

COMMUNITY NEEDS ASSESSMENT 2024



PREPARED FOR
Early Learning Coalition
of Northwest Florida

PREPARED BY
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Acronyms/Abbreviations

ACF	Administration for Children and Families
ALICE	Asset Limited, Income Constrained, Employed
ARPA	American Rescue Plan Act
CCR&R	Child Care Resource & Referral
DCF	Department of Children and Families
ECE	Early Childhood Education
ELC	Early Learning Coalition
ELCNWF	Early Learning Coalition of Northwest Florida
FAST	Florida Assessment of Student Thinking
FCC	Family Childcare
FLDOE	Florida Department of Education (FLDOE)
FPL	Federal Poverty Line
IDEA	Individuals with Disabilities Education Act
NAEYC	National Association for the Education of Young Children
NWF	Northwest Florida
SMI	State Median Index
SR	School Readiness
USDA	United States Department of Agriculture
VPK	Voluntary Pre- Kindergarten

Executive Summary

The Early Learning Coalition of Northwest Florida (ELCNWF) plays a vital role in shaping the future of young children and families in the region and recognizing the importance of understanding the diverse needs and challenges faced by the community. The organization embarked on a comprehensive community needs assessment from March to June 2024. This assessment aimed to gather insights, experiences, and perspectives from a wide range of stakeholders, including families, early learning providers, community leaders, and policymakers across the seven-county region of Bay, Calhoun, Franklin, Gulf, Holmes, Jackson, and Washington counties.

To ensure a thorough and inclusive approach, the ELCNWF employed a mixed-methods strategy, engaging over 550 participants through surveys, focus groups, and interviews. This multi-faceted approach allowed for the collection of both quantitative and qualitative data, providing a rich and nuanced understanding of the early learning landscape in Northwest Florida. By involving a diverse array of stakeholders, the assessment captured the unique challenges, strengths, and opportunities present in each county, as well as the overarching themes that emerged across the region. **The assessment revealed a need for holistic support for families, extending beyond childcare to include mental health services, parenting education, and connections to essential resources to meet basic needs.**

Childcare affordability, accessibility, and quality emerged as significant concerns for families in the region, particularly for those with infants, toddlers, and children with special needs. The cost of care often surpasses what many working families can afford without subsidies, and the availability of affordable childcare, access to quality pre-kindergarten, and finding quality childcare were among the top concerns for parents. Childcare arrangements varied significantly across counties, with a mix of formal and informal care being utilized based on availability, affordability, and local preferences. **Families in Northwest Florida face substantial challenges in accessing affordable, high-quality childcare, especially for vulnerable populations.**

Kindergarten readiness was identified as a top priority for the community, with data from Fall 2023 showing that 62 percent of VPK completers scored “ready for kindergarten” compared to only 37 percent of non-VPK students. The assessment highlighted the importance of expanded access to high-quality preschool programs and active family engagement in ensuring children's school success. While most parents felt confident in supporting their child's learning and development, there was room for improvement in resource awareness and accessibility, especially for infant and toddler parents. **Increasing access to quality early learning programs and supporting families in the transition to kindergarten are crucial for promoting school readiness.**

Childcare providers in Northwest Florida reported substantial workforce and financial challenges, exacerbated by the lingering effects of Hurricane Michael and the COVID-19 pandemic. Providers cited current reimbursement rates and staffing shortages as critical issues, leading to waitlists, empty slots, and disruptions in care continuity for children. The expiration of emergency funding has left providers vulnerable, highlighting the need for sustainable solutions. **Childcare providers are grappling with significant operational and financial hurdles, underscoring the need for increased support and systemic changes.**

The early learning workforce in the region experiences low compensation, high turnover rates, and significant stress, with recruiting and retaining qualified staff being a primary challenge for childcare providers. Early childhood educators reported low pay, lack of opportunities, and the need for additional support as major obstacles, with the demanding nature of their work and the cost and time required for continuing education contributing to compassion fatigue, secondary trauma, and burnout. **The early learning workforce faces numerous challenges that impact their well-being and the quality of care they provide, necessitating targeted support and investments.**

Continued recovery from recent hurricanes and the COVID-19 pandemic remains an ongoing need that impacts children, families, and providers in Northwest Florida. The assessment highlighted the lasting impact of these crises on the childcare infrastructure, with many facilities still in need of repairs and renovations. The pandemic exposed chronic underfunding in the childcare industry, and while emergency funding provided temporary relief, the long-term sustainability of the sector remains a concern. **The aftereffects of natural disasters and the pandemic continue to strain the early learning system, requiring sustained support for recovery and resilience.**

The assessment underscored the pressing need for greater community-wide awareness, collaboration, and investment in early childhood initiatives to ensure the success and well-being of young children and their families. Engaging all stakeholders, including parents, educators, businesses, policymakers, and community leaders, is essential to foster collaboration, pool resources, and devise innovative strategies that address the unique needs of Northwest Florida. Participants emphasized the value of community activities, events, and resources that support children's development and foster strong community connections. **Achieving positive outcomes for young children and families necessitates a collective, community-driven approach that prioritizes early childhood as a critical issue.**

Introduction

Science has long demonstrated that the first five years of life are a critical window that sets the foundation for children's lifelong health, learning and wellbeing. Early experiences and relationships shape all aspects of healthy development - physical, cognitive, social, and emotional (Davis Schoch, 2023). Communities have an enormous stake in ensuring that all young children and their families have equitable access to the opportunities and supports necessary to thrive. High-quality early care and education is one of the most powerful drivers of positive child outcomes and family economic stability (Bustamante, 2021).

Early Learning Coalitions play an essential role in addressing this challenge. As the state-designated entity overseeing school readiness and voluntary prekindergarten programs in Northwest Florida, the Early Learning Coalition (ELC) works to ensure an integrated, high-quality local early learning system that supports children, empowers families, and advances community priorities. Early Learning Coalitions occupy a pivotal role that bridges early childhood education practices, policy mandates, and community needs, granting them an unparalleled vantage point from which to assess local early learning landscapes and drive collaborative, tailored solutions.

From February to June 2024, the Early Learning Coalition of Northwest Florida (ELCNWF) engaged Public Works to embark on an ambitious effort to take stock of the strengths, needs, and opportunities in our region's early childhood system through the perspectives of over 550 parents, early learning professionals, and cross-sector partners. The following report synthesizes insights from surveys, focus groups, interviews, and administrative data to provide an updated, data-informed picture of Northwest Florida's early learning landscape and actionable recommendations.

The needs assessment prioritized the most current data when available but also incorporated some older yet critical data from 2021 or earlier to provide important context. To support the region's expanded early learning vision and the ELC's target demographic, the assessment focuses on the prenatal period through age nine. However, limitations in available child data were noted, including difficulties in disaggregating data by vulnerable populations, lack of data on home-based/informal care, and challenges in correlating data across sources with varying age ranges. To fully understand families' experiences in supporting child development, qualitative community engagement was deemed as essential as quantitative data.

Through the generous participation and rich input of families, childcare providers, educators, business leaders, policymakers, and other community members, this needs assessment brings to light the very challenges confronting Northwest Florida's early childhood community - but also the profound commitment to our region's youngest children. We offer this report as a tool for us and our community partners to deepen our shared understanding and promote coordinated strategies to make Northwest Florida a place where all children have the opportunity for a strong start in school and life.

Historical context

The availability of quality, affordable childcare is a critical issue impacting families and communities across Northwest Florida. This crisis has reached unprecedented levels in recent years exacerbated by a combination of natural disasters and the COVID-19 pandemic. Hurricane Michael in 2018 severely damaged or destroyed numerous childcare facilities, compounding an already strained childcare infrastructure.

Following Hurricane Michael, which made landfall October 11, 2018, the Early Learning Coalition of Northwest Florida (ELCNWF) received \$7.4 million in disaster recovery funds and launched Operation Kaleidoscope to support the recovery of the childcare sector in the region. The initiative focused on rebuilding playgrounds, restoring indoor classroom learning environments, expanding childcare availability, and providing mental health support. Over \$2.85 million was spent on rebuilding playgrounds at 42 childcare centers, \$1.35 million was allocated to 339 classrooms for learning resources, and \$524K was disbursed for repair and renovation reimbursements.

The Early Learning Coalition of Northwest Florida's Operation Kaleidoscope initiative was crucial in supporting the recovery of the childcare sector following Hurricane Michael. These efforts helped bring normalcy back to the lives of affected children and enabled families to access necessary care. The initiative also supported childcare providers, allowing them to continue serving their communities despite the challenges faced in the aftermath of the hurricane.

The COVID-19 pandemic exposed chronic underfunding in the childcare industry, which has long faced issues providing affordable, quality care. Emergency funding from sources like the American Rescue Plan Act through the childcare stabilization and other grants expiring on June 30, 2024, this aid has limited capacity to drive lasting improvements in childcare access and affordability beyond the crisis. Childcare providers and families are still recovering, but the support systems are ending, leaving them vulnerable once again.

This combination of events has left many families in the region struggling to find accessible and affordable childcare options, while childcare providers find themselves pushed to the brink in an industry that was already under significant strain.

Stakeholder Engagement

The Early Learning Coalition of Northwest Florida (ELCNWF) conducted a comprehensive community needs assessment, gathering qualitative data through an extensive engagement effort involving over 550 participants from various sectors of the early learning system. This included parents, caregivers, childcare providers, teachers, healthcare providers, business providers, schools, higher education, workforce, ELCNWF employees, and others. The engagement consisted of interviews with knowledgeable community members, focus groups with providers and parents, small group discussions, and a community-wide survey. Quotes from these participants are included throughout the assessment to highlight the diverse perspectives received.

In the close-knit communities of Northwest Florida, the Early Learning Coalition's Community Needs Assessment engaged a diverse group of stakeholders who hold various roles and responsibilities while remaining deeply committed to the well-being of young children and families. The community members we talked to exemplify the interconnectedness of our region, where individuals often wear many hats and contribute to the growth and success of children in multiple ways.

Many of the parents we spoke with also serve as educators in their communities, as school districts are typically the largest employers in several counties. These individuals nurture the minds of the next generation both at home and in the classroom. The business leaders who provided valuable insights during our assessment are not only employers but also parents and dedicated volunteers, showcasing their dedication to the community beyond their professional lives.

Among the community professionals we engaged, many are military spouses themselves, intimately understanding the distinct challenges faced by military families while devoting their careers to serving others. Remarkably, all the active military respondents to our survey are parents, and many also work as early childhood teachers or providers, directly contributing to the care and development of our youngest community members. The multidimensional nature of the stakeholders we talked to emphasizes the unique fabric of the region, where every individual plays a crucial role in fostering the growth and success of children and families in Northwest Florida.

The assessment emphasizes that qualitative information gathered from community engagement is crucial in comprehending families' experiences and the community context, complementing the quantitative data collected. This approach ensures a thorough understanding of the needs and challenges faced by families and the early learning community in Northwest Florida.

Stakeholder Type	Method
ELCNWF leadership	Interviews, small group discussion
ELCNWF Board Members	Interviews
Parents	Focus groups, interviews, survey
Childcare providers	Focus group, interview, survey
Early childhood educators	Focus group, interview, survey
ELCNWF SR and VPK recipient parents	Focus group
Employers and business providers	Interviews and Survey

Stakeholder Type	Method
Community Partners: Workforce, Economic Development, Health, Libraries, Head Start	Interviews and Survey
School District Personnel	Interviews and Survey
Community at large	Survey

Interview Findings

Twenty-five interviews were conducted with knowledgeable community members across the seven counties. The interviews identified childcare affordability, availability, and accessibility as the most critical issue impacting families in the region, especially those with infants, toddlers, and children with special needs. Food insecurity also emerged as a frequent challenge, though some local efforts like food voucher programs and local food distribution efforts aimed to address this. Lower-income families could piece together childcare by combining services like Head Start and/subsidies to supplement Florida's limited Voluntary Prekindergarten (VPK) hours, while parents struggled more to piece together full-day childcare. VPK providers noted many children were brought and picked up by grandparents rather than parents.

Several other key concerns were raised, including the necessity for increased public engagement and effective communication about the Early Learning Coalition's programs, which many families currently learn about through word-of-mouth. The shortage of mental/behavioral health providers, especially those offering trauma-informed, non-academically focused care for young children and families, represented a substantial service gap. Speech therapy is another. Concerns centered on the region's ability to meet increasing childcare, early learning, and housing needs driven by rapid population growth across both urban and rural areas. Limited pre-K/VPK hours often conflict with working parents' full-day schedules.

Opportunities were identified for more education and engagement with the private sector, as employers are unaware that childcare subsidies act as a publicly paid benefit allowing employees to work. Eligibility is precariously tied to income limits, so parents make choices about accepting raises or more hours at work based on eligibility limits across multiple benefit programs including SNAP, Health Insurance, and childcare subsidies. Stakeholders express commitment and support to these critical issues and a desire to remain actively involved in addressing them.

Focus Group Insights

Virtual Parent Focus Groups: Two virtual focus groups were held with parents across the region. The parents who participated in the study happened to be former or current recipients of services provided by the Early Learning Coalition (ELC) and further reinforced the critical issue of childcare affordability, expressing that they could only access childcare due to the financial assistance provided by the ELCNWF, which enabled them to maintain employment. When envisioning an ideal childcare system, participants described one that is affordable, staffed by providers attuned to children's developmental needs, and capable of identifying potential special needs early.

In-Person Provider Meeting: An in-person meeting was held at Florida State University, engaging twenty-two childcare providers from four counties: Bay, Calhoun, Franklin, and Washington. The paramount issue discussed was workforce challenges, including severe recruitment difficulties, high turnover rates, and a perceived lack of respect for the profession. Low reimbursement rates, coupled with lengthy delays in completing required background checks, contributed to the inability to retain staff, particularly younger workers who often quit abruptly. This lack of staff continuity was detrimental to providing consistent, high-quality care experiences for children. Providers also highlighted the increasing operational costs they face, such as those for supplies, staff wages, leases, and other expenses, while reimbursement rates remain stagnant. The lingering impacts of Hurricane Michael in 2018 and the COVID-19 pandemic were still present, with providers noting an increased need for mental health services to support children and families that they are ill-equipped to adequately address.

Community Survey

The Early Learning Coalition of Northwest Florida's community wide survey received a substantial 509 responses from a diverse range of stakeholders, including parents, caregivers, childcare providers, educators, community members, business leaders, and government officials. This robust and representative sample offers a comprehensive understanding of the current needs, challenges, and opportunities within the region's early learning system. The insights gathered from the survey responses can help guide the Early Learning Coalition's strategic planning, resource allocation, and program development efforts, ensuring that their work aligns with the priorities of the communities they serve.

Survey Distribution:

The survey was distributed through various channels to reach a wide audience. Partners, such as school districts and local chambers of commerce, assisted in disseminating the survey. It was distributed via e-mail and promoted on social media platforms, including Instagram and Facebook. Additionally, coalition staff distributed 750 postcards at local events, such as pre-kindergarten registration, to encourage participation.

Diverse Stakeholders:

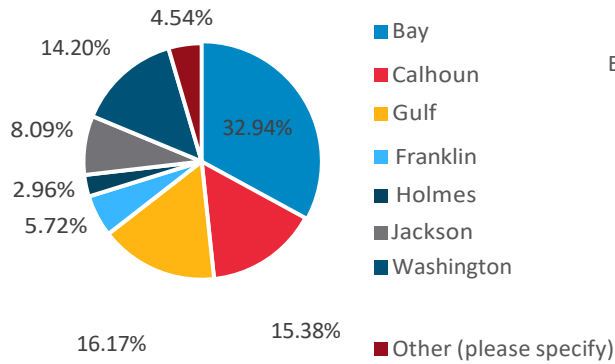
The stakeholders who engaged in the survey process represented a diverse cross-section of the community, ranging from parents of infants to retirees, and including teachers, faith leaders, and business executives. Northwest Florida is a close-knit community where individuals often hold multiple roles. For example, employers may also be parents, and parents may work as teachers. Families may have children across different age groups and may utilize more than one childcare arrangement.

Survey Respondents and Results:

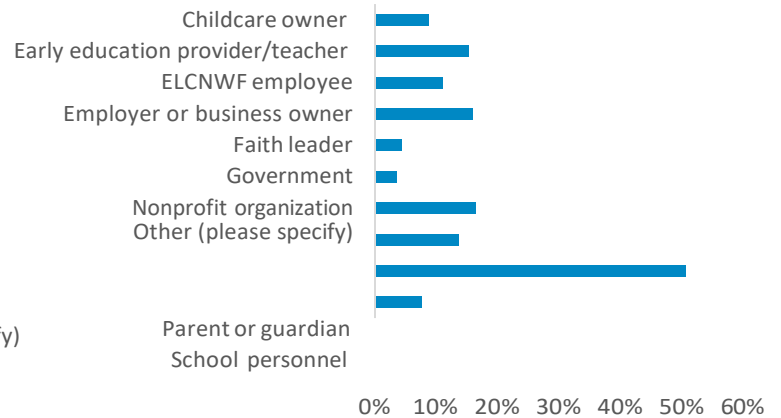
The survey highlights are described throughout the document, and detailed survey results are presented in Appendix A. It is important to note that due to the overlapping roles and multiple

childcare arrangements of some respondents, the percentages in the following charts may not always add up to 100 percent.

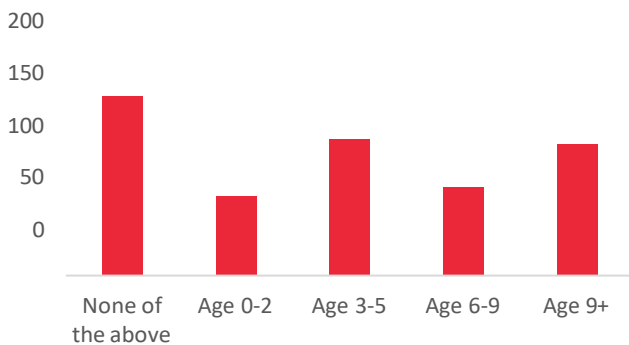
What County do you Live in?



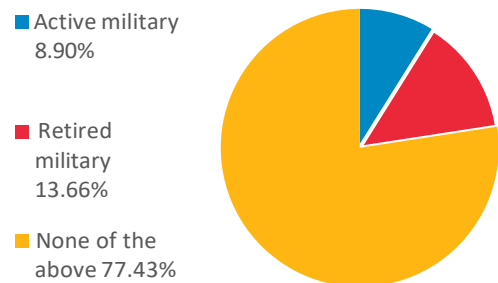
Role in the Community



Age of Children of Parent or Caretaker Respondents



Military Households



Childcare Arrangements

- The survey revealed families utilize a mix of childcare options based on their unique needs. The most common arrangements were parental/in-home care (35.8 percent) and childcare centers/preschools (27.7 percent). However, many families, particularly those with infants and toddlers, leveraged a patchwork of multiple options like individual care, preschool, and family members.
- Notable differences existed across counties:
 - Holmes County had the highest rate of at-home care at 72.7, while Bay County had the highest percentage of childcare at a center or preschool (35.8 percent) and afterschool care (19 percent).

