats in City Schools, which may have arisen from low enrollment in existing programs, a concern that persists even with reduced numbers (more on this below).

We estimate that mixed delivery seats currently make up 8% of the total number of publicly funded Pre-K seats (Table 25). The number of private and community-based providers participating in the mixed delivery system has doubled – from six to 12 (Table 26). No jurisdiction in Maryland is currently meeting targets for a mixed delivery system, and all have requested waivers from this requirement. Baltimore City has the third highest rate of private and community-based providers in the state, behind Worcester County (at 18%) and Carroll County (at 12%).[21]

Table 24. Changes in Publicly Funded Pre-K Seats in Baltimore City 2023–2025

School Year	2023–2024	2024–2025	Change
Baltimore City Public Schools	4,480	4,300	-180
Mixed Delivery/private and community-based providers	221	386	+165
Total	4,701	4,686	-15

Sources: Baltimore City Public Schools and the Maryland State Department of Education via a PIA request.

Table 25. Mixed Delivery Seats as a Percentage of Publicly Funded Pre-K Seats: 2024–2025 School Year

	Seats	Percentage of Total
Baltimore City Public Schools	4,300	92%
Mixed delivery/private and community-based providers	386	8%
Total	4,686	

Table 26. Mixed Delivery: Growth in Providers and Seats 2023–2025

State Fiscal Year	2023	2024	2025	Change SFY 2023–2025	
School Year	2022–2023	2023–2024	2024–2025		
Mixed delivery providers	6	9	12	+ 6	+100%
Mixed delivery seats	221	279	386	+ 165	+75%

Source: *Public Information Act Request from Project Partners to the Maryland State Department of Education, December 2024. Analysis by author.*

It is hard to imagine achieving a 50/50 split in public school and private/community-based mixed delivery Pre-K seats by the target date of the 2028-2029 school year at the current pace. The small number of

[21] Maryland State Department of Education, Blueprint Spotlight: Pre-K Mixed Delivery Implementation Update, September 24, 2024. Please note that because of differences in the way seats were counted, this report has Baltimore mixed delivery partners at 7% of all available seats in the city.

community-based and private providers who hold an EXCELS program rating of at least level 3 further limits opportunities for expanding mixed delivery.

Public Pre-K by Age

More work also needs to be done to understand the distribution of Pre-K seats by age. We do not have information on the age of Pre-K enrollees in mixed delivery sites. City Schools operates some Pre-K programs specifically for three-year-olds with special needs, though these programs are half-day. A small number of three-year-olds are also enrolled in City Schools full-day Pre-K via a waiver. Nearly all – roughly 99% – of City Schools' Pre-K seats are taken by four-year-olds.

Table 27. Estimating Availability of Public Pre-K Seats by Age: School Year 2024–2025

Type	3's	4's	Total
Public Pre-K/City Schools	(less than 100 by waiver)	4,300	4,300
Mixed Delivery	?	?	386
Total	?	4,300	4,686

Public Pre-K by Tier

The expansion of Pre-K has variously been described in the media and public discussion as "universal" and/or available to all four-year-olds.[22] The fact remains, however, that under the Blueprint, full funding for Pre-K is available for only Tier I children. As a matter of both equity and efficacy, providing opportunities to these children has long been the top priority of City Schools.

To generate an estimate of the number of Tier I eligible children in the city – and therefore how close we are to meeting the benchmark delivery date of reaching all Tier I three- and four-year-olds by the 2025-2026 school year – we return to birth records.

In Maryland, income eligibility for Medical Assistance through the Children's Health Insurance Program for pregnant women is set at or below 200% of the FPL or up to 300% of the FPL with a premium[23] – a close proxy for Tier I eligibility.

In Baltimore City, approximately 60% of all births are to mothers receiving Medical Assistance. By using the total number of births multiplied by the percentage of births to mothers receiving Medical Assistance, we generate an estimate of the number of Tier I children who were eligible to enroll in Pre-K as three- and four-year-olds in the 2024-2025 school year (Table 28).

Table 28. Medical Assistance Births in Baltimore City and Estimate of Tier I Eligible Children

Birth Year	Total Births	% of mothers receiving Medical Assistance	Est Number of Tier I children	Pre-K 4's Enrollment Year	Pre-K 3 's Enrollment Year
2020	7,412	59%	4,373	2024	
2021	7,231	58%	4,194		2024

[22] See, for example, Lora, Maya. How fast can Maryland expand Pre-K? The numbers show what's slowing it down. The Baltimore Banner, September 24, 2024; and Lora, Maya. Near-universal Pre-K is on the horizon in Maryland. Baltimore knows the challenges. The Baltimore Banner, August 29, 2024

[23] See Medical Assistance, Maryland Department of Human Services, accessed at: https://dhs.maryland.gov/weathering-tough-times/medical-assistance/#:~:text=eligible%20for%20Medicaid-,Pregnant%20women%20of%20any%20age,poverty%20level%20with%20a%20premium)

With these estimates in mind, there are currently sufficient public Pre-K seats in Baltimore for 98% of Tier I four-year-olds, but a negligible percentage of Tier I three-year-olds. Even if all 386 seats in the mixed delivery system were going to Tier I three-year olds (and we don't know that they are), coverage for three-year-olds would still be at lower than 10%.

Table 29. Baltimore City Public Pre-K Availability for Tier I Three- and Four-Year-Olds

	Three-year-olds	Four-year-olds
Tier I Children (estimate)	4,194	4,373
City Schools' full-day Pre-K seats	?	4,300
Availability	?	98%

To be clear, there is the *capacity* to serve 98% of Tier I four-year-olds within City Schools. This is far from the capacity to serve ALL four-year-olds, as has sometimes been reported. Even when accounting for the estimated number of four-year-olds who are enrolled in non-public nursery and private schools and assuming that all mixed delivery seats are going to four-year- olds (which again, we don't know that they are) there is existing Pre-K capacity for 65% of the city's total number of four-year olds.

Table 30. Estimating Total Pre-K Seats for Four-Year-Olds Citywide

Site	Total(s)
Public Pre-K (2024-2025)	3,800
Existing Pre-K Expansion Grantees (2024-2025)	386
Non-public school enrollment of four-year-olds (2023)[24]	654
Total	4,840

Table 31. Pre-K Seat Availability as a Percentage of the Total Number of Four-Year-Olds

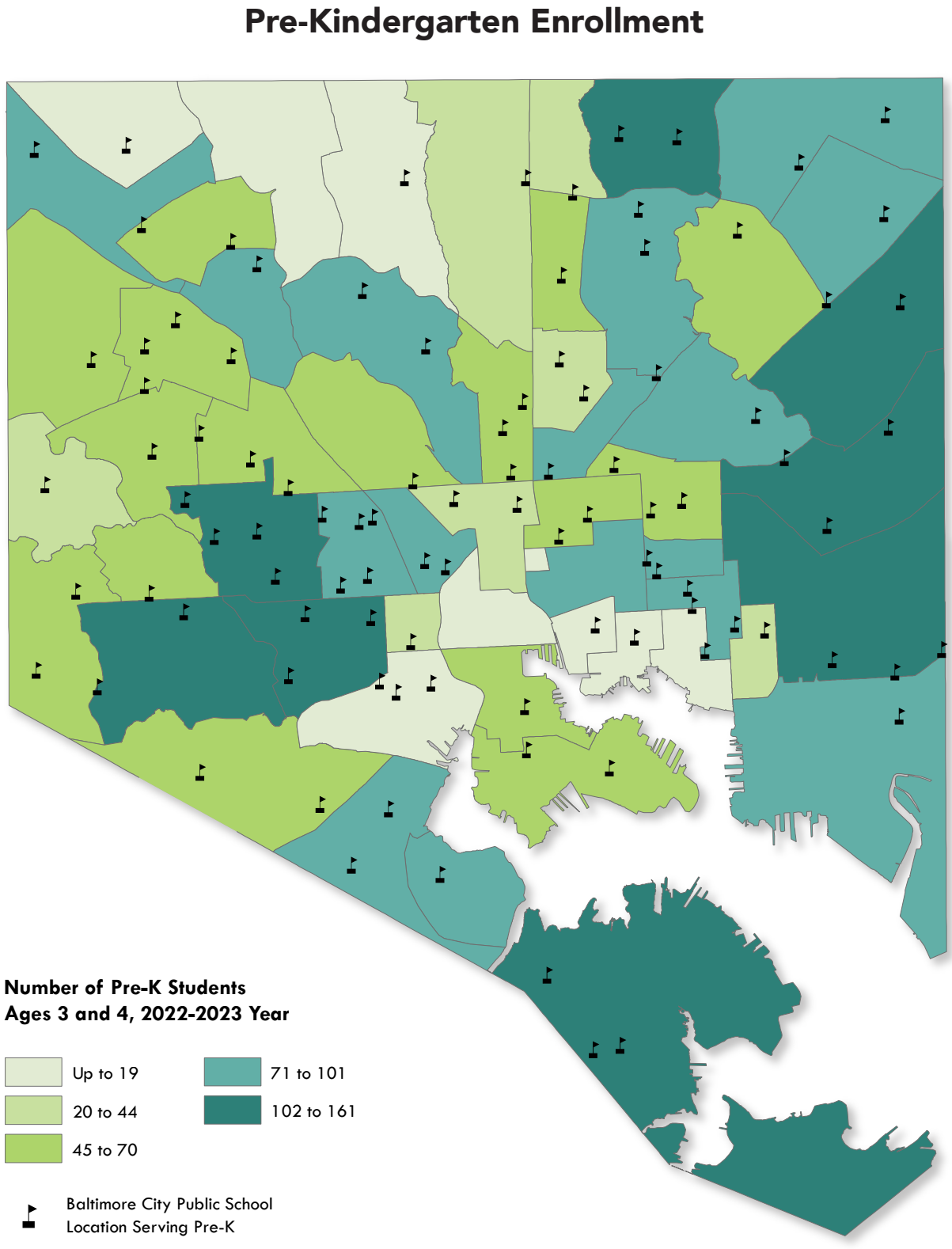
Category	Total
Baltimore City four-year-olds in the 2024–2025 (born in 2020)	7,412
Number of Seats	4,840
Coverage	65%