- Calhoun County has the highest percentage of individual care from someone else (37.7 percent) and no respondents for other arrangements.
- Franklin and Gulf Counties have similar distributions, with at-home care being the most common, followed by individual care and childcare centers.
- Jackson County has a relatively even distribution between childcare centers (37.0 percent) and at-home care (33.3 percent).
- Washington County has a high percentage of at-home care (51.85 percent) and a lower percentage of childcare center use (20.4 percent) compared to other counties.
- Jackson and Washington counties have the highest percentage of families currently looking for childcare at 7.4 percent.

Parental Experiences

- Cost of living emerged as the top concern among parents, selected by 73.9 percent. Over 50 percent were also worried about managing their child's technology use (54.6 percent), finding quality childcare (51.67 percent), or their child's emotional health (51.50).
- Most parents felt confident supporting learning at home, with 85.4 percent assured in encouraging reading and 77.7 percent for math skills. However, about 20 percent of infant/toddler parents lacked awareness of where to find educational resources.

Community Service Needs

- All three Coalition program areas - free pre-K, childcare subsidies, and infant/toddler enrichment - were viewed as high-need, with 79 percent rating them as very/extremely needed.
- Parks and recreational areas are the most frequently used community service at 69 percent, highlighting their value. Access to healthy food, healthcare, affordable childcare, and job training are also among the most important community issues identified.

Parent/Provider Support Services

- Parent support programs are considered highly important, with over 78 percent prioritizing playgroups, developmental checklists, parent groups, and activities for non-enrolled children.
- Similarly, provider support like financial assistance for childcare businesses and staff training opportunities were deemed very/extremely important by over 84 percent of respondents.

Stakeholder Engagement Themes

To analyze the qualitative feedback from interviews, focus groups, and meetings, all stakeholder comments were coded by theme. This involved carefully reviewing all comments, identifying recurring topics, assigning codes, and grouping similar inputs together. The coded data was then analyzed to identify the most significant overarching themes that emerged across the diverse stakeholder inputs. By using this coding methodology, the analysis provided a comprehensive summary of the broad stakeholder perspectives in the form of major themes:

1. **Childcare accessibility, availability, and affordability** are major concerns, especially for infants, toddlers, and children with special needs. Access to affordable high-quality childcare was the top need identified by participants.
2. **Mental health support** for children, families and providers is a growing trend. Access to and availability of mental and behavioral services is a challenge, in urban and rural areas, for young children and children with special needs.
3. **Childcare providers** and teachers face staffing shortages, low wages, and rising prices. There is a shortage of qualified teachers, especially those equipped to work with children with special needs. Low wages and limited benefits contribute to high turnover rates among early learning professionals.
4. **Parents of young children** desire more community resources, activities, and support. Parents and caregivers would like to gain more parenting knowledge. Parents would like a variety of formal and informal supports beyond childcare, including accessible pre-K options.
5. **Increased funding and support** are needed to improve the quality and accessibility of early learning programs. Participants described the lack of sufficient funding that impacts families and providers in a variety of ways, including a lack of support for the costs of operating childcare businesses (wages, rent, insurance, and school readiness). For many parents, particularly single parents, access to affordable childcare is only possible through the support of organizations like the ELCNWF.
6. Opportunities exist for increased **communication** among the ELCNWF, providers, employers, and the community. A considerable number of survey respondents are unfamiliar with the ELCNWF and learn of the Coalition's programs through "word of mouth."
7. Participants emphasized the value of **using data** to gauge progress and effectively communicate about the current landscape of early childhood education in the region
8. Survey participants emphasized the need for **public spaces like libraries and parks** that facilitate social connections, **recreational opportunities**, and quality of life for young learners, their families, and the larger community.

The major overarching themes that surfaced through this coding and roll-up process are detailed in the following tables, which captures the key takeaways and selected quotes from the stakeholder engagement process.

Accessibility, Affordability, Availability of Early Learning Services	
Access to affordable, high-quality early childhood services, particularly childcare, is a significant challenge for many families in Northwest Florida, with issues of affordability, availability, and accessibility creating barriers to meeting the diverse needs of children and their caregivers.	
<p>Key Takeaways:</p> <ul style="list-style-type: none"> • Many families struggle to afford high-quality childcare, which can limit their access to early learning opportunities and create financial stress. • Affordability and availability of services came up frequently and were often interconnected. • These challenges played out across a wide range of needs, from childcare to housing to food and other needs. • Access included issues of location, hours, wait lists, or wait times, and eligibility for certain services. • Affordability included issues of cost (co-pays, extended care) for low-income families, as well as higher income families who do not qualify for subsidies but are challenged to pay privately for services. • Availability included issues of inadequate supply for certain services, and flexible/available hours to meet family work schedules for childcare. • Access to affordable quality childcare is the top need/gap participants identified. Many participants see the underlying cause of that is the substantial gap between the cost of providing childcare and the availability of funding to support families who need childcare services. • Insufficient resources across the region: The lack of quality childcare providers and affordable options is a widespread issue affecting the entire Northwest Florida region. • VPK- Some parents faced difficulties finding schools that accommodate part-time VPK hours without requiring full-time attendance and additional costs. • Access to services like speech therapy, developmental screenings, and early intervention is challenging. 	<p>Selected Quotes:</p> <p><i>Affordability:</i></p> <p><i>"Affordable childcare has become almost nonexistent. Childcare facilities face insurmountable challenges with providing quality childcare at a cost that parents can afford. As mandatory operating costs go up, rates have to increase accordingly to the point that families are not going to be able to afford them without assistance."</i></p> <p><i>"Parents not able to afford price of living yet alone childcare."</i></p> <p><i>Availability:</i></p> <p><i>"There is little VPK availability in Bay Co. with lengthy waitlists."</i></p> <p><i>"There is a great need for quality childcare providers across the entire Northwest region."</i></p> <p><i>Accessibility:</i></p> <p><i>"Extreme lack of access to quality day care and school readiness programs."</i></p>

Mental and Behavioral Health

Access to mental and behavioral health services for children in Northwest Florida is a significant challenge, exacerbated by Hurricane Michael and the Covid-19 pandemic, placing an additional burden on childcare and early learning providers.

Key Takeaways:

- Access to and availability of mental and behavioral health services is a challenge, in urban and rural areas. This has been compounded by the impacts of Hurricane Michael and Covid.
- Children without adequate mental and behavioral health support in turn impact childcare and early learning providers, who bear an additional burden of trying to address mental health needs when children are in their care.
- Mental health for children also often correlates with mental health support for the family.
- Increased shortage of community mental health providers after Hurricane Michael when many providers were hired into schools.

Selected quotes:

"And I used to say I don't care about colors and numbers. Can we teach them how to stand there without hitting somebody? Right. That's not what I care about. I care about can you function. And that's where, you know, when you hear school saying they're not ready, it's usually not because they don't know their colors. It's because they're not manageable."

"These are not the same kids as 10 years ago."

"After Hurricane Michael, ... you can't find a provider if you wanted to".

"Lots of tent living after the storm. It's decreased but still exists. It isn't uncommon to see someone who appears to have mental health issues walking around with nowhere to go but it never was the case before."

Early Childhood Education Providers

Childcare providers in Northwest Florida struggle with insufficient funding that threatens their sustainability. They face high operational costs from licensing, staffing, special needs support, and facility requirements, yet reimbursement rates for subsidies do not adequately cover these expenses. This makes it challenging to maintain operations, pay competitive wages to attract and retain quality staff, and invest in improvements for delivering high-quality childcare service.

Key takeaways:

- Provider sustainability: Insufficient funding makes it difficult for childcare providers to maintain their businesses, pay competitive wages, and invest in quality improvements.
- Childcare providers reported facing multiple costs in operating their business, including licensing requirements (background checks ratios and capacity limits); educational requirements and training for staff; additional time and supports needed for children with special needs; student/teacher ratio requirements; minimum wage requirements; materials and supplies; and meeting safe facility space needs.
- At the same time, reimbursement rates for childcare subsidies do not cover operating costs. Taken together, participants said that these factors force many providers to either charge higher rates and/or take only higher income families who can pay out of pocket, or to close, exacerbating the lack of supply.
- Minimum wage mandates, local competition for workers, and the aim to offer fair pay comparable to school districts raise expenses, yet wages remain insufficient to draw in and keep staff.
- Some childcare providers highlighted the significant upfront expenses related to background checks, training, and education for teachers.
- Many providers said that the comparatively lower wages and educational requirements make it harder to recruit and retain quality staff.
- Strengths noted included existing professional development and training resources funded through ARPA grants.

Selected quotes:

"Funding needs to be available to help us retain teachers we've had for 14-20 years. Minimum wage continues to go up. We keep small ratios for quality but are financially stressed."

"With rising costs, childcare centers will not be able to afford to stay open without financial assistance."

"Training is needed for providers on business management and administration. It is very tough to meet all the paperwork requirements while teaching and running programs."

"Challenges facing staffing, funding to stay open, parents not able to afford the price of living let alone childcare. Hiring process- Pay for background and training and then they don't show up. We can't hold the max amount of kids because staffing problem. Can't afford insurances have to have repairs, maintenance to be able to be license. New hires are being given new grant or stimulants to come than our staff who have been here forever."

Early Childhood Education Workforce

Ensuring a qualified and stable early childhood education workforce is a crucial challenge in Northwest Florida, as the field faces issues such as teacher shortages, especially for those equipped to work with children with special needs, safety concerns deterring potential candidates, low wages and limited benefits contributing to high turnover rates, and a perceived lack of respect for the profession.

Key takeaways:

- There is a shortage of qualified teachers, especially those equipped to work with children with special needs.
- Safety concerns, such as the potential for school violence, deter some young women from pursuing careers in classroom settings.
- Minimum wage increases strain childcare centers' ability to retain experienced teachers they have had for many years, as operating costs rise.
- Low wages and limited benefits contribute to high turnover rates among early learning professionals, which can negatively impact the quality and consistency of care.
- Once on the job, staff face stress from the nature of the work, and the prohibitive cost of living in some areas. This leads to high turnover, creating added costs for the business owner.
- Parents, caregivers, and providers noted the need for strategies to reduce the rate of staff turnover and stabilize the workforce.
- While some facilities have caring, dedicated teachers and staff, the early childhood education field faces workforce challenges around recruitment, compensation, training, and safety perceptions.
- Early childhood educators lack comprehensive benefits like paid time off, retirement plans, and healthcare, which makes retention difficult.
- Early childhood educators do not feel respected by the community.

Selected quotes:

"Funding needs to be available to help us retain teachers we've had for 14-20 years. Minimum wage continues to go up. We keep small ratios for quality but are financially stressed."

"With rising costs, childcare centers will not be able to afford to stay open without financial assistance."

"Financial supports for childcare businesses" was rated as "Extremely Important" by 56.7% of respondents.

"After Hurricane Michael, the school system got a grant, and they pulled out about 3 mental health clinicians from the area for each school."

"The ELCNWF provided training on Business Management with ARPA dollars, which was really good- need more of this. ARPA dollars- provided \$\$ to cover the cost of background check fees for early learning teachers."

"The local ELC has a large financial impact on my community."

Parents and Caretakers

Parents and caregivers in Northwest Florida have diverse needs and preferences, ranging from a desire for increased parenting knowledge and appreciation for existing services, to reliance on informal support networks and challenges in balancing childcare options with work and financial constraints.

Key takeaways:

- Most parents and caregivers wish to gain more parenting knowledge.
- Parents appreciate the services of ELCNWF.
- A frequently cited source of support for many parents is help from grandparents, other family members, friends, and neighbors.
- They also choose the mix of informal, home, center-based care that is right for their child and family.
- Many parents choose to stay home while others do so because the cost of care is too high either by choice or out of necessity.
- Parents express a strong need for a variety of informal and formal supports beyond just childcare, including accessible pre-K options that fit their schedules,
- Parent support programs like activities, checklists, and groups are also rated “very important.”
- The survey showed many counties have more children in informal, home-based childcare rather than centers. These findings suggest allocating more resources to support parents as caregivers, provide informal activities, and ensure developmental resources reach home-based care settings.
- Specific communities
 - Military
 - Grandparents

Selected quotes:

"Bay County- Tyndell Airforce base Tyndell is rapidly growing rapidly which is great, but they don't have enough space so is putting pressure on housing supply and childcare."

"With Tyndell growing there is a huge need for childcare and we can't meet that need (childcare owner)."

"I am so grateful for ELC without this program I would not be able to work and take care of me and my daughter!"

"Thanks for helping parents who would have no other options."

"Thank you so much!"

"ELC is very supportive of providers and families."

"Thanks for helping parents who would have no other options."

Funding

Ensuring adequate funding and support for early learning programs is a critical issue that profoundly impacts kindergarten readiness and the well-being of families and childcare providers in Northwest Florida.

Key takeaways:

- Increased funding and support are needed to improve the quality of early learning programs and ensure kindergarten readiness.
- Participants described the lack of sufficient funding as having impacts on families and providers in a variety of ways, including lack of support for the costs of operating childcare businesses (wages, rent, insurance, and the need for additional funding to support needed and valued services, such as school readiness and VPK.
- Importance of financial assistance programs: For many families, particularly single parents, access to affordable childcare is only possible through the support of organizations like the Early Learning Coalition (ELC).
- "Financial support for childcare businesses" was rated as "Extremely Important" by 56.7% of respondents.

Selected quotes:

"Funding needs to be available to help us retain teachers we've had for 14-20 years. Minimum wage continues to go up. We keep small ratios for quality but are financially stressed."

"With rising costs, childcare centers will not be able to afford to stay open without financial assistance."

"Financial supports for childcare businesses" was rated as "Extremely Important" by 56.7% of respondents.

"After Hurricane Michael, the school system got a grant, and they pulled out about 3 mental health clinicians from the area for each school."

"The ELCNWF provided training on Business Management with ARPA dollars, which was really good- need more of this. ARPA dollars- provided \$\$ to cover the cost of background check fees for early learning teachers."

"The local ELC has a large financial impact on my community."

Community Awareness and Support

There is a pressing need to raise public awareness and advocate for early learning and family needs in Northwest Florida, as many survey respondents expressed limited familiarity with the Early Learning Coalition of Northwest Florida (ELCNWF) and found some program language confusing.

Key takeaways:

- Some said there is a general need to continue raising public awareness of and advocating for both early learning and what families need.
- A considerable number of survey respondents were unfamiliar with the ELCNWF.
- Many cited “word of mouth” as how they learned about the ELCNWF.
- Only 51% of 425 respondents indicated being “extremely familiar” or “very familiar” with the Early Learning Coalition, while 18.8% were “not so familiar” or “not at all familiar”. This points to an opportunity to increase public awareness and outreach efforts.
- The ELC website (elcnwf.org) was used by over half of respondents, with over 93% finding it clear and effective for accessing childcare referrals, community events, parenting resources, program enrollment, developmental checklists, and more.
- Many parents found some of the program language confusing especially “school readiness.”

Selected quotes:

“The childcare subsidy program is pretty work of mouth there. Not sure how else people find out about it.”

“I am so grateful for ELC without this program I would not be able to work and take care of me and my daughter!”

“Thank you so much!”

“ELC is very supportive of providers and families.”

“Thanks for helping parents who would have no other options.”

“Can we see the completed assessment?”

Data and Data Sharing

Stakeholders emphasized the importance of comprehensive data collection, effective data utilization, and clear communication to measure progress, monetize investments, raise public awareness, and advocate for early learning and family needs in Northwest Florida.

Key takeaways:

- Some commented about data: needing comprehensive data, using data effectively to measure progress, and monetizing the investment the ELC makes into the local economy and local businesses.
- Stakeholders increasingly recognize the value of using data to gauge progress and effectively communicate the current landscape of early childhood education. Kindergarten readiness scores, which have captured significant public attention, serve as a critical metric for assessing the impact of early learning initiatives.
- Some said there is a general need to continue raising public awareness of and advocating for both early learning (what it is, why it's important) and what families need.

Selected quotes:

"As a large employer I know that I must have employees receiving subsidies, but I have no idea how many or how much the ELC has invested in my employees. If you could get around privacy issues it would be interesting to know that."

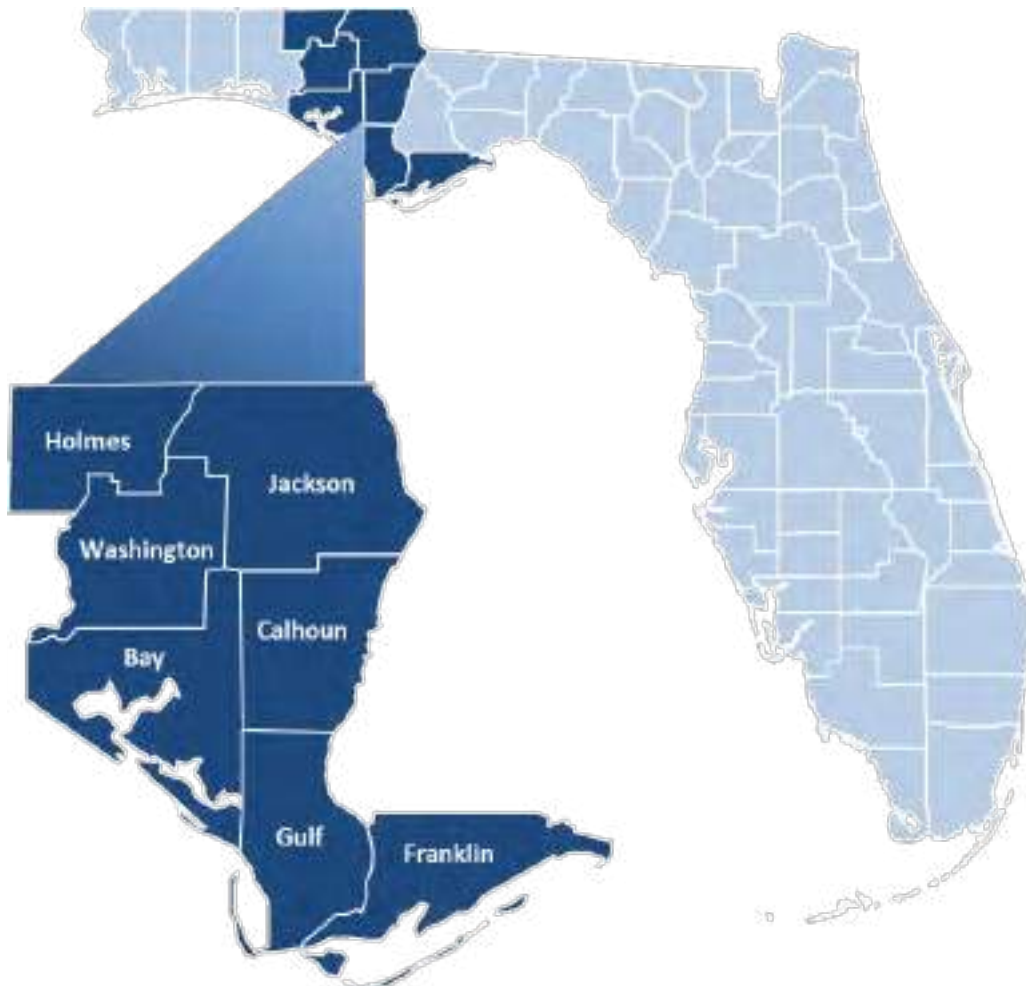
"Employers are not aware of the ELCs contributions to subsidize their employees,"

"Leverage data to track progress and tell the story."