Enrollment

Enrollment is a different matter still. Pre-K enrollment and elementary schools offering Pre-K classrooms are displayed in Figure 16, providing a quick look at the current geography of public Pre-K enrollment and availability in Baltimore.

[24] Non-public school enrollment of 4-year-olds is for school year 2023 and is drawn from: Maryland State Department of Education, Nonpublic Schools Enrollment, 2024. Accessed at: https://www.marylandpublicschools.org/about/Documents/DCAA/SSP/20232024Student/Nonpublic-Schools-Enrollment-2024-A.pdf

Figure 16. City Schools' Pre-K Enrollment (2022–2023) by Student's Home Address with Schools Offering Pre-K



Home address of student is mapped. Natural breaks method used for data classification. Source: Baltimore City Public Schools

Paradoxically, even as City Schools and partners work to develop a plan for scaling up Pre-K for all low-income three- and four-year-olds under the Blueprint, current enrollment is lower than capacity. In the 2024-2025 school year, 86% of Pre-K seats in City Schools were filled, slightly up from 82% in school year 2022-2203 and 84% in 2023-2024.

Table 32. City Schools Pre-K Enrollment as a Percentage of Seats

	SY 2022–2023	SY 2023–2024	SY 2024–2025
Enrollment	3,654	3,780	3,683
Seats	4,480	4,480	4,300
Enrollment as a percentage of seats	82%	84%	86%
Estimated number of unfilled seats	826	700	617

Sources: *City Schools' submissions to the Blueprint Accountability and Implementation Board; City Schools enrollment data shared with BNIA – JFI; and City Schools update for current school year. Estimate of unfilled seats by author.*

There could be several reasons for the gap between Pre-K enrollment and the number of available seats:

- Overall school attendance and enrollment in Baltimore and around the country dropped off significantly during and immediately after the COVID-19 pandemic and has just begun to recover.
- There is a possible mismatch between where Pre-K seats are located and where family preferences for school location lie.
- Families – especially families where both parents work – may need coverage for the full working day. Full-day Pre-K covers 6.5 hours and before and after school care at school sites is limited for young children.
- Conversely, the school day at 6.5 hours may feel to parents to be too long for their young children.
- Families may not feel like a formal setting in a Baltimore City public school is appropriate for their young child; and/or
- Pre-K is non-compulsory. Families may not know about or appreciate the significance of the opportunity for enrollment.

This is all speculation. A concerted effort to better understand the reasons for the current gap between seats and enrollment and to ensure every available seat is filled is certainly warranted – especially as energy, attention, and excitement continue to build around expanding Pre-K in the city and as the KRA data continues to clearly indicate the significance of Pre-K to school readiness.

To fill these seats, available data suggest specific and targeted outreach to:

- Children who currently spend the year before kindergarten in home or informal care – some 800-1,000 children (Table 33).
- Children with special needs and English Language Learners, whose KRA results continue to lag their peers.
- Children from neighborhoods where poverty rates are high, but current Pre-K enrollment is relatively low (Table 34).
- Children from neighborhoods with high numbers of Tier I children (Figure 17); and
- Children from neighborhoods with high numbers of births (Figure 18).

Table 33. School Year 2023–2024 KRA Results by Prior Care Setting, Number, and Percentage of Entering Kindergarteners

Prior Care Setting	Estimated Number of Students	Percentage of Students	Percentage Assessed as Demonstrating Readiness
Family Child Care	200	4%	23%
Child Care Center	300	6%	48%
Head Start	300	6%	23%
Home/Informal Care	800	16%	17%
BCPS Pre-K	3400	68%	46%

Source: BERC Analysis of Baltimore City 2023-2024 KRA Data, Prior-Care Setting as self-reported by student's parents. Numbers rounded to the nearest 100 to protect student privacy.

Table 34. Pre-K Enrollment as a Percentage of Four-Year-Olds by CSA with Percentage of Children in Poverty > 30%

Community Statistical Area	Pre-K Enrollment (2022–2023 school year)	Average Annual Number of Births (2017–2021)	Estimated Pre-K Enrollment as a % of four-year-olds	Percent of Children Living Below the Poverty Line (2018–2022)
Poppleton/The Terraces/ Hollins Market	36	67	54%	71%
Westport/Mount Winans/ Lakeland	99	124	80%	59%
Upton/Druid Heights	80	131	61%	57%
Oldtown/Middle East	79	138	57%	55%
Sandtown–Winchester/Harlem Park	76	160	47%	54%
Cherry Hill	77	139	56%	53%
Harbor East/Little Italy	14	52	27%	46%
The Waverlies	41	83	50%	46%
Downtown/Seton Hill	17	73	23%	46%
Southwest Baltimore	115	210	55%	45%
Madison/East End	76	116	66%	45%
Belair–Edison	101	175	58%	42%
Brooklyn/Curtis Bay/Hawkins Point	141	244	58%	42%
Pimlico/Arlington/Hilltop	62	113	55%	38%
Midway/Coldstream	72	97	75%	35%
Edmondson Village	56	83	67%	35%
Oliver/Johnston Square	53	98	54%	34%
Greater Rosemont	131	213	62%	32%
Patterson Park North & East	99	282	35%	31%
Clifton–Berea	70	115	61%	30%

Figure 17. Pre-K and Percentage of Births to Mothers on Medical Assistance (as Proxy for Tier I)