"Less than 50% or maybe only 51% now of children entering Kindergarten are ready to read."

Northwest Florida Children and Families- Demographics

The **Northwest Florida** region, also known as the Florida Panhandle, consists of several unique counties, each with its unique characteristics and attractions. The counties of Bay, Calhoun, Holmes, Franklin, Gulf, Jackson, and Washington make up a sizable portion of this region. From the stunning Gulf Coast beaches of Bay, Franklin, and Gulf Counties to the rural agricultural landscapes of Calhoun, Holmes, Jackson, and Washington Counties, Northwest Florida offers a wide range of experiences for residents and visitors alike. The region is known for its natural beauty, outdoor recreational opportunities, historical sites, and charming small towns. The area is served by several school districts, each providing education to students in their respective counties.



Bay County: Located on the Gulf Coast, Bay County is known for its beautiful beaches, including Panama City Beach. The county seat is Panama City, and the area is a popular tourist destination, offering various water activities, parks, and entertainment options. Bay District Schools serves the county, with 18 elementary schools, 6 middle schools, 5 high schools, 2 multi-grade schools, 3 special purpose schools, 1 adult/technical school, 6 charter schools and one virtual school.

Tyndall Air Force Base, located near Panama City, Florida, is undergoing a major \$5 billion reconstruction project, following its destruction after Hurricane Michael to become the "Installation of the Future." The base is the largest employer in Bay County and has brought thousands of new military families to the area. The Panama City area is also home to Naval Support Activity Panama City, which hosts several important naval units, including the U.S. Coast Guard Station Panama City. Additionally, the region boasts five higher education institutions, offering a range of educational opportunities supporting the local community and military presence.

Calhoun County: Situated in the Florida Panhandle, Calhoun County is a rural area with a population of around 14,000. The county seat is Blountstown, and the Apalachicola River runs through the county, providing opportunities for fishing and outdoor recreation. The Calhoun County School District serves its students elementary school and several combined schools (Pre-K-8th, Pre-K-12th, and 6-12th).

Chipola College, located in Marianna, is a public state college that offers associate's degrees and workforce training programs for the residents of Calhoun County and surrounding areas.

Franklin County: As previously described, Franklin County is located on the Gulf Coast and is known for its oysters, beautiful beaches, and charming coastal communities like Apalachicola. The county is a popular destination for fishing, boating, and other outdoor activities. The Franklin County School District has primarily consolidated its full array of educational services into two sites at Franklin County School (Pre-K- 12) and Apalachicola Bay Charter School (K-8).

Franklin County Schools offer Career Academies and STEM initiatives to prepare students for future workforce opportunities beyond high school.

Gulf County: Located in the Panhandle along the Gulf of Mexico, Gulf County is known for its pristine beaches, fishing opportunities, and laid-back lifestyle. The county seat is Port St. Joe, and the area is home to St. Joseph Peninsula State Park, which offers camping, hiking, and water activities. The Gulf County School District consists of 2 elementary schools, and 2 combination schools (7th-12th).

Gulf Coast State College has a campus in Port St. Joe that provides educational opportunities and workforce training for the residents and industries of Gulf County, such as supporting the thriving seafood industry and capitalizing on the eco-tourism drawn to the area's world-famous bay and beaches.

Holmes County: Located in the Panhandle, Holmes County is a small, rural county with a population of about 20,000. The county seat is Bonifay, and the area is known for its agriculture, particularly its cotton and peanut production. The Holmes County School District serves students at 6 schools which include elementary, high school, and combination schools.

Jackson County: Bordering Alabama and Georgia, Jackson County is known for its agriculture, particularly its peanut and cotton production. The county seat is Marianna, and the area offers several outdoor recreational opportunities, including caves, springs, and parks. The Jackson

County School District operates 10 schools including elementary, middle high schools, and 4 specialized educational programs from early education to adult education.

Chipola College and Florida Panhandle Technical College provide workforce training programs that create a strong pipeline of skilled workers for Jackson County's industries.

Washington County: Located in the Panhandle, Washington County is a rural area with a population of around 25,000. The county seat is Chipley, and the area is known for its agriculture and outdoor recreational opportunities, including the Falling Waters State Park, which features a 73-foot waterfall. The Washington County School District operates 2 elementary schools, 2 middle schools, and 2 high schools.

Population Overview

The seven counties forming the ELCNWF service area range in size. In 2024, Franklin, Calhoun and Gulf are the smallest counties with fewer than 20,000 residents. Holmes and Washington have a population between 20,235 and 25,799. Jackson County’s population approaches 50,000 and Bay County’s population approaches 200,000. The counties’ growth rate from 2020 to 2024 ranges from 1.7 to 12.5 percent compared with Florida’s 6.7 percent growth. Three counties – Gulf, Bay, and Washington’s growth rate ranges between 10.6 and 12.8 percent.

TABLE 1 NORTHWEST FLORIDA COUNTY AND STATE POPULATION 2020-2024

County	2020	2021	2022	2023	2024	Growth Rate 2020-2024
Bay	174,506	179,498	185,134	190,770	196,328	12.5%
Calhoun	13,707	13,518	13,465	13,470	13,475	1.7%
Franklin	12,468	12,183	12,492	12,594	12,696	1.8%
Gulf	14,259	14,462	15,299	15,693	16,087	12.8%
Holmes	19,578	19,309	19,653	19,944	20,235	3.4%
Jackson	47,096	47,119	48,255	48,622	48,989	4.0%
Washington	23,320	24,867	25,405	25,602	25,799	10.6%
Total	304,934	310,956	319,703	319,703	333,609	9.4%
Florida*	21,538,216	21,830,708	22,245,521	22,610,726	22,975,931	6.7%

Source: World Population Review.

*Source: US Census Bureau QuickFacts 2023.

Race and Ethnicity

The seven counties are racially and ethnically diverse. Compared to Florida statewide, the counties have a lower Hispanic or Latino population; most also have a lower Black/African American population and higher White population.

TABLE 2 RACE AND ETHNICITY - 2022

County	Hispanic or Latino	Black or African American	White	Asian	American Indian/Alaskan Native	Pacific Islander	Two or More Races
Bay	7.9%	11.8%	81.1%	2.4%	0.8%	0.2%	3.5%
Calhoun	6.4%	12.2%	82.4%	0.9%	1.6%	0.2%	2.7%
Franklin	5.6%	10.3%	85.9%	0.5%	1.0%	0.1%	2.2%
Gulf	4.5%	14.2%	81.6%	0.7%	0.8%	0.7%	2.7%
Holmes	3.4%	6.9%	88.3%	0.8%	1.2%	0.2%	2.7%
Jackson	5.6%	25.8%	70.0%	0.7%	0.9%	0.2%	2.3%
Washington	4.7%	13.3%	80.6%	0.8%	1.4%	0.4%	3.4%
Florida	27.1%	17.0%	76.8%	3.1%	0.5%	0.1%	2.4%

Source: US Census Bureau QuickFacts; Census Reporter Profile Data; ACS 2022.

Place of Birth and Citizenship

The counties vary in the percent of residents that were born in the respective county from 41.1 to 66.3 percent. However, this percentage is considerably higher than statewide (35.9 percent). The counties have a smaller percentage of foreign-born residents (1.7 to 7.3) than Florida (21.0 percent) as well as the percentage of non-citizens.

TABLE 3 PLACE OF BIRTH AND CITIZENSHIP

Place of Birth	Bay	Calhoun	Franklin	Gulf	Holmes	Jackson	Washington	Florida
Born in County	41.1%	66.3%	58.1%	52.9%	57.1%	61.6%	60.3%	35.9%
Native Born	92.7%	96.7%	96.3%	96.6%	98.3%	97.7%	96.7%	79.0%
Foreign Born	7.3%	3.3%	3.7%	3.4%	1.7%	2.3%	3.4%	21.0%
Non-Citizens	3.5%	2.4%	2.0%	1.9%	0.7%	1.2%	2.4%	8.8%
Naturalized	3.8%	1.0%	1.8%	1.6%	1.0%	1.2%	0.9%	12.2%

Source: World Population Review.

Languages Spoken at Home

The data shows that the seven counties in Florida have a significantly higher percentage of residents who speak only English at home (ranging from 90.6 percent to 95.3 percent, with Holmes County being the highest) compared to the state average of 70.2 percent. The percentage of residents speaking other languages, including Spanish, is much lower in these counties than the state average. Bay County has the highest percentage of Spanish speakers at 4.9 percent and the highest percentage for languages other than English at 9.4 percent.

TABLE 4 LANGUAGES SPOKEN AT HOME

Languages	Bay	Calhoun	Franklin	Gulf	Holmes	Jackson	Washington	Florida
Speak only English	90.6%	93.3%	93.6%	94.0%	95.3%	94.2%	93.8%	70.2%
Speak Other Languages	9.4%	6.7%	6.4%	6.0%	4.7%	5.8%	6.2%	29.8%
Speak Spanish	4.9%	4.8%	4.3%	3.9%	3.6%	4.0%	3.8%	22.1%

Source: 2024 World Population Review.

Income and Employment

Income

The income data shows notable disparities across Florida counties. Rural areas like Calhoun and Holmes have the lowest median household and per capita incomes, while the state overall is highest. Family incomes are uneven, with medians of \$55,000-\$77,000 but higher means. Non-family households often have incomes below \$30,000, while married families frequently exceed \$70,000. The statistics highlight regional divides and challenges faced by different household types in Florida.

TABLE 5 INCOME BY COUNTY

Income	Bay	Calhoun	Franklin	Gulf	Holmes	Jackson	Washington	Florida
Median Household Income	\$65,999	\$41,526	\$58,107	\$56,250	\$46,063	\$46,144	\$47,536	\$67,917
Per Capita Income	\$36,868	\$21,324	\$31,422	\$30,011	\$22,860	\$23,210	\$23,984	\$38,850
Families	\$77,037 (Md)	\$65,776 (Md)	\$65,462 (Md)	\$70,654 (Md)	\$55,802 (Md)	\$58,273 (Md)	\$60,172 (Md)	\$74,237 (Md)
	\$100,394 (Mn)	\$74,885 (Mn)	\$90,856 (Mn)	\$92,966 (Mn)	\$70,695 (Mn)	\$76,149 (Mn)	\$74,095 (Mn)	\$102,392 (Mn)
Households	\$65,999 (Md)	\$41,526 (Md)	\$58,107 (Md)	\$56,250 (Md)	\$46,063 (Md)	\$46,144 (Md)	\$47,536 (Md)	\$61,777 (Md)
	\$88,375 (Mn)	\$60,413 (Mn)	\$77,080 (Mn)	\$79,013 (Mn)	\$58,649 (Mn)	\$62,374 (Mn)	\$63,246 (Mn)	\$88,267 (Mn)
Married Families	\$93,548 (Md)	\$78,861 (Md)	\$75,982 (Md)	\$82,882 (Md)	\$60,789 (Md)	\$71,841 (Md)	\$72,415 (Md)	\$88,158 (Md)
	\$116,446 (Mn)	-	-	-	-	-	-	\$118,266 (Mn)
Non-Families	\$46,188 (Md)	\$23,920 (Md)	\$34,031 (Md)	\$42,595 (Md)	\$27,513 (Md)	\$26,274 (Md)	\$28,391 (Md)	\$39,047 (Md)
	\$62,134 (Mn)	\$33,517 (Mn)	\$49,691 (Mn)	\$50,449 (Mn)	\$33,295 (Mn)	\$35,335 (Mn)	\$34,926 (Mn)	\$58,002 (Mn)

Source: Census 2023 QuickFacts and World Population Review.

** Md” refers to “Median;” Mn” refers to “Mean.”

Labor Force Participation

Labor force participation ranges between 41.4 and 61.9 percent across the seven counties. Bay County has the highest participation at 61.9 percent, exceeding the Florida statewide participation of 59.4 percent. Labor force participation in the remaining six counties ranges from 41.4 to 49.3 percent.

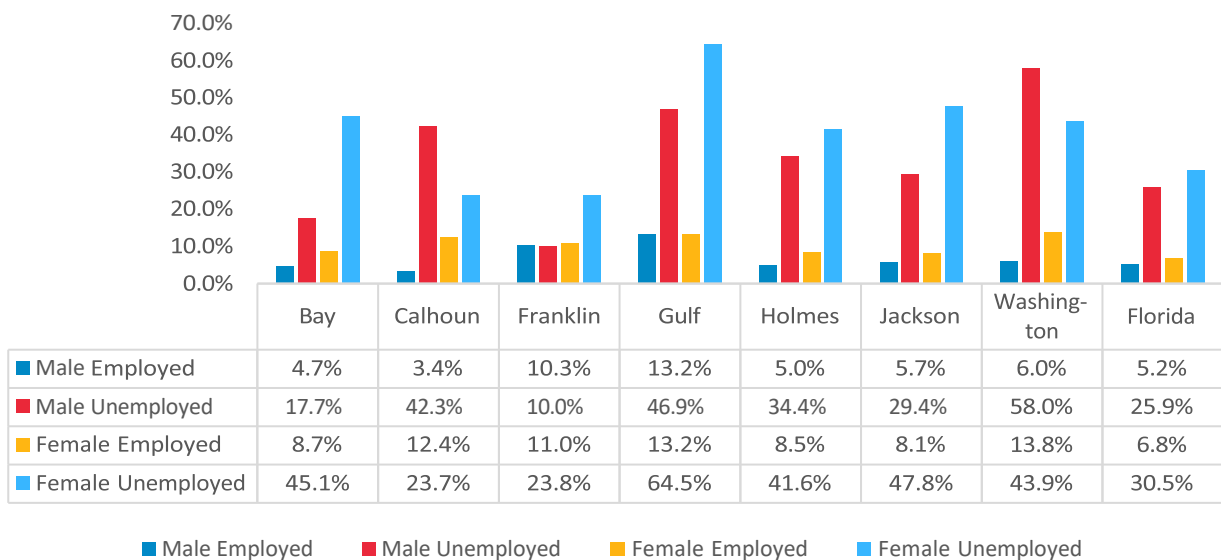
The unemployment rate in the seven counties ranges from 3.7 to 8.9 percent. Except for Franklin County, which has an unemployment rate of 8.9 percent, the other six counties' unemployment rate is below the Florida statewide average of 5.3 percent. Unemployment is a greater predictor of poverty for women.

TABLE 6 LABOR FORCE PARTICIPATION

Labor Force Participation	Bay	Calhoun	Franklin	Gulf	Holmes	Jackson	Washington	Florida
Labor Force Participation	61.9%	41.4%	44.6%	42.4%	49.3%	42.5%	44.4%	59.4%
Employment Rate	57.5%	39.9%	40.6%	40.5%	46.7%	40.3%	42.3%	55.9%
Unemployment Rate	4.0%	3.7%	8.9%	4.3%	4.7%	4.7%	4.8%	5.3%

Source: World Population Review.

FIGURE 1 PERCENT IN POVERTY BY GENDER AND EMPLOYMENT

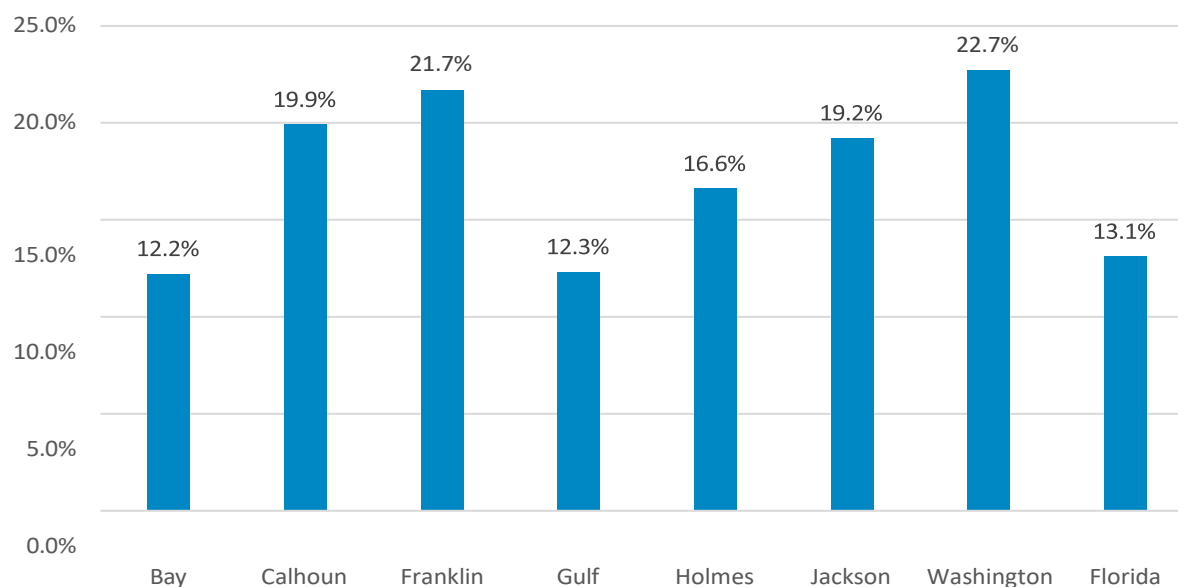


Source: World Population Review.

Poverty

The poverty rate in the seven counties ranged from 12.2 to 22.7 percent. All but two counties' poverty rates (Bay and Gulf) were lower than Florida's 13.1 percent rate. Franklin and Washington Counties' poverty rate exceeded 20 percent.

FIGURE 7 POVERTY RATE BY COUNTY AND STATE



Source: World Population Review.

Among the largest racial/ethnic groups, poverty rates in most counties were high among Black and Hispanic populations and lower among Whites.

TABLE 8 POVERTY RATE BY RACE/ETHNICITY

	Bay	Calhoun	Franklin	Gulf	Holmes	Jackson	Washing gton	Florida
Hispanic	19.7%	57.9%	28.8%	26.1%	5.2%	26.9%	9.5%	15.9%
Other	21.4%	63.9%	89.8%	68.8%	14.2%	29.3%	-	18.8%
Black	19.7%	37.4%	33.6%	27.6%	54.5%	25.6%	25.8%	20.5%
Multiple	25.6%	47.1%	12.8%	7.4%	16.45	17.2%	6.9%	13.6%
White	9.6%	14.4%	19.7%	11.0%	15.7%	16.9%	23.2%	9.6%
Asian	8.9%	-	-	-	-	-	43.0%	11.3%
Native	17.5%	5.3%	-	-	0.8%	13.1%	30.9%	18.2%
Pacific Islander	6.5%	-	-	-	16.7%	-	-	16.6%
Overall Poverty Rate	12.2%	19.9%	21.7%	12.3%	16.6%	19.2%	22.7%	13.1%

Source: World Population Review.

Growing ALICE Population

The ALICE (Asset Limited, Income Constrained, Employed) metric provides a more comprehensive understanding of financial hardship by including households that earn above the Federal Poverty Level (FPL) but still struggle to afford necessities in their respective communities. Focusing exclusively on the ALICE 2022 data reveals that Holmes County has the highest percentage of ALICE households at 45.3 percent followed by Calhoun County with 41.0 percent and Jackson County with 40.3 percent indicating that a sizable portion of the employed population in these counties faces financial challenges despite being above the FPL. Gulf County (37.7 percent) and Washington County (37.6 percent) follow Bay County and Franklin County have the lowest percentages of ALICE households with 30.7 and 29.6 percent, respectively.

Poverty and ALICE Households by County

County	Total Households	Poverty Households	% Households in Poverty	ALICE Households	% ALICE Households	% Below ALICE Threshold**
Bay	79,044	8,303	10.5%	24,284	30.7%	41.2%
Calhoun	4,448	844	19.0%	1,823	41.0%	60.0%
Franklin	4,761	900	18.9%	1,409	29.6%	48.5%
Gulf	5,648	789	14.0%	2,127	37.7%	51.6%
Holmes	7,069	1,265	17.9%	3,199	45.3%	63.1%
Jackson	16,880	3,130	18.5%	6,811	40.3%	58.9%
Washington	9,095	1,820	20.0%	3,418	37.6%	57.6%
Florida	8,800,279					46.0%

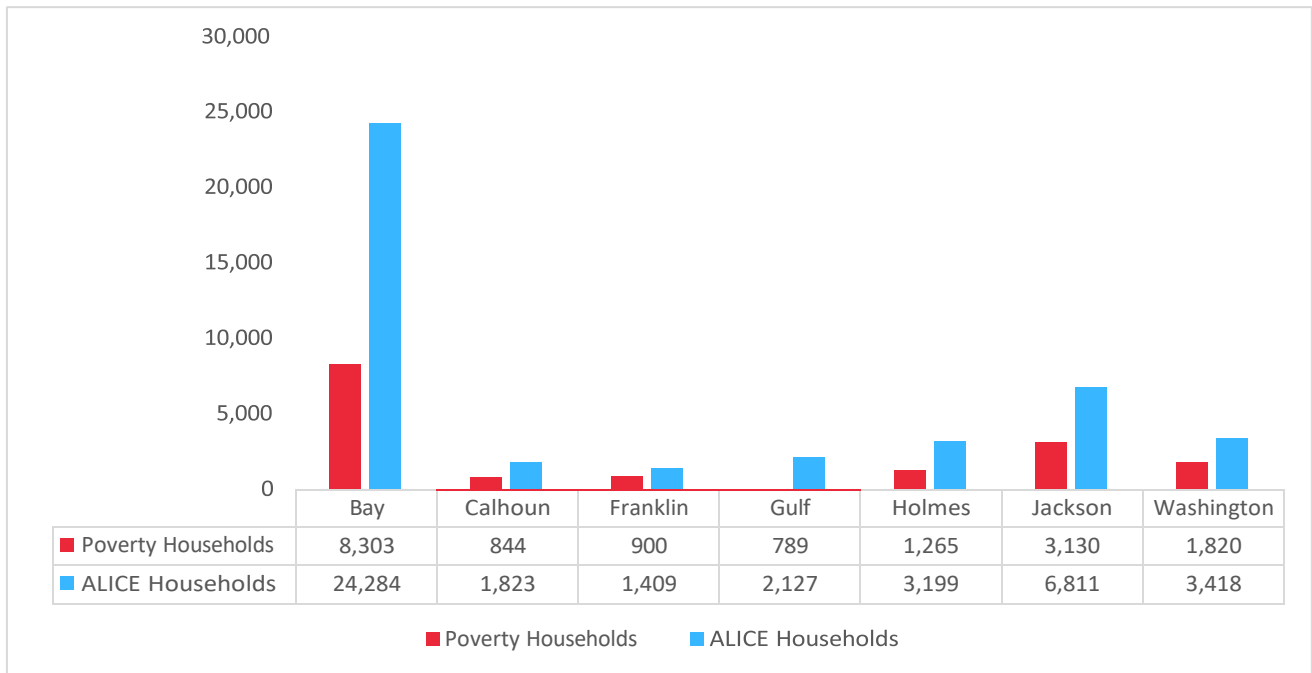
Source: United for ALICE, 2022.

*ALICE Households earned above the FPL but not enough to afford the basics in the communities where they live.

**% Below ALICE Threshold is Poverty Households + ALICE Households divided by total number of households.

The 2022 ALICE data reveals that a considerable number of working families in various Florida counties are experiencing financial hardship, despite being above the Federal Poverty Level (FPL). The data reveals that a significant portion of households in the seven counties face financial challenges, despite not being officially classified as poor. These households struggle to afford necessities like housing, childcare, food, transportation, and healthcare, even though they are employed, the federal poverty guidelines do not accurately reflect the full cost of living in these areas. Targeted assistance and initiatives are necessary to support these families and help them achieve financial stability.

FIGURE 2 POVERTY AND ALICE HOUSEHOLDS BY COUNTY



Source: United for ALICE, 2022.

*ALICE Households earned above the FPL but not enough to afford the basics in the communities where they live.

**Percent Below ALICE Threshold is Poverty Households + ALICE Households divided by total number of households.

Households and Family Composition

The table shows household statistics for the seven Panhandle counties forming the ELCNWF as well as totals and statewide Florida numbers. Across the seven counties, there are a total of 122,579 households, 57,552 married couples, 42,669 non-family households, and 172,109 housing units. The average family size is 2.91 persons and average household size is 2.50. Bay County has the most households at 74,678, while Calhoun has the fewest at 4,448. Calhoun County has the highest average family size of 3.55, and Jackson County has the highest average household size of 3.03.

The county averages are all slightly lower than the statewide Florida averages for family and household size.

TABLE 9 HOUSEHOLDS AND FAMILY COMPOSITION

County	All Households	Married	Non-Family	Housing Units	Average Family Size	Average Household Size
Bay	74,678	35,360	25,924	108,675	2.91	2.39
Calhoun	4,448	1,971	1,687	5,668	3.55	2.69
Franklin	4,761	2,163	1,798	8,561	2.79	2.25
Gulf	5,648	2,858	1,931	9,363	2.67	2.19
Holmes	7,069	3,224	2,433	8,661	3.14	2.52
Jackson	16,880	7,578	6,043	20,150	2.40	3.03
Washington	9,095	4,398	2,853	11,031	2.89	2.45
Total	122,579	57,552	42,669	172,109	2.91	2.50
Florida	8,157,420	3,815,705	2,882,929	10,257,426	3.16	2.57

Source: 2022 American Community Survey Five Year Estimates.

Source: World Population Review.

Homeowners and Renters

The seven Northwest Florida counties have higher homeownership rates and lower renter rates compared to the state average, with married households having the highest homeownership rates and lowest renter rates, while non-family households have lower homeownership rates and higher renter rates. Between 68.6 and 80.7 percent of all households in the seven counties are homeowners and between 19.3 and 31.4 percent are renters.

TABLE 10 HOMEOWNERS AND RENTERS

County	All Households	Married	Non-Family
Homeowners			
Bay	68.6%	80.8%	60.3%
Calhoun	76.6%	93.0%	62.4%
Franklin	80.7%	91.2%	74.7%
Gulf	78.6%	86.3%	75.8%
Holmes	76.5%	84.1%	75.6%
Jackson	74.0%	84.1%	67.9%
Washington	78.5%	85.9%	74.2%
Florida	66.5%	79.3%	57.1%
Renters			
Bay	31.4%	19.2%	39.7%
Calhoun	23.4%	7.0%	37.6%
Franklin	19.3%	8.8%	25.3%
Gulf	21.4%	13.7%	24.2%
Holmes	23.5%	15.9%	24.4%
Jackson	26.0%	15.9%	32.1%
Washington	21.6%	14.1%	25.8%
Florida	33.5%	20.7%	42.9%

Source: World Population Review.

Educational Attainment – Degree Attainment for Adults

The educational attainment in the seven counties ranges considerably. Florida has a higher percentage of individuals with Bachelor and graduate degrees than the seven counties. The analysis of educational attainment levels in Florida counties reveals significant differences. Bay County has the highest percentage of residents with bachelor's and graduate degrees, while Calhoun County has the highest percentage of residents who have not completed high school.

There are disparities in educational attainment levels among different racial/ethnic groups across three Florida counties: Bay, Calhoun, and Franklin. While high school graduation rates are relatively high for most groups, bachelor's degree attainment rates vary significantly, with some groups consistently outperforming others. The data highlights the need for targeted efforts to improve educational outcomes and reduce inequalities among diverse populations within these counties. See **Appendix B** for educational attainment detailed by race and county.

TABLE 11 EDUCATIONAL ATTAINMENT

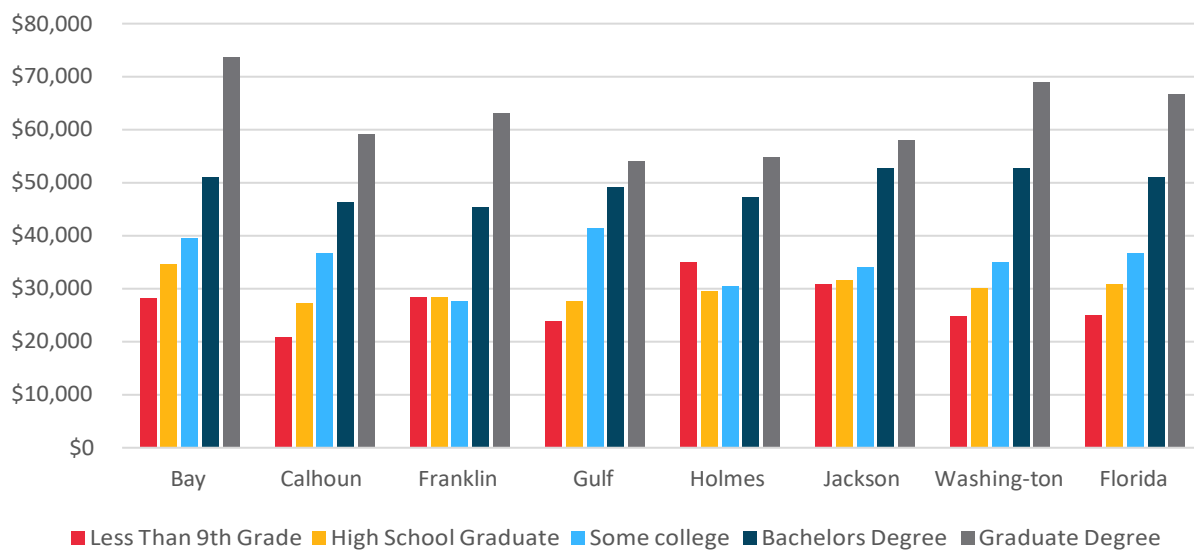
Education Attained	Bay	Calhoun	Franklin	Gulf	Holmes	Jackson	Washington	Florida
Less Than 9 th Grade	3.2%	6.9%	6.1%	4.0%	4.5%	4.7%	4.8%	4.4%
9 th to 12 th Grade	6.4%	13.8%	13.6%	10.3%	12.8%	11.1%	12.1%	6.6%
High School Graduate	28.1%	42.0%	32.2%	34.1%	45.7%	39.7%	42.6%	27.9%
Some college	23.9%	20.8%	19.6%	21.0%	20.8%	21.8%	21.9%	19.5%
Associate degree	11.7%	5.5%	7.6%	9.2%	5.2%	8.9%	6.1%	10.1%
Bachelor's Degree	17.2%	7.7%	11.5%	12.8%	7.7%	8.3%	7.1%	19.8%
Graduate Degree	9.5%	3.4%	9.4%	8.6%	3.3%	5.5%	5.3%	11.7%

Source: World Population Review (2024); American Community Survey Five Year Estimates (2018-2022).

Average Income by Level of Education

Average income varies by education level and by county. Average incomes ranged by \$10,224 from \$30,813 (Franklin) to \$41,037 (Bay). Six of the seven counties' average income was lower than the Florida average of \$38,669. Only Bay County's average income was higher than the Florida statewide average. The data shows a clear positive relationship between education level and average income across Florida counties and the state. Bay County has the highest average incomes, while the lowest varies by education level. The data highlights the importance of education in determining income and reveals disparities among counties.

FIGURE 3 INCOME BY EDUCATION



Education Level	Bay	Calhoun	Franklin	Gulf	Holmes	Jackson	Washington	Florida
Overall Average	\$41,037	\$31,334	\$30,813	\$38,134	\$34,273	\$35,590	\$35,009	\$38,669
Less Than 9 th Grade	\$28,202	\$20,792	\$28,329	\$23,859	\$35,073	\$30,851	\$24,908	\$24,999
High School Graduate	\$34,634	\$27,300	\$28,448	\$27,578	\$29,504	\$31,545	\$30,015	\$30,855
Some college	\$39,489	\$36,705	\$27,614	\$41,495	\$30,504	\$34,025	\$35,008	\$36,627
Bachelor's Degree	\$51,077	\$46,250	\$45,446	\$49,079	\$47,210	\$52,747	\$52,763	\$51,092
Graduate Degree	\$73,688	\$59,157	\$63,068	\$54,052	\$54,750	\$58,056	\$68,897	\$66,765

Source: World Population Review.

The educational attainment levels and income demographics across the seven counties reveal significant disparities that impact access to high-quality early learning opportunities. Several counties have lower percentages of residents with bachelor's or advanced degrees compared to statewide averages. Lower educational attainment often correlates with lower incomes, making it more challenging for families to afford childcare and early education that promote kindergarten readiness. Having fewer educated professionals also makes it difficult to recruit and retain a qualified early childhood workforce crucial for providing high-quality care and instruction.

Income inequality further exacerbates these challenges, as rural counties like Calhoun, Holmes and Jackson exhibit the lowest median household and per capita incomes. Lower family incomes severely restrict the ability to pay for childcare and preschool that support school readiness. The ALICE data also highlighted a substantial number of employed yet financially constrained households struggling to afford basic needs like childcare. Other demographic factors like racial/ethnic composition, mobility rates, and the prevalence of single-parent or non-traditional families also influence the demand for subsidized services and alternative childcare arrangements. Areas with higher poverty rates among minority populations may require targeted outreach. The overall demographic landscape illuminates the need for strategies increasing funding, supporting the workforce, promoting economic stability, and tailoring services to the unique needs of Northwest Florida's diverse communities.

Early Learning Coalition of Northwest Florida

The ELCNWF is an organization serving the seven-county region in Northwest Florida with the mission of ensuring all children receive high-quality early childhood education to enter kindergarten fully prepared. As the single-entry point for Florida's free VPK program and subsidized school readiness childcare, the ELCNWF plays a critical role in expanding access while empowering parents as their child's first teacher. Guided by values of tenacity, innovation, humility and fierce advocacy, their vision is for a committed team of children, parents, professionals, and volunteers to create a reality where every child receives world-class early learning and care. They execute this mission through responsible administration of funding, supporting early educator professional development, facilitating access to community resources for family self-sufficiency, and ensuring successful implementation of comprehensive early education programs - all while helping parents navigate the many choices and demands of early childhood.

ELCNWF Target Population

This table defines the size of ELCNWF's target child population as 9 and under. As shown in the table below, the seven counties forming the Early Learning Coalition for Northwest Florida have a total of 33,801 children nine



years old or younger or 10.9 percent of the total population. Composed of **3,247** children less than one year old, **13,156** who are between one and four years old and **17,398** who are between five and nine years old or younger. The table below breaks this out by county and as a percentage of total population by age group and county.

TABLE 12 POPULATION BY COUNTY AND AGE GROUPS

	<1		1-4		5-9		Nine or younger		Total County Population	
	#	%	#	%	#	%	#	%	#	%
Bay	1,987	1.1%	7,937	4.4%	10,456	5.8%	20,380	11.3%	180,774	100%
Calhoun	117	0.9%	539	3.9%	716	5.2%	1,372	10.0%	13,690	100%
Franklin	88	0.7%	383	3.1%	512	4.1%	983	7.9%	12,501	100%
Gulf	99	0.7%	522	3.5%	806	5.4%	1,427	9.5%	15,025	100%
Holmes	185	0.9%	829	4.2%	1,103	5.6%	2,117	10.7%	19,724	100%
Jackson	506	1.1%	1,938	4.1%	2,441	5.2%	4,885	10.3%	47,322	100%
Washington	265	1.1%	1,008	4.0%	1,364	5.5%	2,637	10.6%	24,970	100%
Total	3,247	1.0%	13,156	4.2%	17,398	5.5%	33,801	10.8%	314,006	100%

Source: Florida Health Charts – Population Estimates Query System, 2022.

https://www.flhealthcharts.gov/FLQUERY_New/Population/Count.

Key Programs and Services

The Early Learning Coalitions (ELCs) in Florida manage three key programs: School Readiness, Voluntary Prekindergarten (VPK), and Child Care Resource and Referral (CCR&R). In addition to these core services, the ELCs offer a wide range of programs and initiatives designed to improve the quality of early learning experiences, strengthen family engagement, facilitate developmental screening and inclusion, deliver professional development opportunities for providers, and provide financial assistance. These comprehensive efforts have positively influenced the lives of thousands of children, families, and early childhood professionals across the state. Some of these larger programs are described here for context.

School Readiness

The Florida School Readiness Program provides financial assistance in the form of childcare subsidies to low-income families for early childhood education and care, aiming to support children's development, school readiness, and parental employment or education. Administered by the Florida Office of Early Learning and Early Learning Coalitions of Northwest Florida, the program serves working families with children under 13 (or up to 19 for those with special needs) who meet income and other eligibility criteria. Eligible families receive subsidies for childcare and early education services provided by approved centers, homes, and schools. The program focuses

on continuous quality improvement, developmental screening, and parent engagement to promote children's learning and development.

Voluntary Pre-Kindergarten

The Florida Voluntary Prekindergarten (VPK) program is a free, state-funded initiative that provides high-quality early learning experiences to prepare four-year-old children for kindergarten and future success. Established in 2005, the program is open to all Florida residents who turn four by September 1 of the school year. VPK offers a school-year option with 540 instructional hours and a summer program with 300 hours, delivered by approved public schools, private centers, and family childcare homes. Providers follow a developmentally appropriate curriculum aligned with state standards, and instructors must hold at least a CDA credential. Children's progress and kindergarten readiness are assessed using standardized tools.

CCR&R

Child Care Resource and Referral (CCR&R) supports all Florida families at all income levels by offering guidance on identifying high-quality childcare environments, maintaining a database of legally operating childcare providers, and providing customized childcare listings that best fit each family's needs. CCR&R also assists with School Readiness and Voluntary Prekindergarten applications, educates families about children's basic needs, financial assistance options, community resources, and other agencies that support family well-being. Additionally, CCR&R connects families to specialists and resources for supporting children with special needs and shares resources tailored to the needs of military families.