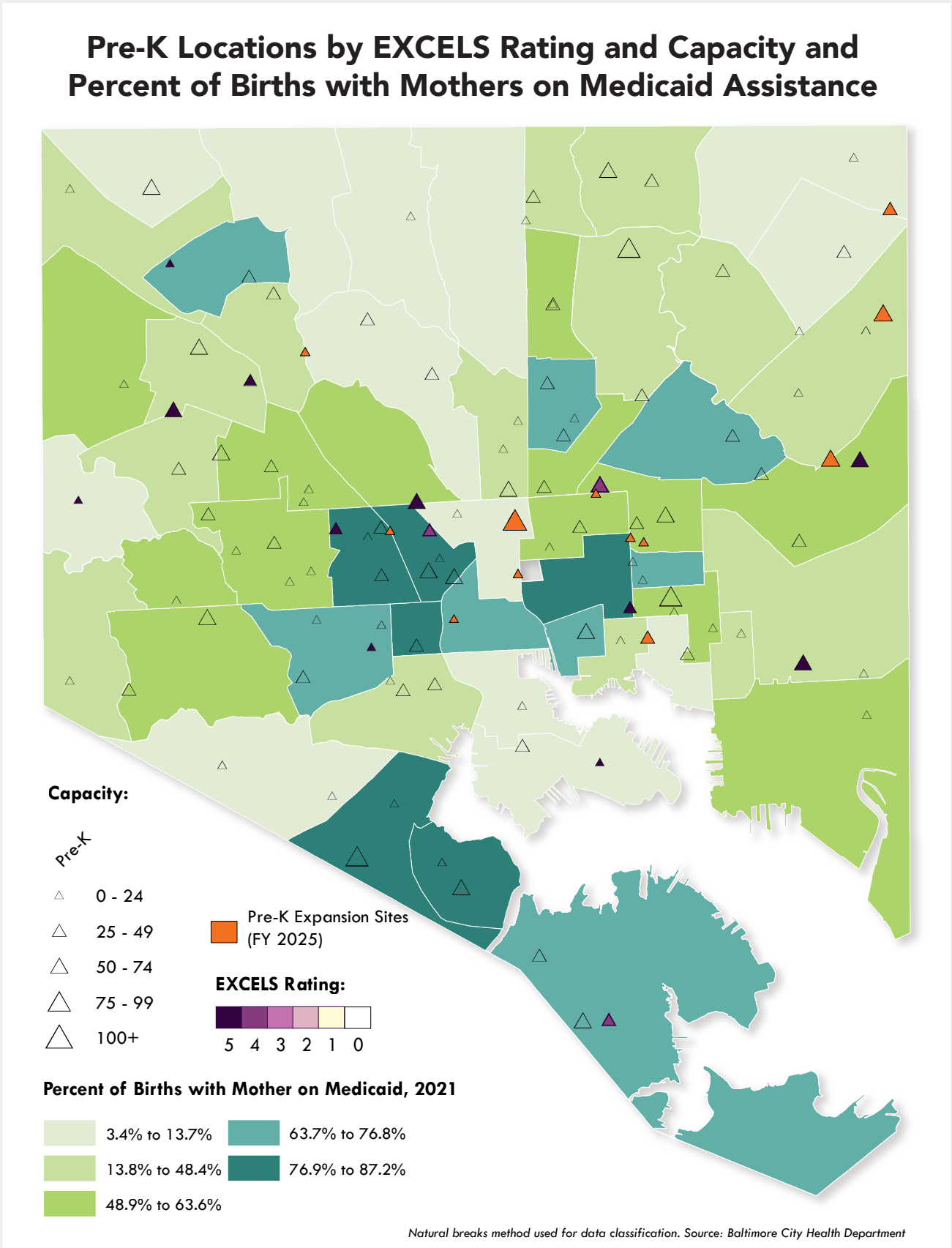
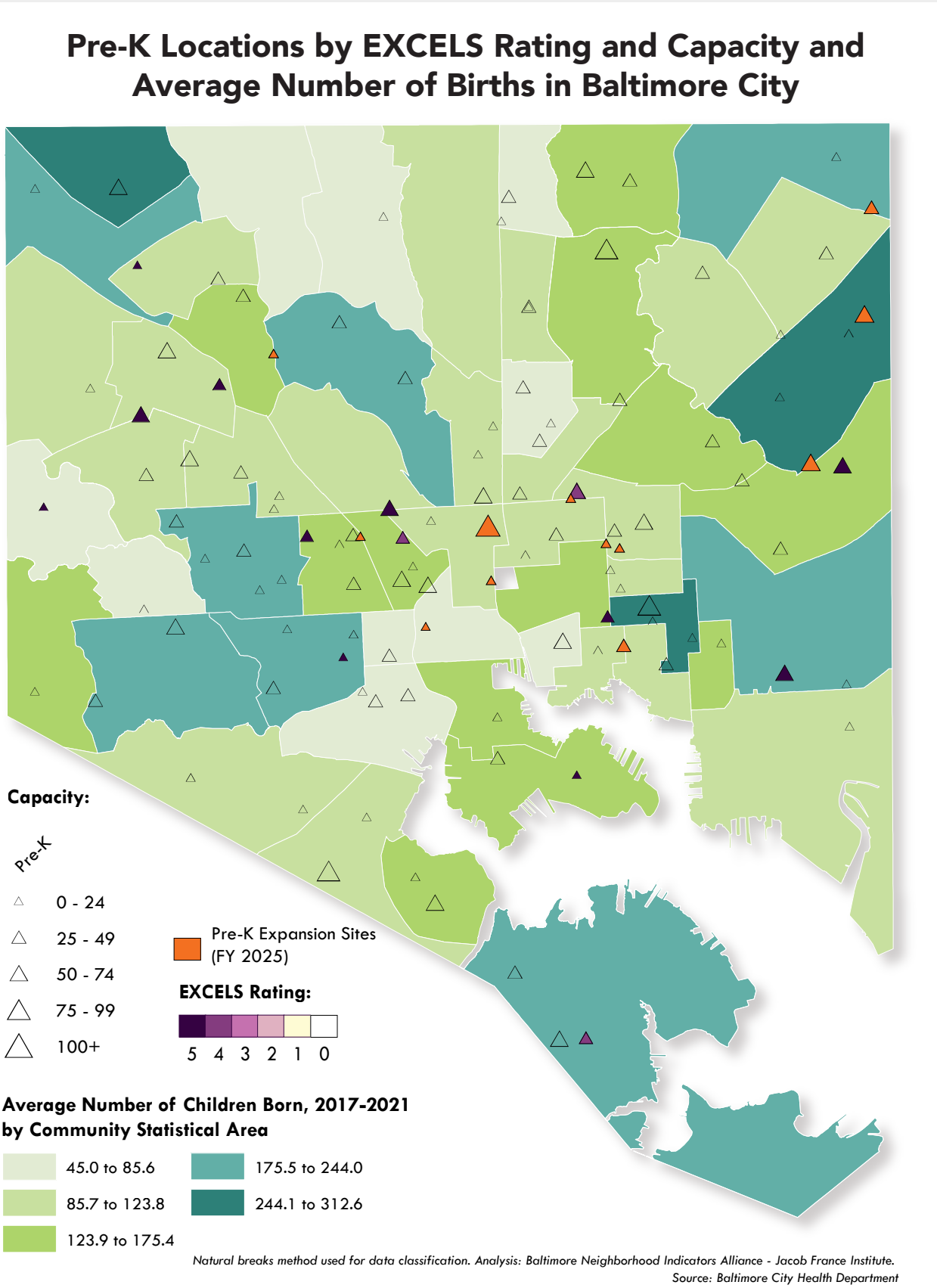


Figure 18. Pre-K Locations by EXCELS Rating and Capacity and Average Numbers of Births in Baltimore City



Natural breaks method used for data classification. Analysis: Baltimore Neighborhood Indicators Alliance - Jacob France Institute.
Source: Baltimore City Health Department

Baltimore City Blueprint Implementation Status

Blueprint Component	Goal	Blueprint Timeline/ Deliverables	Current Estimate (based on available data)
Mixed Delivery	50/50 Split in Public School and Private/ Community-based Providers	10% by 2024–2025 School Year	8% 2024–2025 School Year
		20% by 2025–2026 School Year	
		30% by 2026–2027 School Year	
		40% by 2027–2028 School Year	
		50% by 2028–2029 School Year	
Pre-K Expansion	Full day Pre-K for all Tier I three- and four-year-olds (from families with incomes at or below 300% of FPL)	100% by 2025–2026 School Year	Available to: + An estimated 65% of all four-year-olds; + 98% of Tier I four-year-olds; and + a negligible % of Tier I three-year-olds. Note: Enrollment gap of 600–800 seats, and 800+ kindergarteners with no formal Pre-K experience (in home or informal care the year prior to kindergarten).
	Expand full day Pre-K for Tier II four-year-olds on a sliding scale	2024–2025 School Year	City Schools reports that 4% of Pre-K enrollees in school year 2024–2025 are from Tier II families. 4% of 3,683 = 147 Tier II four-year-olds.[25] City Schools has thus far waived co-payments for families.

[25] Please note that we have used birth records to estimate eligibility for the number of Tier I three- and four-year-olds. We have no good working estimate of the number of Tier II children.

VI. Head Start and Early Head Start

Head Start and Early Head Start programs are free, federally funded programs designed to promote school readiness for infants, toddlers, and preschoolers from families with incomes at or below the Federal Poverty Level.[26] Head Start programs also enroll children with identified physical and developmental delays, children in foster care, and children experiencing homelessness. In addition to center-based pre-school programming for at least six hours a day, Head Start and Early Head Start programs use a variety of strategies including dedicated family support workers, family councils, and other services to support parents and caregivers and promote children's learning and development by recognizing parents as their children's primary teachers and nurturers.[27] Early Head Start programs support pregnant women and families with children younger than age three; Head Start programs serve children ages three to five.

In Baltimore, five federal grantees operate 37 separate Head Start and 11 Early Head Start sites in stand-alone centers, churches, public schools, and community centers. Two programs – Dayspring Head Start and St. Vincent de Paul Head Start – are currently partners in the mixed delivery system with state funding for public Pre-K along with federal Head Start funding. The Baltimore City Head Start Collaborative brings grantees together to discuss citywide strategies and promote coordination.

The map in Figure 19 shows Head Start and Early Head Start program locations, capacity, and EXCELS ratings as of 2024. Please note that since this map was made, an additional five Head Start programs have advanced to EXCELS level 5, most of these moving from EXCELS level 3. Please also note that Head Start and Early Head Start programs must meet extensive federal standards to receive funding.[28] These standards, and not Maryland EXCELS, serve as the primary measure of quality and effectiveness in the delivery of Head Start programs.

Members of the Head Start Collaborative provided updated data on their EXCELS ratings, capacity, and enrollment in early 2025. Updated data on EXCELS ratings are in Appendix A. Updated enrollment and capacity information are contained in the tables below.

Capacity

In the current program year, operating partners report a total capacity of 2,054 Head Start seats for three- and four-year-olds, and 300 spots for very young children from ages six weeks to 36 months in Early Head Start.[29]

Table 35. Head Start and Early Head Start Capacity as of January 2025

Head Start	
Federal Grantee	**2024–2025 Program Year Capacity**
Baltimore City Head Start	759
St. Vincent de Paul	470
Associated Catholic Charities	495
Y of Central Maryland	330
Total	2,054

[26] And in some select cases up to 130% of FPL.
[27] Head Start and Early Head Start Program descriptions largely drawn from: https://headstart.gov/programs/article/head-start-programs and were further refined by members of the Baltimore City Head Start Collaborative.
[28] Head Start Program Performance Standards, Updated August 2024 and accessed at: https://headstart.gov/sites/default/files/pdf/performance-standards-final.pdf.
[29] Capacity figures are derived from the contracted number to be served for the current contract year and provided by programs.