Developmental Screenings & Warm Line

The Early Learning Coalition of Northwest Florida uses the Ages and Stages Questionnaire (ASQ-3) to screen children's development across communication, motor skills, problem-solving, and social abilities based on parent observations. If delays are detected, referrals are made for further evaluation through programs like Child Find, with family advocates supporting parents through this process. Care providers also receive a Child Support Plan with activities targeting the child's areas of need identified in the screening. Every Early Learning Coalition in Florida operates a Warm Line service staffed by inclusion coordinators. This Warm Line provides consultations to parents and childcare providers regarding disabilities and special needs for children birth to age 5. The inclusion coordinators support developmental screenings and provide referrals when delays are identified. They respond after a screening flags areas of concern or via direct Warm Line calls to the coalition. Their role is to support providers and families through technical assistance, plan interventions for children requiring extra supports, and facilitate early intervention services prior to the child entering kindergarten. By offering this Warm Line, the coalitions help connect young children to inclusive services and resources for their special health and developmental needs.

Provider and Teacher grants

The Early Learning Coalitions (ELCs) played a crucial role in supporting early learning providers and teachers across Florida in FY 2022-23. They offered a wide range of professional development

opportunities, including CLASS-focused training, infant/toddler specialist support, and comprehensive online and in-person courses. Financial assistance is provided through wage incentives, educational scholarships, grants for professional development programs, and bonuses to enhance childcare quality. The ELCs also participated in large-scale initiatives funded by the American Rescue Plan Act (ARPA), such as the Build a World Class Workforce and Strengthen Adult-Child Interaction programs, which aimed to support providers and staff impacted by workforce challenges. These efforts focused on improving teacher-child interactions, implementing effective business and leadership practices, and enhancing child assessment and screening reliability.

Example-ARPA Build a World Class Workforce

The Early Learning Coalition (ELC) of Northwest Florida supported the professional development of early childhood educators through the professional learning element of the ARPA Build a World-Class Workforce grant funds. The focus was on providing quality CLASS-focused training, utilizing resources from the Department of Children and Families (DCF), the Florida Department of Education (FDOE), and Teachstone. This training equipped teachers with new knowledge and techniques to enhance the quality of care they provide to children and families. The ELC of Northwest Florida awarded a total of \$421,672.71 in stipends to 255 early learning professionals. Furthermore, childcare business owners had the opportunity to apply for grants of up to \$19,800 to develop their own 24-hour professional development programs. In total, 24 grants were awarded, amounting to \$453,250.

Key Programs and Services Data

The Early Learning Coalition of Northwest Florida has been a driving force in promoting accessible, high-quality early childhood education and supporting families with childcare needs throughout the region. During the fiscal year 2022-2023, the organization made significant strides in its mission, positively impacting the lives of thousands of children and their families while contributing to the overall economic well-being of the community. The following summary provides an overview of the Early Learning Coalition's services last fiscal year:

- The Early Learning Coalition served a total of **3,758** children in their School Readiness program in fiscal year 2023.
- **1,773** children (from 1,746 families) participated in the Voluntary Pre-K (VPK) program, which is designed for 4-year-olds.
- The Early Learning Coalition contracted with **195** providers, out of which **123** were School Readiness providers and **72** were VPK providers.
- The Early Learning Coalition's programs and services had an estimated **\$39** million direct spend impact on the local economy.

The first table, "Age," breaks down the number of children enrolled in the School Readiness program during the month of March by age category and county highlighting enrollment patterns within and across the seven counties. The second table, "School Readiness Providers by County,"

presents the number and types of providers participating in the program in each county. This information sheds light on the supply side of the School Readiness program, revealing the variety and geographic distribution of providers. Note that five of the 7 counties have 5 or less providers in the entire county for all ages. Additional service tables are in **Appendix B**.

Based on the population estimates and March 2024 enrollment the Early Learning Coalition is supporting 9.9 percent of Northwest Florida Children in Early Learning Programs. This would include 9.8 percent of 0–5-year-olds in school readiness, 2.9 percent of 5–9-year-olds in school readiness, and 47.3 percent of children in VPK.

TABLE 13 PERCENT OF CHILDREN SERVED BY THE ELCNWF BY AGE AND COUNTY

Age Group	March Enrollment	Total Child Population	%
SR 0-5	1,605	16,403	9.8%
SR School Aged	504	17,398	2.9%
VPK- 4-year-olds	1,556	3,289	47.3%
All NWF Children	3,665	37,090	9.9%

TABLE 14 SCHOOL READINESS ENROLLMENT BY AGE AND COUNTY – MONTH OF MARCH 2024

Age	Bay County	Calhoun	Franklin	Gulf	Holmes	Jackson	Washington	Total
Infant	65	2	0	0	5	32	16	120
One Year Old	164	8	3	4	14	68	19	280
Two Years Old	203	8	5	5	20	76	30	347
Three Years Old	218	7	9	6	23	85	31	379
Four Years Old	180	11	3	3	15	63	22	297
Five Years Old	105	9	2	1	13	38	14	182
School Age	235	17	2	0	52	144	54	504
Special Needs	0	0	0	0	0	0	0	0
Total	1,170	62	24	19	142	506	186	2,109

Source: ELCNWF, March 31, 2024.

TABLE 15 SCHOOL READINESS PROVIDERS BY COUNTY – MARCH 2024

County	Center	Head Start	Family Child Care Home	School Age Program	Faith-based Exempt	Public School Charter School	Private School	Total
Bay	40	4	4	5	1	0	0	54
Calhoun	2	1	0	0	0	0	0	3
Franklin	1	1	0	0	0	0	0	2
Gulf	1	2	0	0	0	0	0	3
Holmes	5	0	0	0	0	0	0	5
Jackson	14	0	0	0	0	0	0	15
Washington	4	0	0	1	0	0	0	4
Total	67	8	4	5	1	0	0	86

Source: ELCNWF, March 31, 2024.

TABLE 16 VPK ENROLLMENT BY COUNTY – FEBRUARY 2024 AND MARCH 2024

Program Type	Bay County	Calhoun	Franklin	Gulf	Holmes	Jackson	Washington	Total
School Based								
February 2024	503	28	58	28	85	168	132	1,002
March 2024	498	28	57	28	82	167	131	991
Non-School Based								
February 2024	358	26	0	47	30	97	13	571
March 2024	355	250		45	29	98	13	565
February 2024 Total	861	54	58	75	115	265	145	1,573
March 2024 Total	853	53	57	73	111	265	144	1,556

Source: ELCNWF, February 29, 2024, and March 31, 2024.

TABLE 17 VPK PROVIDERS BY TYPE AND COUNTY

County	Center	Head Start	Family Child Care Home	School Age Program	Faith-based Exempt	Public School Charter School	Private School	Total
Bay	21	2	0	0	0	15	1	39
Calhoun	1	1	0	0	0	3	0	5
Franklin	0	0	0	0	0	2	0	2
Gulf	1	2	0	0	0	2	0	5
Holmes	3	0	0	0	0	4	0	7
Jackson	9	0	0	0	0	5	0	14
Washington	1	0	0	0	0	2	0	3
Total	36	5	0	0	0	33	1	75

Source: ELCNWF, February 29, 2024, and March 31, 2024.

Funding

Early Learning Coalitions operate within federal, state, and local policy and funding contexts that shape local service delivery and community impact. Key policy and funding levers include the federal Childcare Development Block Grant, Florida statutes and rules governing early learning programs, the Florida Department of Education's Office of Early Learning, and some local match programs, with more than 98% of funding coming from FDOE.

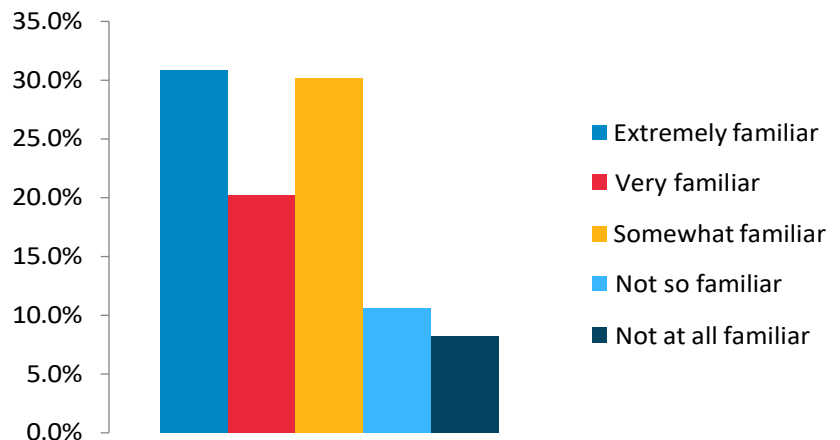
Communications

The survey aimed to gauge public awareness levels about the Early Learning Coalition of northwest Florida, identify trusted sources of information within the community, assess website usage patterns, and understand the extent of stakeholder engagement. By gathering data in these key areas, the ELCNWF sought to pinpoint strengths and potential areas for improvement in their outreach and communications strategies.

Public Awareness:

Around 51 percent of respondents were highly familiar with ELCNWF, while around 19 percent had little to no familiarity. Familiarity levels varied across counties, with Holmes and Jackson counties having the highest percentages indicating they were "Extremely familiar," while Gulf and Calhoun

How familiar are you with the Early Learning Coalition of Northwest Florida?

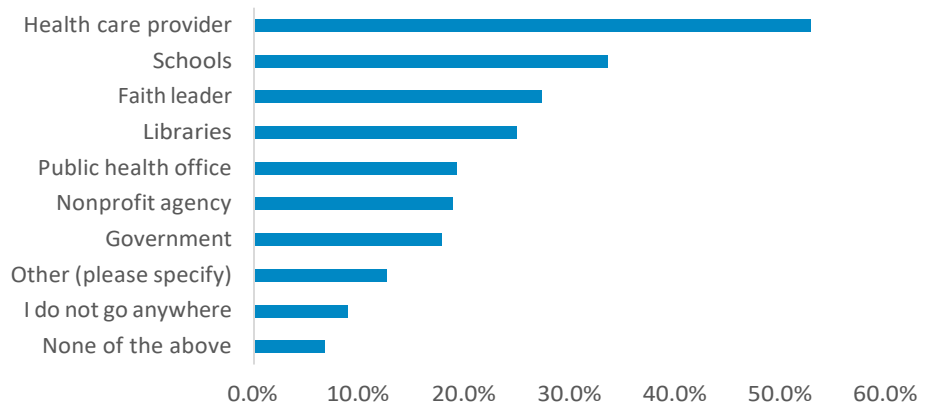


counties had the highest percentages stating, "Not at all familiar."

Many community members referenced the local FAST (Florida Assessment of Student Thinking) as "the" measure for tracking progress in early learning initiatives.

These scores were frequently mentioned across interviews, focus groups, and open-ended survey comments, indicating their prominence as a key metric that stakeholders have awareness of and monitor.

Where do you go for information that you can trust?



Other Trusted Information Sources:

The survey identified healthcare providers, schools, faith leaders, libraries, and public health offices as the top trusted sources for information. However, the internet, including social media,

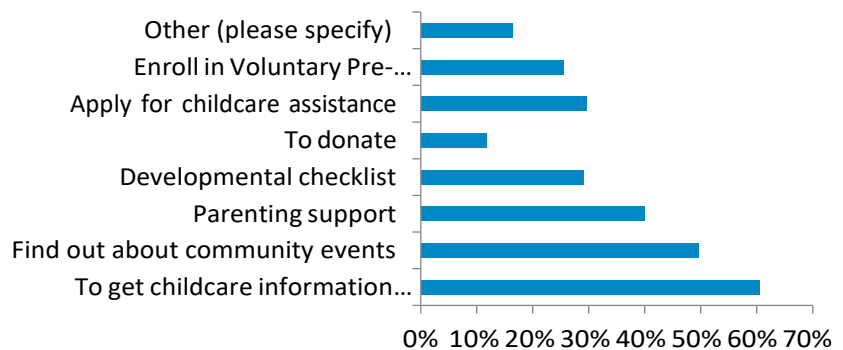
websites, and online resources, also played a significant role as a trusted source for around 60% of respondents. Notably, some respondents did not identify any trusted sources for information.

Understanding these trusted channels is important for supporting effective public communication campaigns by the ELC. Utilizing the trusted sources can help ensure messaging reaches the intended audiences through credible channels they rely on for information. Additionally, recognizing that a segment does not identify trusted sources points to the need for alternative outreach strategies to engage those groups.

Website Usage:

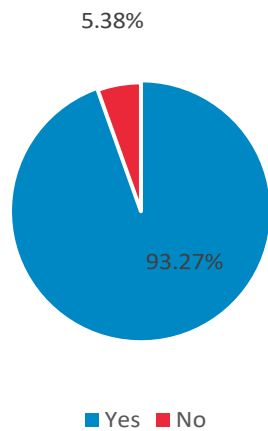
The main purposes of website usage included obtaining childcare referrals, learning about community events, accessing parenting support resources, applying for childcare assistance programs, enrolling in VPK pre-kindergarten, and getting developmental checklists. Over **52 percent** of respondents used the ELCNWF website (elcnwf.org). Respondents found the

For what purpose do you use the ELC Website?

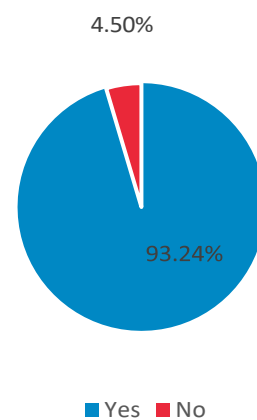


website to be understandable, and effective for locating information by over **93 percent** of users.

I can find what I am looking for

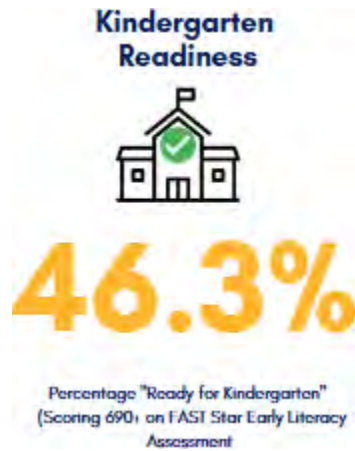


It is clear and understandable



Current Challenges and Needs in Northwest Florida

The Early Learning Coalition of Northwest Florida's community needs assessment has revealed a complex array of factors influencing early childhood development and wellbeing in the region. This



section of the report provides an in-depth analysis of the current situation and needs, drawing upon data from surveys, focus groups, interviews, and secondary research. By examining issues such as kindergarten readiness, child wellness, access to mental and behavioral health services, affordability and availability of childcare, community resources, and support for family caregivers, the analysis aims to paint a comprehensive picture of the challenges faced by children, families, childcare providers, and the broader community. The analysis also explores the impact of the COVID-19 pandemic, the role of the Voluntary Prekindergarten (VPK) program, and the unique needs of special populations such as military families and grandparents providing childcare. By synthesizing these findings and

highlighting the perspectives of key stakeholders, this section provides a roadmap for the Early Learning Coalition of Northwest Florida and its partners to strengthen the early learning system, address disparities, and ensure that all children in the region can thrive.

Nurturing Health and Ready for Kindergarten Children

In Northwest Florida, several factors influence a child's development and readiness for kindergarten, including access to quality early learning programs, proper nutrition, developmental issues, and support with behavior and emotions. This section of the community needs assessment focuses on the children of Northwest Florida, examining the challenges they face and the support they need for healthy development and wellbeing. By analyzing data on kindergarten readiness, the impact of the Voluntary Prekindergarten (VPK) program, child wellness, food insecurity, and access to mental and behavioral health services, the assessment aims to identify areas where targeted efforts can make a significant difference in the lives of young children. The findings emphasize the importance of early intervention, addressing disparities, and ensuring equitable access to resources and services. Understanding the unique needs and challenges of Northwest Florida's children is crucial for creating positive change and investing in the region's future by promoting their healthy growth, learning, and overall wellbeing.

Kindergarten Readiness

Florida state law mandates that all kindergarten students undergo a statewide screening within the first 30 days of the school year. This screening provides crucial insights into a child's school readiness, enabling teachers to tailor their instruction to meet each student's unique needs and offering valuable information to parents. In previous years, the Florida Kindergarten Readiness Screener (FLKRS) served as the primary screening tool. However, starting from the 2022-2023 school year, Florida implemented a new statewide Coordinated Screening and Progress Monitoring System called the Florida Assessment of Student Thinking (FAST) Star Early Literacy. FAST Star Early Literacy has now replaced FLKRS as the official kindergarten screener. In 2023, 51percent of incoming kindergarten students across the state achieved scores indicating they were "ready for kindergarten."

TABLE 18 FAST STAR EARLY LITERACY SCORES

	Children	Score +690	"Ready for Kindergarten"
BAY	2034	962	47.5%
CALHOUN	160	90	57.0%
FRANKLIN	90	36	42.2%
GULF	111	44	38.9%
HOLMES	220	89	40.0%
JACKSON	519	215	41.0%
WASHINGTON	250	126	51.1%
NORTHWEST FLORIDA	3384	1562	46.3%

Source: Florida Department of Education (Fall 2023)

Scores varied considerably by school. Bay County data is included here with the largest range in scores from 25.0 percent to 86.2 percent. This indicates that social economic factors may play a significant role in children’s readiness for school.

TABLE 19 BAY COUNTY FAST SCORES BY SCHOOL

School #	School Name	Number of Test Takers	Number "Ready for Kindergarten"	Total County Percentage "Ready for Kindergarten"	Percentage "Ready for Kindergarten"
521	PATRONIS ELEMENTARY SCHOOL	102	52		51.0%
251	WALLER ELEMENTARY SCHOOL	77	27		35.1%
391	OSCAR PATTERSON ACADEMY	89	23		25.8%
541	DEANE BOZEMAN SCHOOL	53	34		64.2%
81	HUTCHISON BEACH ELEMENTARY SCHOOL	100	45		45.0%
91	CEDAR GROVE ELEMENTARY SCHOOL	83	20		24.1%
461	DEER POINT ELEMENTARY SCHOOL	98	45		45.9%
2701	RISING LEADERS ACADEMY	36	25		69.4%
801	PALM BAY ELEMENTARY SCHOOL	60	22		36.7%
211	PARKER ELEMENTARY SCHOOL	72	32		44.4%
101	CALLAWAY ELEMENTARY SCHOOL	78	28		35.9%
221	SOUTHPORT ELEMENTARY SCHOOL	89	30		33.7%

School #	School Name	Number of Test Takers	Number "Ready for Kindergarten"	Total County Percentage "Ready for Kindergarten"	Percentage "Ready for Kindergarten"
701	BAY HAVEN CHARTER ACADEMY	124	79		63.7%
171	LYNN HAVEN ELEMENTARY SCHOOL	112	54		48.2%
241	ST. ANDREW SCHOOL AT OAKLAND TERRACE	*	*		*
131	LUCILLE MOORE ELEMENTARY SCHOOL	76	19		25.0%
2711	UNIVERSITY ACADEMY SABL INC	58	50		86.2%
511	TOMMY SMITH ELEMENTARY SCHOOL	103	46		44.7%
262	WEST BAY ELEMENTARY SCHOOL	50	25		50.0%
571	BREAKFAST POINT ACADEMY	82	40		48.8%
111	MERRIAM CHERRY STREET ELEM.	44	15		34.1%
611	A. GARY WALSHINGHAM ACADEMY	84	57		67.9%
501	TYNDALL ACADEMY	99	55		55.6%
471	NORTHSIDE ELEMENTARY SCHOOL	63	29		46.0%
751	NORTH BAY HAVEN CHARTER ACADEMY ES	108	76		70.4%
151	HILAND PARK ELEMENTARY SCHOOL	94	34		36.2%
	TOTAL	2,034	962	47.3%	Range=25.0%-86.2%
	TOTAL ELCNWF	3,384	1,562	46.2%	

Source: Florida Department of Education (FLDOE) 2023

Voluntary Pre-Kindergarten (VPK) participation vs non-VPK

The data provided in the table below, which is from Fall 2023, compares the kindergarten readiness scores of students in Florida and its districts who completed the Voluntary Prekindergarten (VPK) program (attending 70 percent or more of the program hours) to those who did not attend VPK or were unmatched to a VPK record. Statewide, 62 percent of VPK completers scored 690 or higher on the kindergarten readiness assessment, compared to only 37 percent of students who did not attend VPK or were unmatched to a VPK record, suggesting that attending the VPK program is associated with higher kindergarten readiness scores.

In all districts, the percentage of students scoring 690 or higher was greater for VPK completers than for those who did not attend VPK or were unmatched to a VPK program, with the difference in percentages ranging from 12 percentage points in Holmes to 30 percentage points in Washington. The number of test-takers varied widely across districts, with Bay having the highest number of VPK completers (628) and non-VPK/unmatched students (1,145), while Franklin had the lowest number of VPK completers (36) and non-VPK/unmatched students (46). Overall, the Fall 2023 data suggests that completing the VPK program is associated with higher kindergarten readiness scores across Florida and its districts.

TABLE 20 VPK VS NON-VPK FAST SCORES

District Number	District Name	VPK Completers (Attended 70% or more of VPK Program Hours)			Kindergarten Students that did not Attend VPK/Unmatched to a VPK Record		
		Number of Test Takers	"Ready for Kindergarten" Scoring 690+	"Ready for Kindergarten" Scoring 690+	Number of Test Takers	"Ready for Kindergarten" Scoring 690+	"Ready for Kindergarten" Scoring 690+
00	FLORIDA	92,794	57,154	62%	79,325	29,012	37%
03	BAY	628	359	57%	1,145	442	39%
07	CALHOUN	31	22	71%	127	62	49%
19	FRANKLIN	36	22	61%	46	17	37%
23	GULF	45	31	69%	79	31	39%
30	HOLMES	99	47	47%	105	37	35%
32	JACKSON	219	124	57%	272	104	38%
67	WASHINGTON	114	67	59%	139	40	29%

Source: Florida Department of Education (FLDOE) 2023

The data provided compares the kindergarten readiness scores of students who completed the Voluntary Prekindergarten (VPK) program (attending 70 percent or more of the program hours) to those who did not attend VPK or were unmatched to a VPK record in Florida and its districts.

Increasing access to quality early learning programs and supporting families in the transition to kindergarten are crucial for promoting school readiness.

Barriers to participation in Voluntary Pre-Kindergarten (VPK)

There are several reasons why not all children are enrolled:

1. Limited availability and accessibility of VPK programs in some counties.
“There is little VPK availability in Bay Co. with lengthy waitlists.”
2. Scheduling conflicts for working parents.
Limited pre-K/VPK hours often conflict with working parents' full-day schedules. The part-time nature of many VPK programs may not align with the childcare needs of parents who work full-time.
3. Cost of extended care beyond VPK hours.
Some parents faced difficulties finding schools that accommodate part-time VPK hours without requiring full-time attendance and additional costs. The need to pay for wraparound care beyond the free VPK hours is a barrier for some families.
4. Lack of awareness or information about VPK.
5. Preference for other early learning arrangements.
Some families may choose alternative settings like home-based care, faith-based programs, or private preschools instead of VPK based on factors like location, schedule, educational philosophy, or cultural preferences.

VPK participation positively impacts kindergarten readiness in Florida, with VPK participants consistently outperforming non-participants across all districts and statewide. However, the extent of the performance gap varies by district and by school, suggesting that VPK program effectiveness and other readiness factors may differ regionally. Despite the benefits of VPK, readiness gaps persist, indicating that factors beyond VPK also influence readiness. To improve overall kindergarten readiness in Florida, ongoing efforts must focus on enrollment, addressing readiness gaps, and considering other early childhood development and learning factors.

Child Wellness and Food Insecurity

Food insecurity emerged as a particularly alarming issue, with over one-third of local parents surveyed expressing concerns about having enough food for their families, and slightly higher rates among those with children under 5 years old (36.9 percent). These findings align with a 2022 U.S. Department of Agriculture report showing a sharp national rise in hunger, impacting 44.2 million Americans including over thirteen million children (USDA, 2023). Furthermore, the study identified that limited access to healthy, nutritious foods was a significant barrier to promoting healthy eating habits among children in early care and education settings.

The data highlight opportunities to embed comprehensive wellness initiatives beginning in early childhood, building on proven models like the "Healthy Way to Grow" (Ramos, 2020) program. This program has effectively helped early care and education centers implement robust wellness policies promoting healthy nutrition, physical activity, and limiting screen time - allowing providers to reinforce core habits critical to childhood development and lifelong wellbeing.

With families struggling to afford adequate nutrition, the needs assessment underscores expanding initiatives that connect households to food assistance while cultivating positive eating behaviors from an early age through programs like "Healthy Way to Grow." The data reveals the importance of nurturing environments that holistically support the whole child. Just as food insecurity undermines learning potential, so too can lack of physical activity, excessive screen time, and failure to develop foundational health habits during the critical early years.

By implementing comprehensive wellness strategies across early learning settings, the Coalition can drive systemic changes empowering all children and families to thrive unburdened by poverty-related issues like hunger. Leveraging proven models and cross-sector partnerships should be part of a comprehensive approach fostering nurturing environments that prevent obesity and promote lifelong wellbeing for Northwest Florida's youngest learners.

Mental, Behavioral, and Social Emotional Health

Access to mental and behavioral health services is a significant challenge in both urban and rural areas, exacerbated by the impacts of Hurricane Michael and the COVID-19 pandemic. The lack of adequate support for children's mental and behavioral health places an additional burden on childcare and early learning providers, who often struggle to address these needs while children are in their care. Children's mental health is often closely tied to the mental health support available for their families. The shortage of community mental health providers is compounded by the hiring of many providers into schools following Hurricane Michael. There are long waitlists for children, and a lack of trauma informed care. Parents, Caretakers, Childcare Providers, Mental Health Professional, and the community all identified this issue during our stakeholder engagement.

Strengthening and Supporting Parent and Caretakers

Early childhood is a crucial stage of development that sets the stage for a child's future success, and families play a critical role in supporting their children's growth and well-being during this time. However, many families in Northwest Florida face challenges in accessing the necessary resources and support to provide optimal care and education for their young children.

To better understand these needs and experiences, a parent/caretaker survey, and parent focus group, was conducted. The results highlight the importance of accessible, affordable, and high-quality early childhood care and education services in supporting families with concrete supports like childcare subsidies and promoting positive child outcomes, while also revealing the need for a broader range of supports, including mental health services, parenting education, and connections to community resources.

What do families say?

The parent/caretaker survey aimed to understand the unique needs and experiences of families with young children under nine years old in Northwest Florida. The survey gathered information about child age, childcare arrangements, parental factors in supporting children's learning and development, and parent concerns.

- Child age: The highest percentage (26.9 percent) of parent respondents had children aged 3-5 years, followed by 9+ years (25.9 percent), 6-9 years (17.5 percent), and 0-2 years (15.6 percent).
- Childcare arrangements: The most common arrangements were parental/at-home care and childcare centers/preschools. However, many families utilized a combination of options, with grandparents and family members often supplementing formal childcare. Childcare availability and affordability challenges were cited.

- County differences: Childcare arrangements varied significantly across counties, due to factors such as availability, affordability, and local preferences. Bay County had the highest percentage

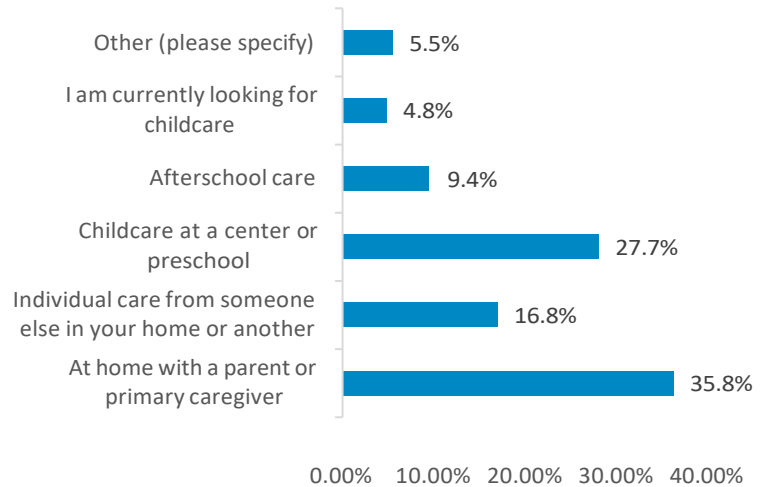
NWF Childcare Arrangements

of childcare center or preschool use (35.8 percent), while Holmes County had the highest percentage of at-home care (72.7 percent).

- Parental factors in supporting child's learning and development: Most parents felt confident in

their ability to support their

child's early learning and development, including reading and math skills, managing behaviors and emotions, and understanding kindergarten expectations. However, there was room for improvement in resource awareness and accessibility, especially for infant and toddler parents.



- Parent concerns:

- Cost of living was a concern for many (74 percent)
- Followed by managing children's technology/media use (54.89 percent)
- Getting parenting skills information (51.7 percent)
- Child's emotional health (51.7 percent)
- Other concerns getting the child to attend school daily (37.5 percent)
- And having enough food (35.1 percent)

Affordability and Availability of Childcare

Affordability and availability of childcare and related services were frequently cited concerns that are deeply interconnected. These challenges impact a wide range of family needs beyond just childcare, from housing and food insecurity to accessing healthcare and developmental services. Access issues include location barriers, waitlists, eligibility restrictions, and a lack of flexible hours to accommodate work schedules. Affordability problems persist for low-income families but also impact higher-income households ineligible for subsidies. An inadequate supply of quality childcare options contributes to availability challenges.

Families in Northwest Florida face substantial challenges in accessing affordable, high-quality childcare, especially for vulnerable populations.

Participants identified affordable quality childcare as the top need, rooted in the substantial gap between childcare's high costs and limited funding support for families. Some parents also faced difficulties finding preschools accommodating part-time VPK without requiring costlier full-time enrollment. Accessing supplemental services like speech therapy, development screenings, and mental health services were cited by parents and early educators alike.

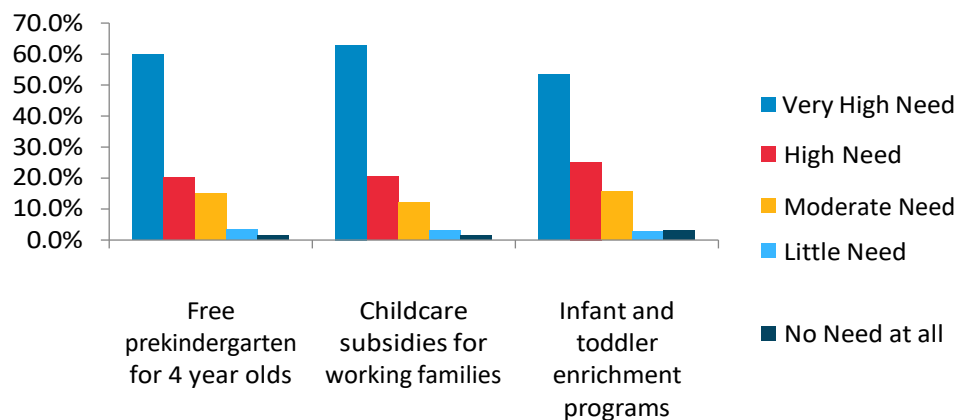
Economic factors such as poverty, food insecurity, and housing instability pose significant challenges to family stability and success. The high cost of childcare is a particularly overwhelming burden for many families, forcing them to make difficult choices between earning an income and paying for care during working hours.

The survey data from all respondents reveals that all three Early Learning program areas: Free prekindergarten

for 4-year-olds, childcare subsidies for working families, and Infant and toddler enrichment programs - are perceived to have a high level of

need by most respondents. The combined percentages of

How would you rate the need for these Early Learning program areas?



"Very High Need" and "High Need" responses range from 78.7 percent to 83.5 percent, with Childcare subsidies for working families and Free prekindergarten for 4-year-olds identified as having a slightly higher level of need compared to Infant and toddler enrichment programs.

The open-ended comments from parents in the survey data reveal a mix of appreciation for existing programs and a clear need for improved access to quality, affordable childcare, and early learning opportunities. Many parents express gratitude for assistance programs like the Early Learning Coalition subsidy program and VPK, which have enabled them to work and support their families. However, several comments highlight concerns about the lack of awareness of available resources, the need for better developmental activities and academic support for children, and the challenges of finding reliable and affordable childcare.

"Thanks for helping parents who would have no other options."

Concrete supports: Subsidized childcare

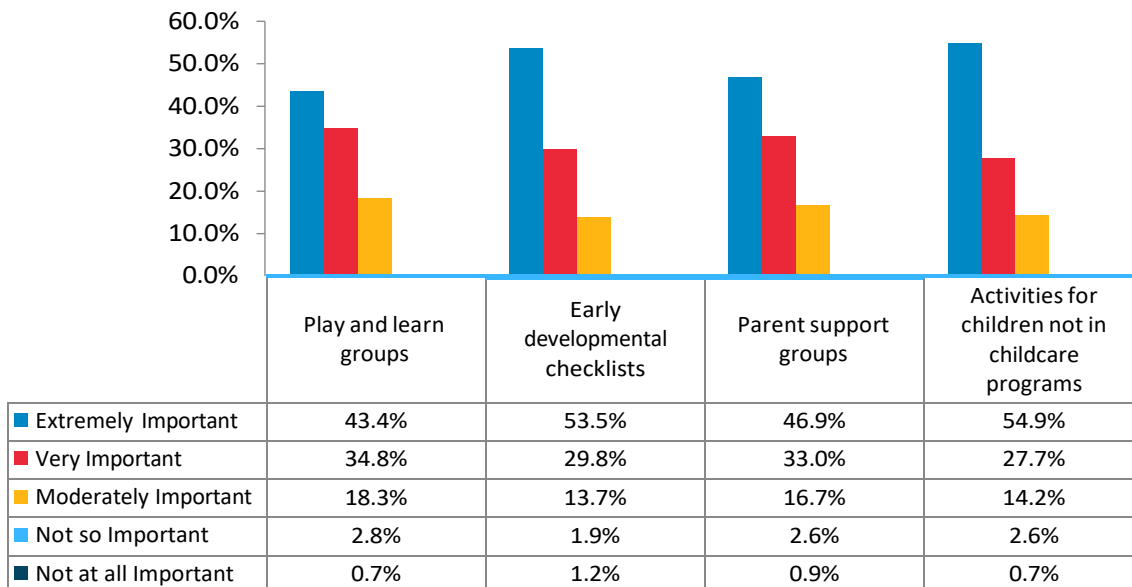
The eligibility criteria for childcare assistance programs can create a "subsidy cliff" that leaves many families in a difficult position. Some families earn too much to qualify for school readiness programs but not enough to afford unsubsidized care. Others may have incomes low enough to be eligible for subsidies but still struggle to pay the required copayments.

Consequently, these subsidy structures create a gap in which some families make too much to receive state support for school readiness programs but not enough to cover their childcare expenses independently. This situation places a significant strain on families, making it challenging for them to achieve financial stability and provide the necessary care and support to ensure their children are prepared for success in school and beyond.

Community Supports: Social Connection, Recreation, and Education

Parents emphasized the importance of community resources, such as community centers, libraries, and parent groups, to support their children's growth and development.

How would you rate the importance of these parent support and education programs?



The survey highlighted the importance of parks, recreation, social activities, and play opportunities for families and children in Northwest Florida. Parks and play areas emerged as the most used community services, with **69.0 percent** of respondents reporting that they typically use these facilities. In the open-ended responses, participants emphasized the value of community activities and events, such as "Downtown Thursday night" gatherings and children-focused events that allow families to engage with one another. Respondents also placed a high priority on recreational and

social activities, with **79.6 percent** rating them as either "Very Important" or "Somewhat Important."

The survey revealed a desire for more community resources and activities for children, including splash pads, arts programs, sports facilities, and library resources/events. Some respondents noted that parks and playgrounds in their communities needed upgrades and improvements, particularly to enhance accessibility for children with special needs or disabilities.

Families have needs extending beyond childcare to include mental health services, parenting education, and connections to essential resources to meet basic needs.

The theme of "Social Connection" also emerged, with participants highlighting the importance of informal community bonds and how people come together to support one another in times of need. These findings underscore the need for continued investment in high-quality, accessible, and inclusive parks, recreation, and play opportunities to support children's development and foster strong community connections in Northwest Florida.

Special Populations- Military families

Thirty-six percent of survey respondents identified as living in active or retired military households in all seven counties. Childcare providers, parents, and the community at large expressed concerns about keeping up with the growth of military families in the area both on the impact on housing and on childcare availability. One childcare provider specifically commented on the challenge of accommodating the growing need for childcare services as the population of military families expands. This situation highlights the importance of considering the unique needs of military families when planning and allocating resources for housing and childcare in communities with a significant military presence, which includes all Northwest Florida. Over one hundred respondents from active or

"Tyndall is growing rapidly, those parents need us, and we aren't prepared to meet that need".

retired military households answered the community survey. 100

percent of the active military household respondents were parents.

Interestingly, the survey data revealed that half (46.5 percent) of respondents from active military households and 24 percent from

Dept. of Defense Child Care Initiatives (Government Accountability Office, 2023)

The Government Accountability Office (GAO) report found that the Department of Defense (DOD) childcare program supports service member readiness by promoting job performance, retention, and financial well-being. DOD ensures quality care through oversight, training, and a new curriculum.

However, affordability and availability remain concerns for some military families. DOD is addressing these issues by expanding facilities, increasing fee assistance, and broadening the pool of eligible community-based providers.

<https://www.gao.gov/assets/gao-23-105518.pdf>

retired military households also identified as early childhood teachers and/or childcare providers themselves. All respondents from active military households were also parents.

The Early Learning Coalition of Northwest Florida must tailor strategies to support the unique childcare and early education needs of military families, a significant portion of the region's population. By partnering with military installations, collaborating with Gold Seal Providers, and actively recruiting military spouses and retired personnel as teachers or business operators, the Coalition might increase access to high-quality care that aligns with the distinctive circumstances of military life. Offering specialized training, support, and targeted recruitment campaigns might tap into the skills and experiences of military-connected individuals, creating a more robust and responsive early learning system that better serves military families while strengthening the overall early childhood education workforce in Northwest Florida.