Early Head Start	
Federal Grantee	**2024–2025 Program Year Capacity**
Maryland Family Network	300

Enrollment

At the time of this writing, Head Start programs enroll close to 2,000 Baltimore City three- and four-year-olds; Early Head Start programs enroll almost 300 children under the age of three.

Table 36. Head Start Enrollment by Age[30]

2024–2025 Enrollment			Total Enrollment
Operator	**Three Year Olds**	**Four Year Olds**	
Baltimore City Head Start	534	202	736
St. Vincent de Paul	298	174	472
Associated Catholic Charities	240	77	317
Y of Central Maryland	241	81	322
Total	1313	534	1847

Table 37. Early Head Start Enrollment by Age

Operator	2024–2025 Enrollment	Total Enrollment	
	6 weeks to 24 months	24 months–36 months	
Maryland Family Network	125	165	290

Enrollment is at 90% of capacity for Head Start and for 97% for Early Head Start. Providers note that while they have waiting lists, challenges to full enrollment have included ongoing issues with recruiting and retaining qualified staff. Competitive salaries are a particular issue. Teachers can leave for higher salaries in public school systems, and some leave the profession for other industries or sectors.

Table 38. Enrollment as a Percent of Capacity

	Capacity	Enrollment	Enrollment as a Percentage of Capacity
Head Start	2054	1847	90%
Early Head Start	300	290	97%

[30] Enrollment figures are point-in-time as of February 21, 2025, and provided by programs.

Eligibility

Using data from the 2020 Census, BNIA-JFI estimates that some 3,345 three- and four-year-olds and 5,250 children under the age of three live in families with incomes at or below 100% of the Federal Poverty Level, making them eligible for Head Start and Early Head Start. With current enrollment as our numerator, we estimate that current Head Start and Early Head Start capacity reaches 55% of eligible three- and four-year-olds and 5% of eligible children under age three.

Table 39. Head Start and Early Enrollment as a Percent of Eligibility

Eligibility	Estimated Number Eligible	Current Number Enrolled	Enrollment as a Percentage of Eligibility
3- and 4-year-olds at or below 100% of FPL	3,345	1847	55%
Children birth to age three at or below 100% of FPL	5,250	290	5%

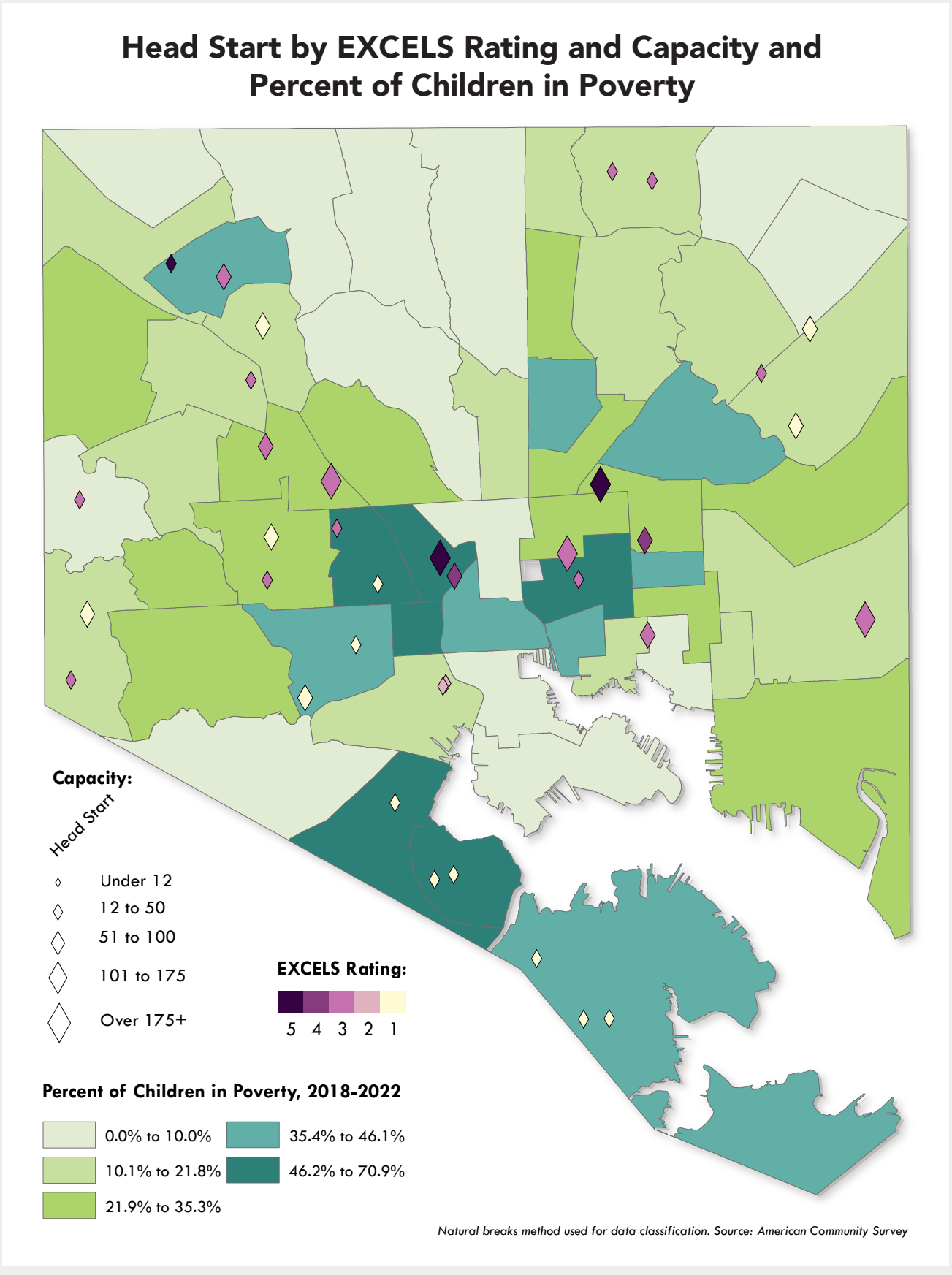
Head Start and City Schools have been working in partnership since 2008 to enroll and serve low-income three- and four-year-olds. With the new Maryland State Board of Education/Accountability and Implementation Board guidance that public school systems serve four-year-olds and community-based programs – like Head Start – serve three-year-olds through mixed delivery Pre-K, are there new opportunities for partnership? What might a greater commitment to Early Head Start for the city's youngest children look like? What role might local investment and leadership play?

Update

Since the bulk of this analysis was completed, the need for local leadership, advocacy, and investment around Head Start and Early Head Start has only been heightened. An initial draft of the proposed federal 2026 budget was released in April of 2025. According to multiple reports, the proposed budget would have zeroed out funding for Head Start and Early Head Start programs nationwide.[31] Such a move would be devastating for Baltimore, affecting some 2,300 young children directly and impeding their parents' ability to go to work or pursue further education and training. After public outcry, program funding was restored, though administrative funds have been cut, regional support offices have been closed, and considerable instability has been introduced.[32]

[31] See, for example, Head Start advocates brace for possibility of Trump eliminating funding, National Public Radio, April 18, 2025 and Schermele, Zachary, Exclusive: Trump budget proposal would fully eliminate Head Start, USA Today, April 11, 2025.
[32] Schermele, Zachary. White House reverses course on proposal to eliminate Head Start, USA Today, May 5, 2025.

Figure 19. Head Start by EXCELS Rating and Capacity as of May 2024 and Percent of Children in Poverty



VII. Summary Findings

- Driven by decreases in births to Black mothers, births in Baltimore have declined by over 16% since 2015.
- Alongside overall decreases, there are a small but growing number of Hispanic families.
- The percent of children, families, and individuals in poverty has also decreased. Yet, child poverty remains highly concentrated by race and place. Black and Brown children are much more likely than their White peers to live in poverty. Sixteen Baltimore City communities experience child poverty rates of 35% or higher. Six have child poverty rates of greater than 50%.
- Reflecting race-based disparities in opportunity, school readiness – as measured by the state's previous Kindergarten Readiness Assessment – largely mirrors the race and ethnicity of a child's family.
- That is part, but not all, of the story. Kindergarten readiness also appears highly related to prior care settings. Children whose parents report they attended a child care center or who were in City Schools' Pre-K in the year before kindergarten are much more likely to be assessed as ready for kindergarten than their peers who were in home or informal care.
- Working families cite addressing the affordability of child care as a most pressing need.
- Despite its significance to school readiness and to meeting the needs of working families, there are substantial gaps in the availability of early care and education:
    - We estimate that there are available early care and education opportunities for 50% of the city's children under age five and 20% of infants.
    - There are few regulated child care programs in areas of the city where growing numbers of Hispanic families live.
    - There are other clear gaps by geography, where early care and education is available to fewer than 50% of young children in a community.
- Evidencing what many have called a "broken system," early care and education is:
    - Unaffordable for families at or below the median income who pay more than 30% of their income for regulated care. It is even more unaffordable for families of color whose annual earnings are lower than the city average.
    - Of uncertain quality overall, with few providers in Baltimore rating at Maryland EXCELS level 3 or above.
    - Staffed and led by dedicated employees with low wages who face financial pressures of their own.
- There are declining numbers of providers and seats and rising costs for early care and education post-pandemic.
- Because of City Schools' pre-existing commitment to Pre-K, Baltimore is meeting Blueprint *capacity* goals for low-income four-year-olds; but not yet for three-year-olds. We estimate Pre-K availability for 98% of low-income four-year-olds, but only 65% of *all* four-year-olds. Few seats have been added in public schools or in community-based and private providers over the last two years. With the intent of creating a mixed delivery system, the state's goal remains a 50/50 split between public schools and community-based and private providers. Though outpacing most other school districts in the state, mixed delivery seats in Baltimore currently make up 8% of total seats. Pre-K enrollment is below capacity in City Schools.

- Baltimore City Head Start and Early Head Start programs continue to serve children from families and communities who experience poverty. There are available spots for an estimated 55% of eligible three- and four-year-olds, but only 5% of eligible children under age three. Programs are experiencing challenges related to attracting and retaining quality staff that in turn affect their ability to operate classrooms and enroll children. A strengthened partnership with City Schools alongside Pre-K expansion may provide an opportunity to reach more children. Given the instability introduced by changing federal funding and policy priorities, leadership and advocacy are required to maintain these programs and the critical support they provide to the city's children and families.

VIII. Obstacles and Opportunities

Lack of access to and the high costs of regulated early care and education hamper the ability of parents with young children to participate in the workforce and affect school readiness. For the most part, the circumstances of families continue to dictate early childhood outcomes, including school readiness.

There are significant bright spots, however:

- When young children – no matter their family's economic status – have access to high-quality early care and education, school readiness improves. Children whose parents report they attended a child care center or were enrolled in City Schools' Pre-K far outpace their peers who did not participate in formal early care and education.
- Maryland has made significant investments in the Child Care Scholarship Program, doubling the number of families and children who receive financial support for child care in Baltimore City; and
- While progress has been slow and real challenges to implementation of a mixed delivery system have emerged, Maryland remains committed to expanding public Pre-K.

Should they be sustained, these public commitments to the Child Care Scholarship and Pre-K expansion can provide the initial building blocks for a universal system of early care and education, though we are far from such a system now, particularly when it comes to children under three. Progress is threatened by continuing projected state budget shortfalls and funding cuts by the federal government.

As real and intense as these pressures are, now is the time to fully commit to a universal system of early care and education for the city's children from birth to age five and to invest accordingly. Public funds may be tight in the city and state and federal funding uncertain, but Baltimore and Maryland are not without resources. We must fight to sustain and increase federal, state, and local funding commitments. Public investments can and should be matched by philanthropy and business as evidence of a deeper commitment to working parents, children's school readiness, and ensuring more Baltimore City families have a path to prosperity.

Stakeholders and policy makers should also work together to:

- Maximize enrollment in publicly funded programs by better understanding the reasons behind the gap between current enrollment and available seats and designing a targeted outreach campaign to children not currently enrolled in formal early care and education, English Language Learners, and children with special needs.
- Address questions about the effectiveness and reach of the Maryland EXCELS quality rating and improvement system and – as it remains the standard for the allocation of public resources in Maryland – implement effective approaches to enlist more providers and support them in moving up in the ratings.
- Renew a commitment to mixed delivery and to expanding Pre-K for all low-income three-year-olds and all four-year-olds and accelerate progress towards this goal.
- Improve pay and advancement opportunities so all early care and education professionals are well compensated, well supported, and sufficiently appreciated no matter where they carry out their important work.

Finally, securing data and information for this analysis has been surprisingly difficult. For example, slowdowns during and since the pandemic have affected the timeliness and public release of birth data (the underlying information for our estimates). Data are kept through Maryland LOCATE about the capacity of center- and family-based child care programs, but there is no system for capturing actual enrollment or enrollment by child's age. We have identified several discrepancies between the data contained in LOCATE and that

reported by programs, potentially due to a lag between program changes and system updates. Though partners have been forthcoming, there is no single repository of Head Start and Early Head Start data for programs operating in the city. And we are all reliant on parents' self-reporting to understand the prior care setting of entering kindergarteners. A greater commitment to regular, transparent, and comprehensive data collection and reporting is a basic requirement for future action and accountability.

Summary of Recommendations and Opportunities for Action

Recommendation	Who Can Act?	Action Opportunity
Commit to building a universal system of high-quality early care and education for all Baltimore children from birth to age five	Parents, providers, policy makers, funders, and all those dedicated to the city's future growth and prosperity	Make this a priority goal for collective action and accountability
Sustain existing federal, state, and local commitments	Maryland's Congressional representatives	Maintain federal funding for Head Start, Early Head Start, and the Child Care Development Fund
	Maryland's Governor and General Assembly	Maintain current funding levels for the Maryland Child Care Scholarship and the Pre-K Expansion provisions of the Blueprint for Maryland's Future
Maximize enrollment in publicly funded programs	City Schools and partners	Analyze the current gap between enrollment and available seats Design and implement a targeted outreach campaign to children not currently enrolled in formal early care and education, English Language Learners, and children with special needs
Increase investments	Maryland's Governor and General Assembly	Fully fund Pre-K expansion to all four-year-olds and to low-income three-year-olds Identify and implement a sustaining funding mechanism for the Child Care Scholarship
	Baltimore Mayor and City Council	Provide local funding to expand child care availability to infants and toddlers and underserved areas of the city, improve affordability for families, and increase the wages of caregivers
	Local Philanthropy	Increase investments in the capacity of early care and education providers to reach more infants and toddlers and underserved areas of the city, raise wages, participate and advance in Maryland EXCELS, and serve as mixed delivery sites for Pre-K expansion

Recommendation	Who Can Act?	Action Opportunity
	Employers	Offer a child care benefit to working parents
Increase provider participation in mixed delivery and Maryland EXCELS	Maryland State Department of Education and Partners	Identify and address roadblocks to provider participation and advancement Maintain state funding for the Child Care Credential Program that incentivizes teacher training and professional development
Improve data collection, reporting, and availability	Maryland State Department of Education and Partners	Improve the accuracy of the LOCATE Data System through regular updates on program location, capacity, and EXCELS ratings Develop a mechanism, through LOCATE or elsewhere, to capture enrollment in child care programs by children's age Establish a unique identifier for children participating in early care and education programs to better track enrollment and school readiness outcomes in public and private early care and education settings Provide clear data on population projections for children through age 5, existing Pre-K enrollment in public and mixed delivery settings by age and family income, and school readiness results by prior care setting to inform local action and accountability around Pre-K expansion

"We have both the responsibility and the opportunity to define what happens with our city during this era. It will be hard – there will be tough choices to make and bullies that we must stand united against – but I know that we are up to the task. Tenacity and grit is what defines us as a city – and we need it now more than ever. We have the opportunity here to show the world what is possible when neighbors come together to redefine their city and shape its future for the better."

— Mayor Brandon Scott, Inauguration for Second Term, December 3, 2024

Appendix A: Additional Data on Baltimore Births, Demographics, Enrollment, and Early Care and Education

Table A-1. Baltimore Education Research Consortium: Birth, Pre-K, and Kindergarten Enrollment: Actuals and Projections through 2026

Birth Year	School Year	Actual Births	Birth Forecast (0.8% decrease yearly)	Actual City Schools PreK Enrollment	Actual City Schools K Enrollment	Enrollment Forecast (75% historical high)	Enrollment Forecast (60% historical low)	Enrollment Forecast (69% historical average)
1996	2002	9752	-	3280	6192	7314	5851	6729
1997	2003	9262	-	3240	5956	6947	5557	6391
1998	2004	9624	-	3379	5729	7218	5774	6641
1999	2005	9734	-	3232	5884	7301	5840	6716
2000	2006	9641	-	3414	5797	7231	5785	6652
2001	2007	9100	-	3642	6124	6825	5460	6279
2002	2008	9046	-	3999	6353	6785	5428	6242
2003	2009	9057	-	4712	6420	6793	5434	6249
2004	2010	9183	-	4874	6722	6887	5510	6336
2005	2011	9179	-	4852	7064	6884	5507	6334
2006	2012	9757	-	4890	7271	7318	5854	6732
2007	2013	9875	-	4763	7349	7406	5925	6814
2008	2014	9911	-	4811	7304	7433	5947	6839
2009	2015	9504	-	4691	6729	7128	5702	6558
2010	2016	8945	-	4488	6549	6709	5367	6172
2011	2017	8878	-	4411	6207	6659	5327	6126
2012	2018	9108	-	4337	6203	6831	5465	6285
2013	2019	8812	-	4394	5980	6609	5287	6080
2014	2020	8863	-	2816	5635	6647	5318	6115
2015	2021	8658	-	3072	5996	6494	5195	5974
2016	2022	8526	-	4030	6044	6395	5116	5883
2017	2023	7936	-	3987	5936	5952	4762	5476
2018	2024	7680	-	-	-	5760	4608	5299
2019	2025	7720	-	-	-	5790	4632	5327
2020	2026	7412	-	-	-	5559	4447	5114
2021	2027	7231	-	-	-	5423	4339	4989
2022	2028	-	7612	-	-	5709	4567	5252
2023	2029	-	7530	-	-	5648	4518	5196
2024	2030	-	7447	-	-	5585	4468	5138
2025	2031	-	7365	-	-	5524	4419	5082
2026	2032	-	7283	-	-	5462	4370	5025
2027	2033	-	7200	-	-	5400	4320	4968
2028	2034	-	7118	-	-	5338	4271	4911
2029	2035	-	7036	-	-	5277	4222	4855
2030	2036	-	6954	-	-	5216	4172	4798