Special populations - Grandparents

Grandparents play a vital role in supporting working parents and providing childcare for young children in Northwest Florida. The Early Learning Coalition's Community Needs Assessment survey found that many families rely on a combination of childcare options, with grandparents and other family members frequently supplementing formal arrangements like center-based care or preschool. In fact, 16.8 percent of

respondents reported using individual care from someone other than a parent, highlighting the prevalence of care provided by grandparents, family members, or friends. In Calhoun County, this type of care was the most common, with 37.7 percent of respondents citing it as their primary arrangement. In some counties like Calhoun, grandparent or family care was reported as

"There are also many grandparents in the area and having access to take the grandchildren to local activities while the kids are with the grandparents is very helpful."

the most common primary childcare arrangement. Interviews and focus groups further emphasized the importance of grandparents. They are often mentioned as both primary custodians of children and as providers of care to support parents. Grandparents were frequently identified as picking up children from VPK programs and assisting with childcare costs.

The Early Learning Coalition of Northwest Florida might develop targeted strategies to support the significant number of grandparents and other family members who play a crucial caregiving role for young children in the region. The Community Needs Assessment survey and focus groups revealed that grandparent-provided childcare is highly prevalent, with many families relying on this arrangement as their primary or supplemental care option. In some counties like Calhoun, grandparent or family care was reported as the most common primary childcare arrangement.

Given this reality, the ELC might launch a public relations campaign specifically aimed at educating and engaging grandparent and family caregivers. Such a campaign could focus on raising awareness about the importance of quality early learning experiences and the critical role these caregivers play in supporting their grandchildren's development. It could provide information updating them on current kindergarten readiness expectations and how early learning practices have evolved since their own experiences.

Beyond the PR campaign, the ELC might consider partnering with trusted local organizations to reach grandparents where they gather, like senior centers. Developing intergenerational programs, offering flexible training formats, and publicly celebrating grandparent caregivers' contributions could further strengthen the coalition's efforts.

Key Needs for Parents and Caretakers:

Quality and affordable childcare:

Parents emphasize the need for accessible, high-quality childcare that fits within their budget, particularly for infants, toddlers, and children with special needs. The high cost of care and limited subsidy assistance pose significant challenges for many families.

Early learning programs:

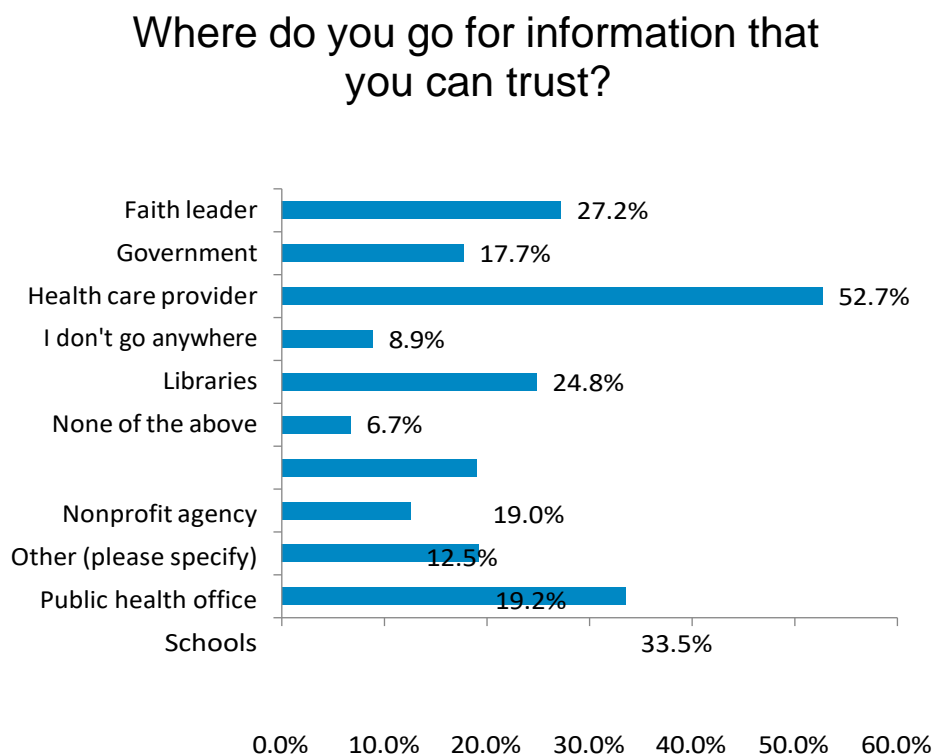
Access to early learning programs, such as free VPK, childcare subsidies, and infant/toddler enrichment programs, is considered a high-need area by most respondents. These programs are crucial for promoting children's development and school readiness.

Community resources and activities:

Parents highlight the importance of community resources and activities that support children's growth and development, such as well-maintained parks, playgrounds, splash pads, arts programs, sports facilities, and library resources/events. These amenities foster learning, social connections, and physical activity.

Awareness of and access to resources:

Improved awareness of and access to available resources, developmental activities, and academic support for children is a key need expressed by parents. Ensuring that families are informed about and can easily access these



resources is crucial for promoting children's well-being.

Support beyond childcare:

Parents recognize the need for a holistic continuum of support that goes beyond childcare, including mental health services, parenting education, and connections to food, housing, and healthcare resources. Addressing these broader needs is essential for promoting overall family stability and well-being.

Support for family caregivers:

Parents express the need for support and resources for grandparents and other family caregivers who often supplement formal childcare arrangements. Recognizing and assisting these essential caregivers is crucial for ensuring that children receive high-quality care in various settings.

Investment in early learning and childcare:

Increased funding and investment in high-quality, accessible, and inclusive early learning and childcare programs is a critical need identified by parents. Adequate resources are necessary to ensure that all children have access to the care and education they need to thrive.

Employment and housing opportunities:

Better employment opportunities and affordable housing are essential for improving overall family stability and well-being. Parents recognize that these broader economic factors have a significant impact on their ability to provide for their children's needs.

Social connection opportunities:

Parents value social connection opportunities through community events and activities that allow families to engage with one another and foster strong community bonds. These connections provide support, reduce isolation, and contribute to a sense of belonging and well-being for both children and parents.

"I am so grateful for ELC without this program I would not be able to work and take care of me and my daughter!"

Cultivating Resilient, Solvent, and Supported Childcare Providers

Childcare business providers in Florida face numerous challenges in operating a sustainable business while providing affordable, high-quality care. These issues include high operational costs, difficulty attracting and retaining skilled staff, a significant funding gap, cost burdens from regulations and requirements, financial disincentives for serving infants and subsidized families, high childcare costs relative to income, low compensation for early education teachers, and pressure from minimum wage increases. These factors make it challenging for childcare businesses to balance the needs of families, staff, and their own financial viability.

What do Childcare Providers say?

Northwest Florida childcare providers echoed the concerns highlighted in a national workforce survey (see sidebar). In our focus group, 30 percent of our participants witnessed childcare closures in the last six months in their community. Childcare providers often cited the current reimbursement rate and staffing shortages as the critical issues.

“Supplies, staff, leases, insurance, and other costs keep going up, but rates stay the same. Nothing is getting cheaper.”

“This means kids do not have continuity – meaning they don’t have the same teacher and consistent experience through the year, because of the teachers’ turnover or leave.” This also means that because of the complicated nature of balancing licensing capacity, staffing, and ratios, it is common for childcare providers to have both a waitlist and empty slots at the same time.

As one childcare owner noted, "It is difficult to recruit and retain quality staff at current reimbursement rates." They explained that staff may leave for better-paying jobs, such as working in seasonal positions during the summer, knowing that they can return to their previous position when needed. "Of course, we need them and will hire them back, it is a huge disadvantage".

Childcare providers also face stress from the demanding nature of their work, as highlighted by one focus group attendee who shared, "We have to play many roles. I took attendance, changed four diapers, and prepared food before I came here. We have to run a business, cook, clean, and teach." The cost and time required for continuing education contribute to compassion fatigue, secondary trauma, and burnout among childcare providers.

These challenges not only impact the financial viability of early childhood education childcare providers but also compromise the quality of care and educational experiences for children. Addressing staffing shortages, providing financial support, and offering operational flexibility while maintaining safety standards are crucial to ensuring a stable and high-quality early childhood education system.

Childcare providers are grappling with significant operational and financial hurdles, underscoring the need for increased support and systemic changes.

As the ARPA that has been instrumental in supporting the childcare and early education sector ends, the long-standing structural issues plaguing the industry have persisted and intensified.

Rising program costs, coupled with low wages, have led to increased staff burnout and high turnover rates. As one childcare owner shared, "It is difficult to recruit and retain quality staff at current reimbursement rates."

The combination of these challenges has resulted in a diminished supply of quality care, which has far-reaching implications for communities. Without adequate funding and support, the childcare and early education sector will continue to face an uphill battle in providing the essential services that families, businesses, and communities depend on to succeed.

Staffing shortages:

Childcare providers report not having enough teachers, which limits their ability to operate at full capacity. Upfront costs for training and background checks cause delays in onboarding staff and lost investment. This staffing shortage leads to waitlists for families seeking childcare services.

Financial Constraints:

The lack of adequate staffing and the inability to operate at full capacity directly translates to lost income for childcare providers, forcing them to make difficult financial decisions.

Regulatory Compliance:

Licensing requirements mandate specific teacher-to-child ratios preventing childcare providers from exceeding these ratios even when faced with staffing shortages. This constraint further limits their ability to accommodate more children or generate additional revenue. This is not to suggest that ratios change as this requirement is critical for maintaining safety and quality for children, but rather to illustrate the complexities of childcare operations.

Continuity of Care:

The combination of staffing shortages and high teacher turnover or leave disrupts the continuity of care for children, as they may not have the same teacher or consistent experience throughout the year.

Childcare Business Model: Supply & Demand

The current childcare business model in the United States is a failed one due to the high costs of care that are unaffordable for many families, low wages for staff that hinder the attraction and retention of qualified workers, and an unsustainable business model that cannot balance the costs of providing care with what parents can afford to pay. Given childcare's crucial role in child development, supporting working parents, and impact on the broader economy, many argue it should be treated as a public good (NYT, 2023). The disparity in wage growth between the childcare sector and other sectors like retail and fast food has made it even more difficult for childcare providers to compete for talent and maintain a stable workforce. The prices do not increase to meet the demand because families cannot afford it.

Operational Complexities:

Balancing licensing capacity, staffing levels, and teacher-to-child ratios create a complicated operational landscape for childcare providers, leading to situations where they may have both waitlists and empty seats simultaneously.

Nurturing Resilient, Well-Equipped, and Supported Early Childhood Educators

Early childhood education (ECE) teachers face significant challenges in their field, as highlighted by the 2024 NAEYC workforce survey conducted during the COVID-19 pandemic (National Association for the Education of Young Children, 2024). The survey revealed that many educators reported low pay and lack of opportunities as major obstacles, with 56 percent of respondents rating "financial supports for childcare businesses" as "extremely important." The Northwest Florida survey echoed that national survey very closely with 56.8 percent of respondents rating "financial supports for childcare businesses" as "extremely important."

The early learning workforce faces numerous challenges that impact their well-being and the quality of care they provide, necessitating targeted support and investments.

Ensuring a qualified and stable early childhood education workforce is a crucial challenge in Northwest Florida. The field faces issues such as teacher shortages, especially for those equipped to work with children with special needs, safety concerns deterring potential candidates, low wages, and limited benefits contributing to high turnover rates, and a perceived lack of respect for the profession.

What do Early Childhood Education Teachers say?

Early childhood education (ECE) teachers face significant challenges in their field, as highlighted in a national workforce survey. In our focus group, many educators reported low pay and lack of opportunities as major obstacles. The expiration of support through federal disaster recovery and ARPA grants, which funded grants through the Early Learning Coalition (ELC), has left many educators feeling vulnerable and in need of a safety net.

NAEYC ECE workforce survey (2024)

The National Association for the Education of Young Children (NAEYC) conducted a ECE workforce survey in January 2024, revealing the persistent challenges faced by the early childhood education (ECE) sector in the United States. The survey included responses from over 10,000 ECE professionals, with 313 participants from Florida. Despite some reports of new childcare programs opening, a significant percentage of Florida respondents (43%-55%) observed program closures in their communities over the past year. Additionally, many educators (40%-46%) reported increased levels of burnout compared to the previous year, and while 16% indicated an improvement in their financial situation, nearly a third (32%) experienced a worsening economic state.

As one provider noted, "With rising costs, childcare centers will not be able to afford to stay open without financial assistance." They explained that minimum wage increases strain childcare centers' ability to retain experienced teachers they have had for many years, as operating costs rise. "Funding needs to be available to help us retain teachers we've had for 14-20 years. Minimum wage continues to go up. We keep small ratios for quality but are financially stressed."

ECE teachers also face challenges related to workforce shortages, especially for those equipped to work with children with special needs. Early childhood education college students have expressed concerns about safety, such as the potential for school violence, which has led some to choose careers in early learning outside of classroom settings. Low wages and limited benefits contribute to high turnover rates among early learning professionals, which can negatively impact the quality and consistency of care.

Once on the job, staff face stress from the nature of the work and the prohibitive cost of living in some areas, leading to high turnover and creating added costs for business owners. Early childhood educators also lack comprehensive benefits like paid time off, retirement plans, and healthcare, which makes retention difficult.

These challenges not only impact the well-being of ECE teachers but also compromise the quality of care and educational experiences for children. Addressing compensation, benefits, and working conditions is crucial to ensuring a stable and high-quality early childhood education workforce.

ECE teachers are grappling with significant professional and financial hurdles, underscoring the need for increased support and systemic changes in the field.

Low Compensation and limited benefits:

ECE teachers report low wages as a major obstacle, with many struggling to make ends meet despite their critical role in children's development and education.

Workforce Shortages:

There is a shortage of qualified ECE teachers, especially those equipped to work with children with special needs, which limits the ability of childcare centers to provide high-quality care and education. High turnover rates place additional stress on the remaining teachers.

Safety Concerns for Future Educators:

Early childhood education college students have expressed concerns about safety issues, such as the potential for school violence, leading some to choose careers in early learning outside of classroom settings.

Lack of Respect:

ECE teachers often feel that their profession lacks respect from the community, despite the critical role they play in children's development and the functioning of families and the economy.

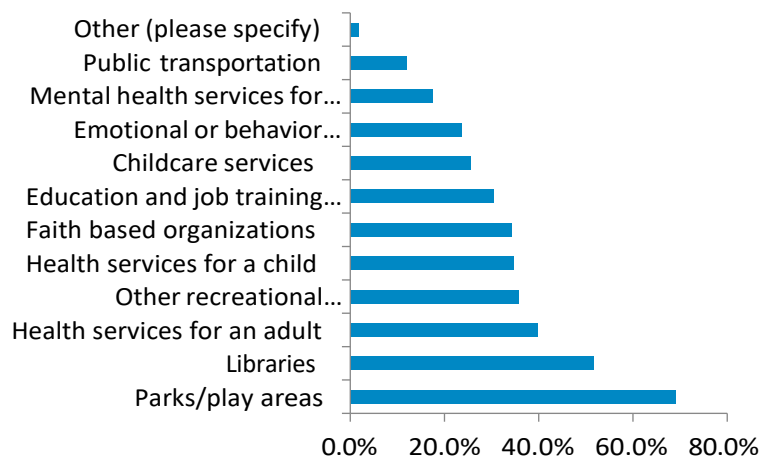
Vibrant and Economically Resilient Northwest Florida Communities

The Early Learning Coalition's Community Needs Assessment stakeholder engagement provides a comprehensive look at the current state of support for families and young children in Northwest Florida communities. By gathering insights from community members, the assessment highlights the strengths that contribute to a nurturing environment for children and families, as well as the areas that require further attention and improvement. This valuable feedback serves as a roadmap for enhancing the well-being and development of young children in the region.

What does the community say?

The community needs assessment survey highlights the importance of investing in public spaces like libraries and parks for early learning, community well-being, and health. These spaces provide opportunities for social connections, allowing children to develop social skills and a sense of community responsibility. They also offer recreational activities that promote physical health and help establish healthy habits.

Which of these services do you typically use in your community?



Libraries serve as informal learning environments, providing access to educational resources and programs that support early literacy. Public spaces can host events and programs that strengthen community bonds, celebrate diversity, and provide opportunities for intergenerational learning. Furthermore, investing in accessible and inclusive public spaces ensures that all community members have access to resources and opportunities that support early learning and well-being, creating a more equitable community for all. Survey participants emphasized the need for welcoming and accessible public spaces for families from all backgrounds.

Social Connections Public spaces like libraries and parks provide opportunities for young learners and their families to interact with others in their community, fostering social connections and a sense of belonging. These interactions can help children develop social skills, empathy, and a sense of community responsibility. A participant shared, "Public spaces allow my children to meet and play with other kids from diverse backgrounds, helping them develop important social skills."

Recreational Opportunities and Physical Health Parks and other outdoor public spaces offer a variety of recreational activities that promote physical health, motor skill development, and an appreciation for nature. These experiences are crucial for young learners' overall well-being and can help establish healthy habits that last a lifetime. Survey participants highlighted the

importance of recreational opportunities in public spaces for young learners and their families, which can contribute to better physical fitness and health outcomes. One respondent stated, "Parks provide a safe space for my kids to run, play, and explore, keeping them active and healthy."

Learning Environments Libraries serve as informal learning environments, providing access to books, educational resources, and programs that support early literacy and a love for learning. These resources can be especially valuable for families who may not have access to a wide variety of learning materials at home. Survey respondents recognized the role of libraries in facilitating learning opportunities for young children. A participant shared, "The library's story time sessions have been instrumental in helping my child develop a love for reading and learning."

Community Engagement Public spaces can host events and programs that bring the community together, such as story times, workshops, and festivals. These events can help strengthen community bonds, celebrate diversity, and provide opportunities for intergenerational learning and knowledge sharing. Participants in the survey emphasized the importance of public spaces in fostering community engagement and connections. One respondent noted, "Community events held in our local park have helped me connect with other families and feel more involved in our neighborhood."

Accessibility and Inclusion Investing in public spaces ensures that all members of the community, regardless of socioeconomic status, have access to resources and opportunities that support early learning and well-being. This commitment to accessibility and inclusion helps create a more equitable community for all. Survey participants recognized the need for accessible and inclusive public spaces that cater to the needs of young learners and their families. A participant emphasized, "Public spaces should be welcoming and accessible to all families, regardless of their background or income level."

Community Strengths

The survey asked residents "What is working well in your community?" to identify positive aspects and strengths from the community's perspective. The analysis of the diverse range of responses, revealed distinct themes that highlighted areas residents felt were thriving or making a positive impact. The most frequently mentioned themes are presented below, from the most to the least common, along with two representative quotes per theme to illustrate how those themes manifested in the communities.

TABLE 21 WHAT IS WORKING WELL IN YOUR COMMUNITY?