Table A-2. Average Annual Number of Births by Community Statistical Area (Highest to Lowest)

Community Statistical Area (2020)	Average Annual Number of Births (2017-2021)
Cross-Country/Cheswolde	313
Patterson Park North & East	282
Cedonia/Frankford	276
Brooklyn/Curtis Bay/Hawkins Point	244
Hampden/Remington	222
Greektown/Bayview	218
Greater Rosemont	213
Southwest Baltimore	210
Hamilton Hills	202
Glen-Fallstaff	199
Allendale/Irvington/S. Hilton	185
Belair-Edison	175
Sandtown-Winchester/Harlem Park	160
Highlandtown	157
Southern Park Heights	156
Loch Raven	152
Beechfield/Ten Hills/West Hills	150
Inner Harbor/Federal Hill	147
Cherry Hill	139
Oldtown/Middle East	138
South Baltimore	137
Northwood	133
Orchard Ridge/Armistead	131
Upton/Druid Heights	131
Westport/Mount Winans/Lakeland	124
Canton	123
Hamilton	122
Greater Lauraville	121
Fells Point	120
Greater Charles Village/Barclay	116
Madison/East End	116
Forest Park/Walbrook	116
Clifton-Berea	115

Community Statistical Area (2020)	Average Annual Number of Births (2017-2021)
Southeastern	114
Pimlico/Arlington/Hilltop	113
North Baltimore/Guilford/Homeland	113
Greater Govans	110
Morrell Park/Violetville	110
Penn North/Reservoir Hill	103
Dorchester/Ashburton	101
Midtown	101
Howard Park/West Arlington	98
Oliver/Johnston Square	98
Midway/Coldstream	97
Greater Mondawmin	94
Chinquapin Park/Belvedere	86
Edmondson Village	83
The Waverlies	83
Downtown/Seton Hill	73
Poppleton/The Terraces/Hollins Market	67
Pigtown/Carroll Park	66
Dickeyville/Franklintown	59
Harbor East/Little Italy	52
Mount Washington/Coldspring	50
Greater Roland Park/Poplar Hill	45

Table A-3. Percent of Children in Poverty by Community Statistical Area (Highest to Lowest) with Average Annual Number of Births

Community Statistical Area (2020)	Average Annual Number of Births (2017-2021)	Percent of Children Under 18 Living Below the Poverty Line (2018-2022)
Poppleton/The Terraces/Hollins Market	67	71%
Westport/Mount Winans/Lakeland	124	59%
Upton/Druid Heights	131	57%
Oldtown/Middle East	138	55%
Sandtown-Winchester/Harlem Park	160	54%
Cherry Hill	139	53%
Harbor East/Little Italy	52	46%
The Waverlies	83	46%
Downtown/Seton Hill	73	46%
Southwest Baltimore	210	45%
Madison/East End	116	45%
Belair-Edison	175	42%
Brooklyn/Curtis Bay/Hawkins Point	244	42%
Pimlico/Arlington/Hilltop	113	38%
Midway/Coldstream	97	35%
Edmondson Village	83	35%
Oliver/Johnston Square	98	34%
Greater Rosemont	213	32%
Patterson Park North & East	282	31%
Clifton-Berea	115	30%
Orchard Ridge/Armistead	131	29%
Greater Govans	110	29%
Howard Park/West Arlington	98	28%
Penn North/Reservoir Hill	103	28%
Southeastern	114	28%
Allendale/Irvington/S. Hilton	185	26%
Greater Mondawmin	94	25%
Greektown/Bayview	218	22%
Beechfield/Ten Hills/West Hills	150	21%
Greater Charles Village/Barclay	116	20%

Community Statistical Area (2020)	Average Annual Number of Births (2017-2021)	Percent of Children Under 18 Living Below the Poverty Line (2018-2022)
Cedonia/Frankford	276	19%
Northwood	133	19%
Glen-Fallstaff	199	17%
Pigtown/Carroll Park	66	17%
Southern Park Heights	156	17%
Fells Point	120	17%
Dorchester/Ashburton	101	17%
Highlandtown	157	16%
Greater Lauraville	121	14%
Chinquapin Park/Belvedere	86	14%
Loch Raven	152	12%
Forest Park/Walbrook	116	12%
Dickeyville/Franklintown	59	10%
Morrell Park/Violetville	110	8%
Midtown	101	5%
Hamilton Hills	202	5%
Hamilton	122	5%
Cross-Country/Cheswolde	313	4%
North Baltimore/Guilford/Homeland	113	3%
South Baltimore	137	3%
Hampden/Remington	222	3%
Greater Roland Park/Poplar Hill	45	2%
Mount Washington/Coldspring	50	2%
Inner Harbor/Federal Hill	147	1%
Canton	123	0%

Table A-4. Early Care and Education Coverage Estimate by Community Statistical Area (Ranked Lowest to Highest in Estimated Coverage)

Community Statistical Area (2020)	Sum of Child Care Center Capacity	Average Annual Number of Births (2017-2021)	Births x 5	Coverage Estimate
Morrell Park/Violetville	56	110	549	10%
Penn North/Reservoir Hill	91	103	515	18%
Forest Park/Walbrook	124	116	578	21%
Brooklyn/Curtis Bay/Hawkins Point	279	244	1220	23%
Cross-Country/Cheswolde	401	313	1563	26%
Canton	164	123	613	27%
Inner Harbor/Federal Hill	203	147	737	28%
Greater Lauraville	169	121	605	28%
Westport/Mount Winans/Lakeland	177	124	619	29%
Midway/Coldstream	140	97	483	29%
Oldtown/Middle East	208	138	692	30%
Patterson Park North & East	424	282	1410	30%
Greektown/Bayview	352	218	1089	32%
Southeastern	192	114	571	34%
Chinquapin Park/Belvedere	156	86	428	36%
Southern Park Heights	292	156	778	38%
Hampden/Remington	439	222	1108	40%
Highlandtown	317	157	783	40%
Beechfield/Ten Hills/West Hills	316	150	752	42%
Greater Charles Village/Barclay	249	116	581	43%
Cherry Hill	303	139	693	44%
Edmondson Village	182	83	415	44%
Southwest Baltimore	469	210	1049	45%
Northwood	308	133	664	46%
Pigtown/Carroll Park	156	66	331	47%
Belair-Edison	419	175	877	48%
Glen-Fallstaff	479	199	993	48%
Madison/East End	282	116	580	49%
Fells Point	299	120	600	50%

Community Statistical Area (2020)	Sum of Child Care Center Capacity	Average Annual Number of Births (2017-2021)	Births x 5	Coverage Estimate
Greater Govans	294	110	551	53%
Greater Rosemont	570	213	1063	54%
Orchard Ridge/Armistead	365	131	655	56%
Sandtown-Winchester/Harlem Park	468	160	802	58%
Allendale/Irvington/S. Hilton	554	185	925	60%
Hamilton	376	122	612	61%
Hamilton Hills	620	202	1009	61%
Downtown/Seton Hill	234	73	365	64%
Dickeyville/Franklintown	194	59	294	66%
Oliver/Johnston Square	332	98	488	68%
Dorchester/Ashburton	348	101	506	69%
Pimlico/Arlington/Hilltop	390	113	567	69%
Cedonia/Frankford	1001	276	1379	73%
Poppleton/The Terraces/Hollins Market	261	67	333	78%
Upton/Druid Heights	544	131	653	83%
Midtown	424	101	506	84%
Howard Park/West Arlington	421	98	488	86%
The Waverlies	381	83	414	92%
South Baltimore	641	137	684	94%
Loch Raven	740	152	758	98%
Mount Washington/Coldspring	244	50	249	98%
Harbor East/Little Italy	267	52	258	103%
Clifton-Berea	634	115	575	110%
Greater Mondawmin	661	94	469	141%
North Baltimore/Guilford/Homeland	923	113	563	164%
Greater Roland Park/Poplar Hill	678	45	225	301%

Table A-5. Pre-K Enrollment as a Percentage of Four-Year-Olds in Community Statistical Areas Where the Percentage of Children in Poverty is Greater than 30% (Ranked by Percent in Poverty)

Community Statistical Area (2020)	Pre-K Enrollment (2022-2023 SY)	Average Annual Number of Births (2017-2021)	Estimated Pre-k Enrollment as a % of 4's	Percent of Children Living Below the Poverty Line (2018-2022)
Poppleton/The Terraces/Hollins Market	36	67	54%	71%
Westport/Mount Winans/Lakeland	99	124	80%	59%
Upton/Druid Heights	80	131	61%	57%
Oldtown/Middle East	79	138	57%	55%
Sandtown-Winchester/Harlem Park	76	160	47%	54%
Cherry Hill	77	139	56%	53%
Harbor East/Little Italy	14	52	27%	46%
The Waverlies	41	83	50%	46%
Downtown/Seton Hill	17	73	23%	46%
Southwest Baltimore	115	210	55%	45%
Madison/East End	76	116	66%	45%
Belair-Edison	101	175	58%	42%
Brooklyn/Curtis Bay/Hawkins Point	141	244	58%	42%
Pimlico/Arlington/Hilltop	62	113	55%	38%
Midway/Coldstream	72	97	75%	35%
Edmondson Village	56	83	67%	35%
Oliver/Johnston Square	53	98	54%	34%
Greater Rosemont	131	213	62%	32%
Patterson Park North & East	99	282	35%	31%
Clifton-Berea	70	115	61%	30%

Table A-6. Head Start and Early Head Start Programs by EXCELS Level as of March 2025

Head Start Programs

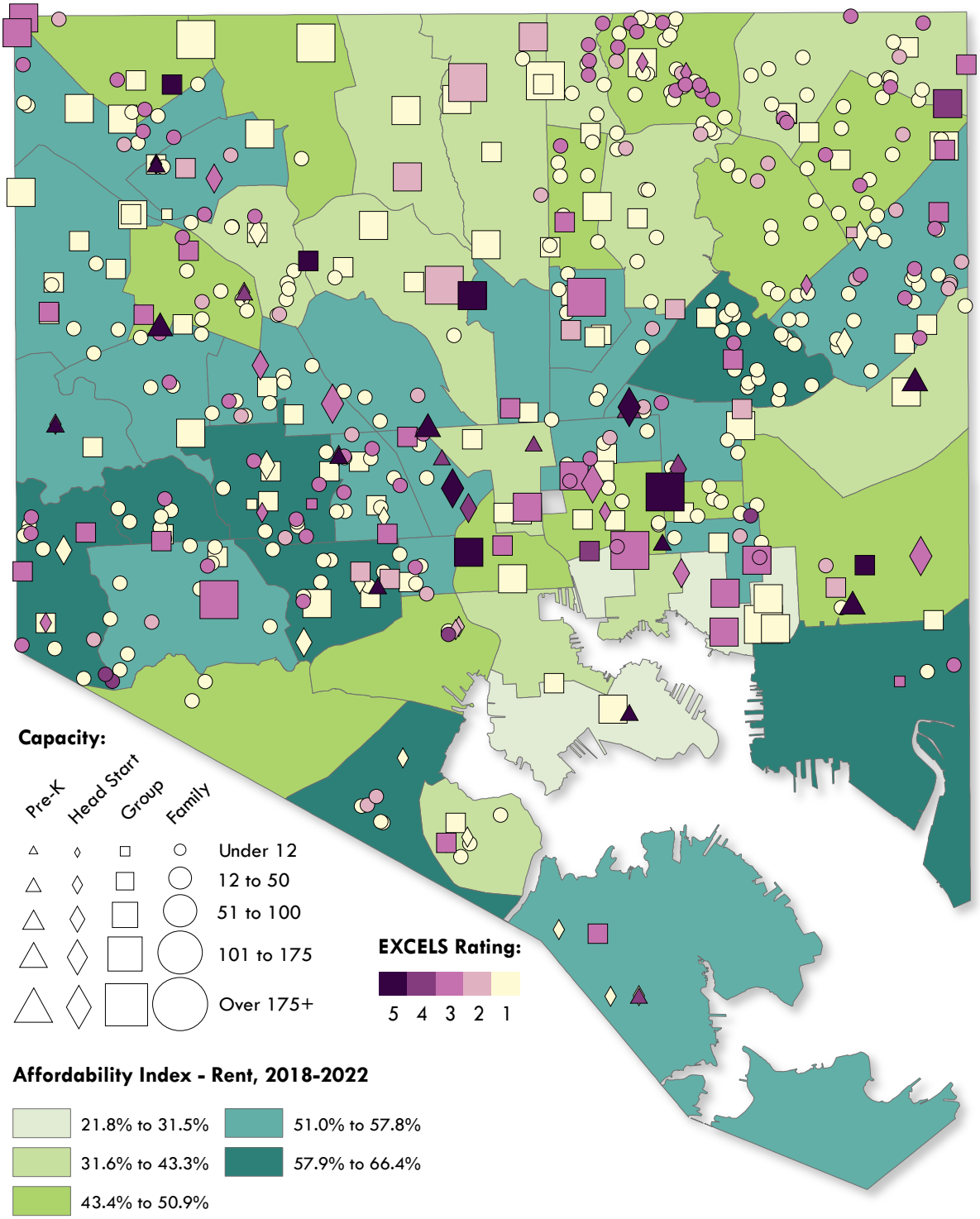
EXCELS Level		
	Number of Programs	% of Programs
Level 1	14	38%
Level 2	2	5%
Level 3	8	22%
Level 4	1	3%
Level 5	8	22%
No published level	4	11%
Total	37	

Early Head Start Programs

EXCELS Level		
	Number of Programs	% of Programs
Level 1	7	64%
Level 2	2	18%
Level 3	1	9%
Level 4	0	
Level 5	1	9%
No published level	0	
Total	11	

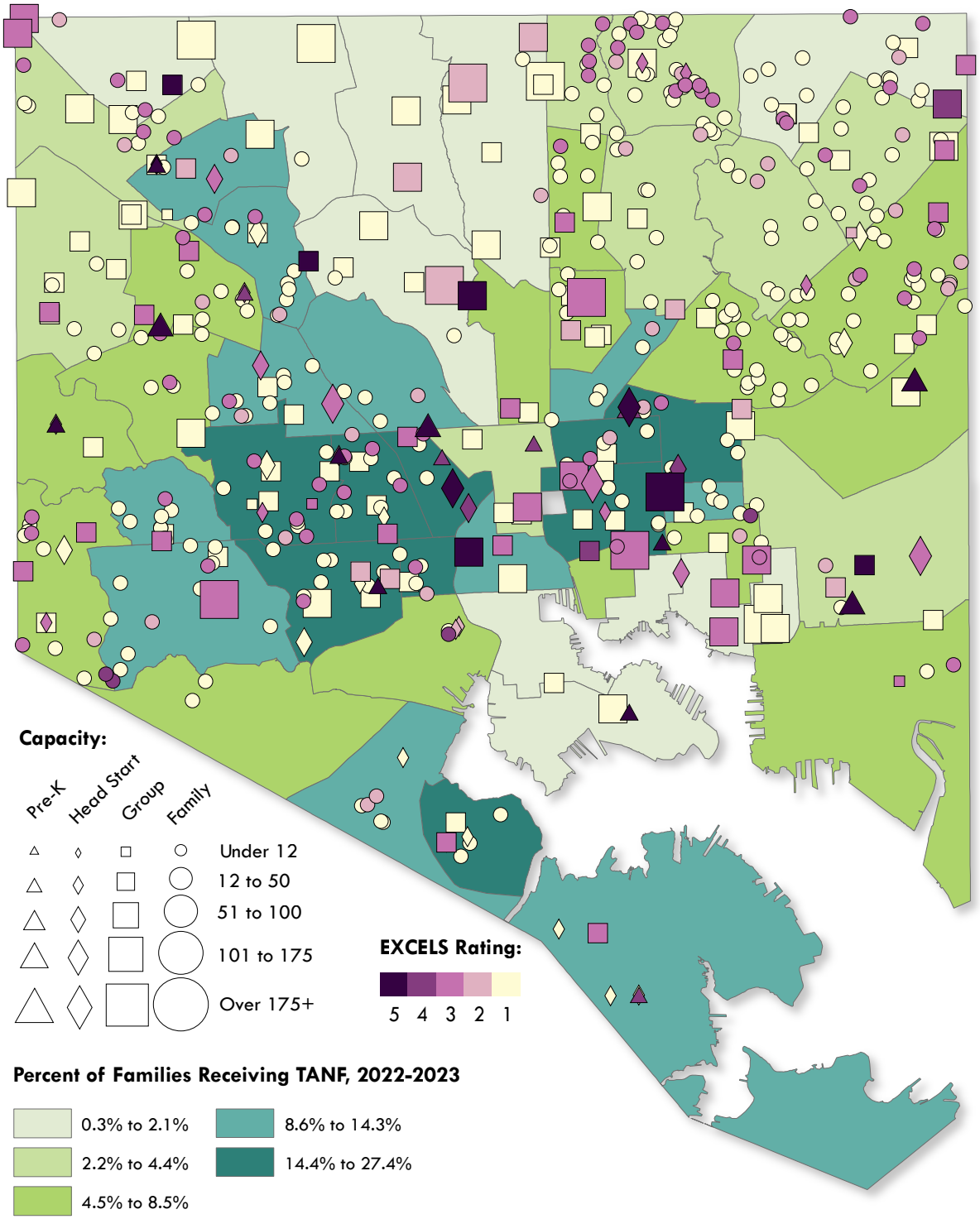
Appendix B: Additional Geographic Analyses of Early Care and Education

Figure B-1. Early Care and Education by EXCELS Rating and Capacity and Percent of Renters Paying >30% of Income on Housing Costs



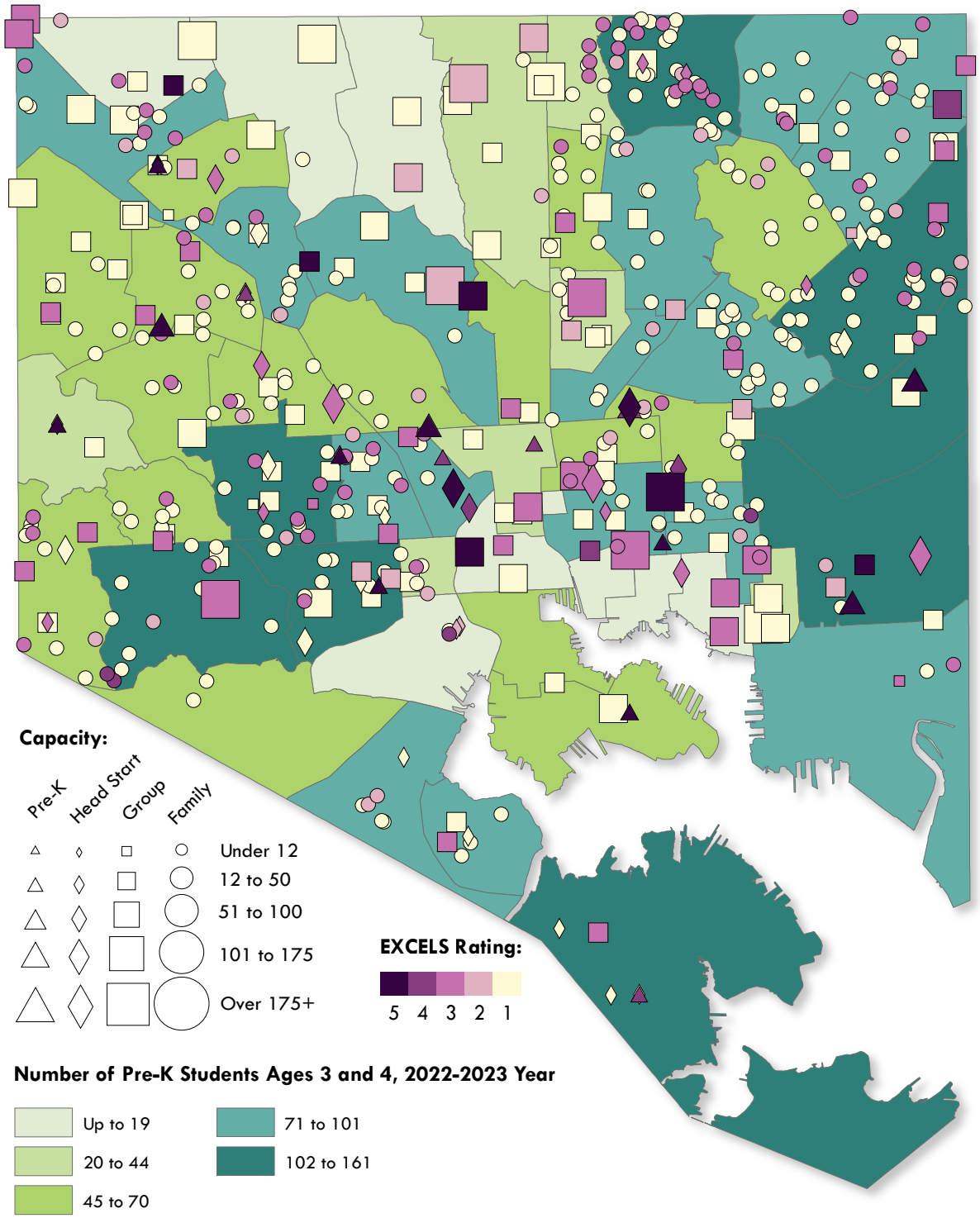
Natural breaks method used for data classification. Source: American Community Survey

Figure B-2. Early Care and Education by EXCELS Rating and Capacity and Percent of Families Receiving TANF



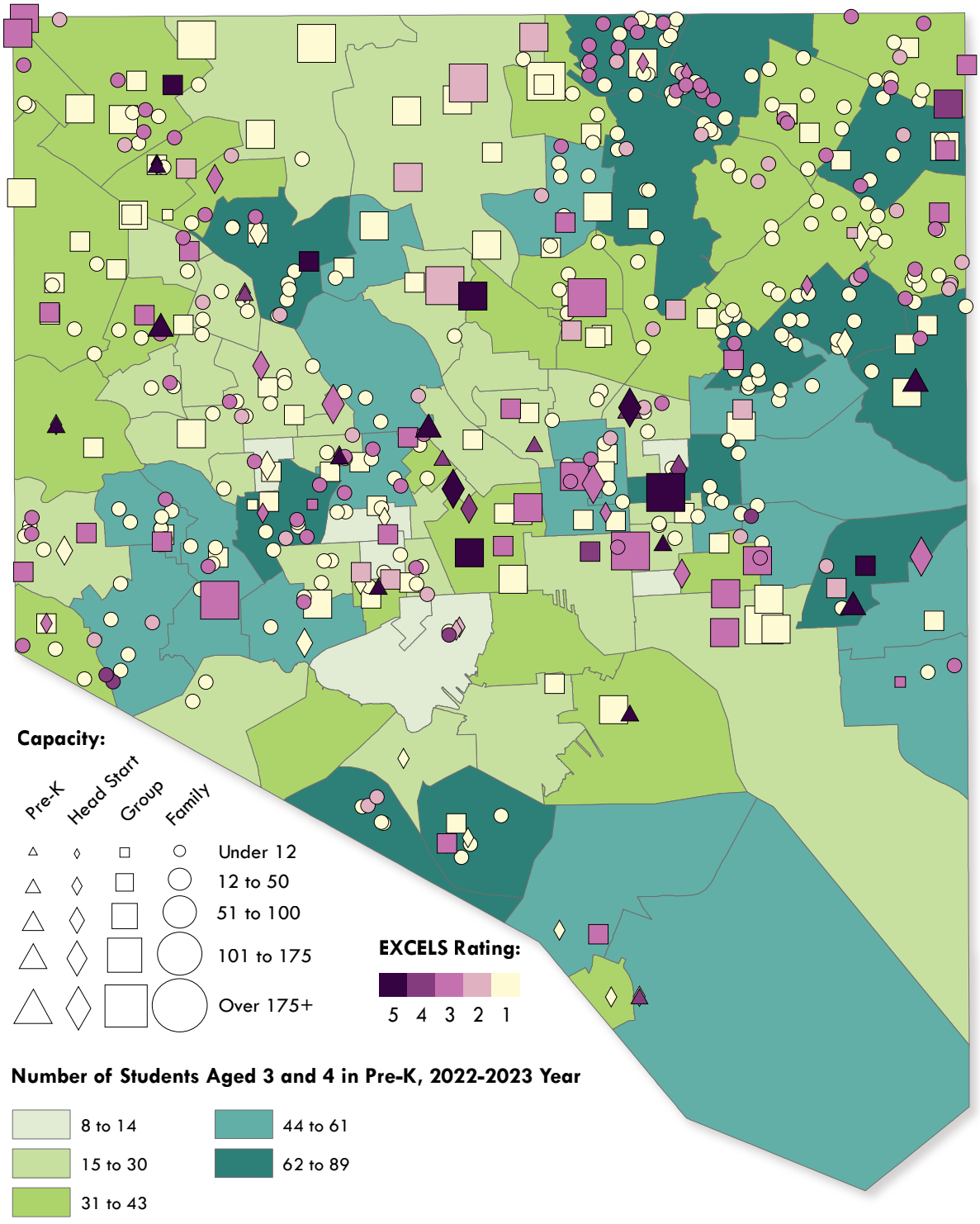
Natural breaks method used for data classification. Source: Maryland Department of Human Services

Figure B-3. Early Care and Education by EXCELS Rating and Capacity and Pre-Kindergarten Enrollment



Home address of student is mapped. Natural breaks method used for data classification. Source: Baltimore City Public Schools

Figure B-4. Early Care and Education by EXCELS Rating and Capacity and Pre-Kindergarten Enrollment by School Zone



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