Main Themes	Representative Quotes
Community Activities and Events	<p>"Downtown Thursday night, where everyone comes together."</p> <p>"There are a lot of children-based community events in our area. There are community resources for families to learn about and activities for children to engage with their families."</p>

Main Themes	Representative Quotes
Education and Schools	<p>"The public school works together with the private VPK programs to help all students get ready for kindergarten."</p> <p>"We have a wonderful school and childcare facility with teachers/staff who care about the students and children."</p>
Community Resources and Support	<p>"Faith-based organizations who are helping individuals' needs, the public library system, and the impact the ELCNWF has on aiding childcare centers in becoming high quality as well as helping parents gain the knowledge and resources needed to do what is best for their children."</p> <p>"The number of government and nonprofit agencies locally with dedicated professionals that work together with limited resources to help those in need. Plus, Dolly Parton's Imagination Library in Washington County."</p>
Transportation	<p>"Our community transit bus system is working pretty well and keeps making improvements to keep transportation an affordable means to get around town."</p> <p>"In my community, transportation and healthcare facilities are quite good."</p>
Healthcare and Mental Health Services	<p>"The school system has been very responsive to the mental health needs of students but there are not enough services in the community to meet the need."</p> <p>"Access to healthcare facilities, mental health services, and health education were identified as important community assets, although some comments noted a need for improvement in these areas."</p>
Environmental Health and Cleanliness	<p>"The environmental health of the community has been maintained very well. Both the cleanliness of the streets and the maintenance of public facilities are shown to be of a high standard."</p> <p>"Nice parks, good libraries, many faith-based organizations."</p>
Social Connection	<p>"Informal community bonds that support one another through small acts of kindness and sharing information."</p> <p>"People come together to help ones in need".</p>
Job Opportunities and Training	<p>"Job training and job fairs"</p> <p>"We have plenty of faith-based organizations here to help meet the needs of children and families. We also have opportunities for employment and steady income."</p>
Affordable Housing and Cost of Living	<p>"Availability of affordable housing"</p> <p>"Our community has grown back after the hurricane, but we are still missing affordable housing and mental health care."</p>
Safety and Security	<p>"Community life safety"</p> <p>"Neighborhood safety: less crime and homelessness on the streets, and a clean community."</p>

The Community Needs Assessment stakeholder engagement underscores the importance of a collaborative effort in supporting the growth and well-being of young children and families in

Northwest Florida. By leveraging the identified strengths, such as well-maintained public spaces, strong school systems, and community events, while simultaneously addressing areas for improvement, including accessible recreation, expanded educational resources, and enhanced public services, the region can create a more nurturing and inclusive environment for all. The insights gathered from the community serve as a powerful tool for guiding future initiatives and investments that will help Northwest Florida's youngest residents thrive.

Thriving Local Businesses & Parent Workforce

When childcare deficiencies constrain parents' ability to work, not only are households impacted, but businesses that rely on working parents as employees also suffer. In the chain of economic impacts resulting from an inadequate childcare supply, business losses are a function of the work losses incurred by parents. Businesses face two main types of losses due to childcare constraints on their workers: direct productivity losses, such as reduced work hours and lowered work performance, and continual pay and benefit losses from paying employees when they are not working. When childcare gaps force parents to leave their jobs, businesses also incur turnover costs related to recruiting, vetting, and onboarding new employees.

The focus group findings provide additional evidence supporting the crucial role of childcare subsidies in enabling parents to participate in the workforce and maintain their income. Parents said they would not have been able to work without that support from the early learning coalition. By making childcare more affordable and accessible, subsidies can help alleviate the financial burden on families and allow parents to pursue employment opportunities without being constrained by the high costs of childcare.

With a vast majority of respondents rating the availability of affordable childcare, cost of living, job training and educational opportunities, and the availability of qualified employees as important issues, it is evident that a lack of accessible and affordable childcare options can hinder parents' ability to work and participate in activities that could improve their employment prospects. The open-ended comments further emphasize the challenges faced by families in finding affordable childcare, which can lead to reduced work hours, lowered performance, and even job loss. These childcare-related constraints on working

Workforce and Local Economies

The "Untapped Potential in FL" report released by the Florida Chamber Foundation and the National Chamber Foundation in September 2023 (Florida Chamber of Commerce, 2023) highlighted the need for accessible and affordable childcare in Florida. The report found

- 64% of parents of young children in Florida missed work/class at least once in 3 months due to childcare issues.
- 15% of parents left a job in the prior 6 months due to childcare issues.
- The estimated annual economic loss from childcare issues in Florida is \$5.38 billion.

Legislation was proposed in FY'23 and FY'24 which aimed to address the lack of affordable childcare by offering tax credits to employers who assist with childcare costs or establish and operate childcare facilities for their employees.

parents affect businesses through productivity losses, increased expenses, and turnover costs, demonstrating the far-reaching economic consequences of inadequate childcare supply in the community.

Conclusions

The Early Learning Coalition of Northwest Florida's comprehensive community needs assessment has shed light on the significant challenges facing young children, families, and the early childhood education system across the region. However, it has also revealed opportunities for meaningful change and a profound commitment from stakeholders to prioritize the success and well-being of the area's youngest residents. Stakeholders have shown a continued dedication to these critical issues, expressing a desire to remain actively involved in addressing them.

The assessment uncovered disparities in access to affordable, high-quality childcare and early learning opportunities, exacerbated by factors such as family income level, geographic location, and a child's age or special needs. Kindergarten readiness data highlighted gaps between counties and between children who could attend voluntary pre-kindergarten (VPK) programs versus those who did not. The readiness gaps for incoming kindergartners within Bay County are staggering, with schools reporting readiness rates spanning from just 29 percent to as high as 84 percent.

The needs assessment also brought to the forefront the immense strain on the early childhood workforce and childcare businesses. Low compensation, high turnover rates, and staffing shortages have undermined the quality and continuity of care. Meanwhile, childcare providers grapple with rising costs amid stagnant reimbursement rates and an uncertain funding landscape following the expiration of pandemic relief funds.

Woven throughout the findings was an overarching need for holistic, multi-generational support empowering families beyond childcare access alone. Mental health resources, parenting education, food and housing security, and other comprehensive services emerged as critical elements in fostering nurturing environments for children's optimal development.

Based on the comprehensive needs assessment findings, the Early Learning Coalition of Northwest Florida could consider implementing the following strategies to address the identified challenges and promote equitable access to high-quality early childhood education and support services throughout the region:

Localized Service Delivery Strategies

- Analyze Florida Assessment of Student Thinking (FAST) outcome data to identify and target underperforming schools and neighborhoods
- Increase targeted community outreach through channels like pediatricians, churches, and libraries
- Tailor outreach messaging and services to tackle local gaps impacting readiness
- Adapt program models (home visiting, parenting classes, play groups, mobile resources) based on each community's needs
- Prioritize intensive services in high need neighborhoods

- Strengthen strategic partnerships with local school districts, early learning providers, and community organizations for coordinated efforts
- Support educator training tailored to challenges in lower-scoring areas
- Restructure ELCNWF with regional/county teams to lead customized initiatives

Highly Localized Family and Community Outreach

- Target diverse families beyond traditional childcare settings, such as those using in-home care, in disadvantaged areas, military families, and non-parental caregivers
- Leverage trusted community sources like healthcare providers and faith leaders
- Frame messaging around kindergarten readiness and FAST scores
- Implement location-specific outreach tactics focused on promoting school readiness
- Promote family-friendly policies, such as flexible work arrangements, to help parents balance work and childcare responsibilities

Sustainable Funding Strategies

- Diversify with flexible, sustainable funding from multiple public and private sources
- Engage policymakers to secure commitments and flexibility in using funds
- Expand eligibility for working families, such as increasing income thresholds for childcare assistance
- Promote employer childcare benefits and cost-sharing models.
- Consider the viability of Children's Services Councils with taxing authority in larger counties like Bay or Jackson
- Seek local funding for long-term investments in prevention and early intervention

Strengthening the Provider Pool

- Expand the school readiness program in the home-based market
- Offer training, coaching, and resources tailored to home environments
- Create networking and support groups for home-based providers
- Adjust payment schedules to address timing challenges for all providers
- Partner with military installations to prioritize slots for military families
- Identify Gold Seal Providers potentially eligible for military fee assistance

System Integration and Improvement

- Foster strong partnerships and collaboration among stakeholders for seamless coordination
- Develop robust data systems and strengthen staff capacity to collect, share, and analyze information across programs
- Use data for informed decision-making, continuous improvement, and accountability and continuous public engagement

The needs assessment process fostered a solutions-oriented dialogue among a diverse array of stakeholders, including families, educators, childcare providers, business leaders, policymakers, and community members. This collaborative engagement generated valuable insights that could

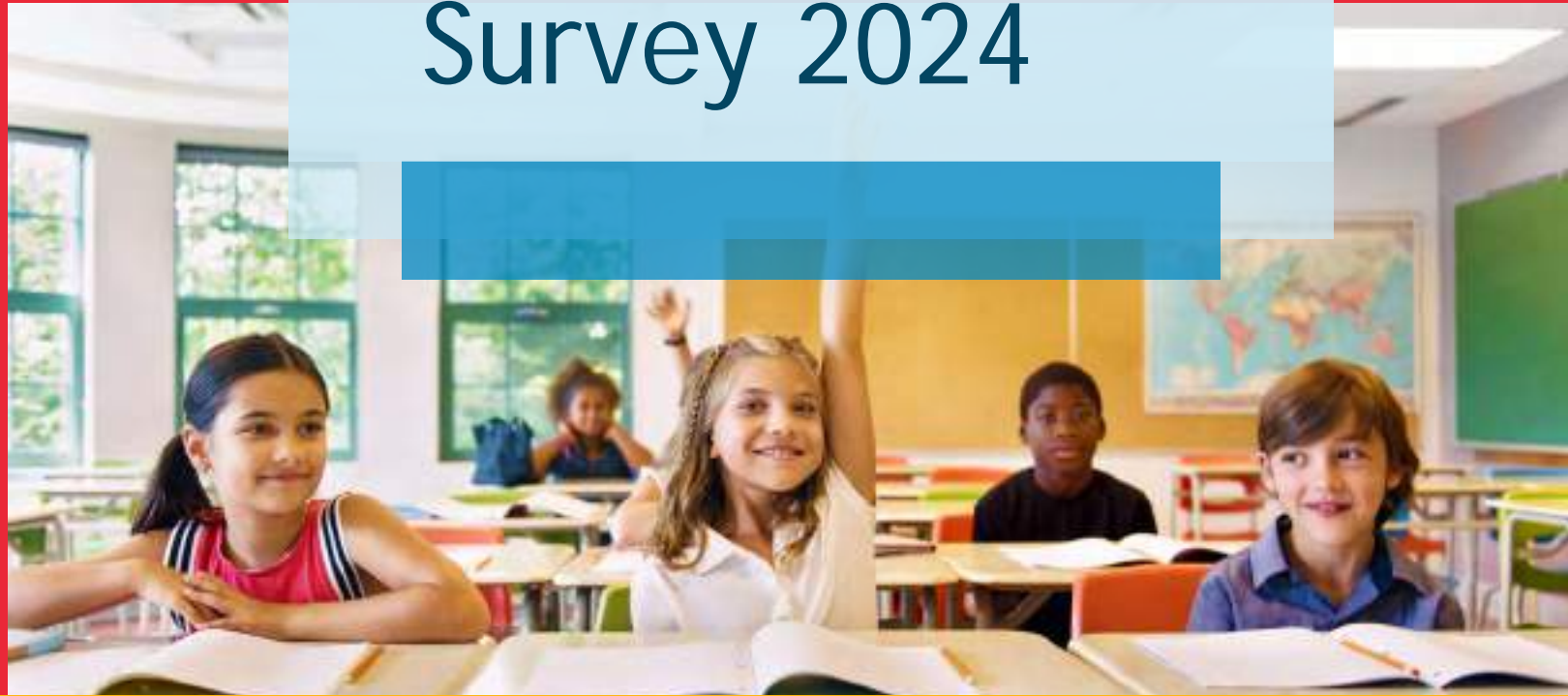
inform strategies and innovative ideas for driving sustainable improvements in early childhood education and support services. Furthermore, the flexible pandemic relief funding enabled the Early Learning Coalition to pilot various grant programs and gather community feedback on the most successful approaches. With this foundation of community input and data on effective models, the Coalition is well-positioned to continue and expand upon the most promising practices, provided they can secure ongoing funding streams. The time-limited grants allowed the Coalition to field-test different program models, strengthening their ability to optimize services moving forward if future funding is secured.

As the region continues recovering from natural disasters and the pandemic's upheaval, and its impact on the childcare infrastructure, the needs assessment illuminates a critical juncture to prioritize affordable, high-quality early learning and nurturing environments from birth - empowering the full development and future success of Northwest Florida's children and communities.

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Community Needs Survey 2024



The Early Learning Coalition of Northwest Florida conducted a comprehensive Community Needs Assessment survey to gather insights from various stakeholders, including families, early learning educators, and community members, across its service area. The survey aimed to ensure that the Coalition's resources, services, and strategic initiatives effectively support school readiness and positive child development outcomes for young children.



Introduction

The Early Learning Coalition of Northwest Florida conducted a comprehensive Community Needs Assessment survey to better understand the needs, experiences, and perspectives of families and early learning providers across its service area. This rigorous assessment aims to ensure the Coalition's resources, services, and strategic initiatives are effectively supporting school readiness and positive child development outcomes for all children birth through age five.

The survey collected 509 total responses from a diverse range of stakeholders, including parents, grandparents, childcare providers, early educators, and other community members throughout Bay, Calhoun, Franklin, Gulf, Holmes, Jackson, Washington, and other counties. This robust community participation provides invaluable insights into the unique needs and challenges facing families in each of the distinct communities served.

Following this introduction, the report summarizes key takeaways derived from an in-depth analysis of the quantitative and qualitative survey data. Supplemental data visualizations and open-ended response excerpts are included to further illuminate the lived experiences behind the need areas identified.

Survey response overview

Respondents spanned the seven county services are allowing for an understanding of the unique needs and challenges across different geographic regions.

Table 1 - Respondents by County

Which county do you live in?		
Answer Choices	Responses	
Bay	32.94%	167
Calhoun	15.38%	78
Gulf	16.17%	82
Franklin	5.72%	29
Holmes	2.96%	15
Jackson	8.09%	41
Washington	14.20%	72
Other (please specify)	4.54%	23
	Answered	507
	Skipped	2

To better understand the survey's representation of each county's population, we conducted an analysis to compare the number of respondents to the total population of each county. While Bay County had the highest number of respondents, it represented a smaller percentage of its total population compared to Calhoun, Gulf, and Washington counties. Calhoun and Gulf counties had the highest survey participation rates relative to their population sizes, while Bay, Jackson, and Holmes counties had the lowest.

The "other" category includes respondents from various Florida counties, with Liberty County having the most. One Liberty County respondent provides services in Calhoun and Jackson counties, showing the interconnectedness of the region. Nine respondents were from other states but have economic ties to Northwest Florida through businesses, homes, or rental properties. Despite not being permanent residents, their investment in the area shows their commitment to the community, so all responses are included in the analysis.

The survey collected responses from a diverse group of 483 individuals, each with unique perspectives and roles within the community. The largest group of respondents, making up 50.10% (242), identified themselves as parents or guardians, emphasizing the significant representation of families in the survey. The second-largest group, at 16.15% (78), consisted of individuals working in nonprofit organizations, followed by employers or business owners at 15.73% (76). Early education providers and teachers made up 15.11% (73) of the respondents, while 13.46% (65) selected the "Other" category, indicating roles that did not fit into the predefined options. Notably, 10.97% (53) of the respondents were employees of the Early Learning Coalition of Northwest Florida (ELCNWF), providing valuable insights from within the organization. The remaining respondents were distributed among childcare owners at 8.70% (42), school personnel at 7.45% (36), faith leaders at 4.35% (21), and government employees at 3.52% (17). This diverse mix of respondents ensures a comprehensive understanding of the community's needs and perspectives.

Table 2 Roles

What best describes your role/s in the community? (check all that apply)

Answer Choices	Responses	
Parent or guardian	50.10%	242
Early education provider/teacher	15.11%	73
Childcare owner	8.70%	42
Nonprofit organization	16.15%	78
Faith leader	4.35%	21
Employer or business owner	15.73%	76
Government	3.52%	17
School personnel	7.45%	36
ELCNWF employee	10.97%	53
Other (please specify)	13.46%	65
	Answered	483
	Skipped	26

“Other” respondents’ responses include a diverse mix of roles and affiliations beyond parents, such as:

- Retired professionals (teachers, school employees, healthcare workers)
- Grandparents
- Community volunteers
- Students
- Head Start personnel
- Employees in various fields
- Concerned citizens
- Tourism/visitor services workers
- Organizational representatives (mentor programs, non-profits, etc.)

22.56% of respondents indicated living in a household having a military affiliation, either being active duty, or retired. Having this wider range of perspectives from different community members can provide a more holistic view of the needs, strengths, and opportunities when it comes to supporting children and families.

Parent/caretaker survey

To better understand the unique needs and experiences of families with young children, the survey included additional questions specifically targeted at the 418 respondents who identified themselves as parents of children under the age of nine. These questions aimed to gather more detailed insights into the challenges, preferences, and experiences these families face when it comes to early childhood education and development programs, services, and support systems. The survey included questions about the age of the respondents' children and their current childcare arrangements. This information helps provide context for understanding the unique needs and challenges faced by families with children of different ages.

Child age

Parent Respondents by Child Age (excluding "None of the above):

- Age 0-2: 15.64% (76 respondents)
- Age 3-5: 26.95% (131 respondents)
- Age 6-9: 17.49% (85 respondents)
- Age 9+: 25.93% (126 respondents)

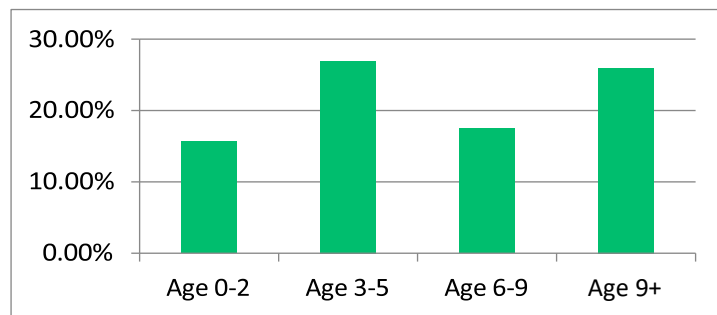


Figure 1 Respondents by age of child

Among the parent respondents:

- Parents of infants and toddlers (0-2 years) constituted 15.64% of the parent respondents, highlighting the presence of families with very young children who may require specific support and resources related to early development and care.
- The highest percentage (26.95%) had children in the 3-5 years age category, which typically includes children eligible for early education programs like preschool and VPK. This suggests that a sizable portion of the parent respondents have children who may be directly impacted by available early learning and childcare services in the region.
- Parents of children in the 6-9 years age category made up 17.49% of the parent respondents, representing a group with children in elementary school or afterschool programs.
- The second-highest percentage of parent respondents (25.93%) had children in the 9+ years age category, indicating a substantial representation of parents with older children who may have different perspectives regarding early education and community resources as former consumers.

It is important to note that some respondents have children in multiple age categories, so the percentages may not add up to 100% of parents.

Childcare arrangements

What is your current or past childcare arrangement?

Answer Choices	Responses	
At home with a parent or primary caregiver	35.81%	111
Individual care from someone else in your home or another	16.77%	52
Childcare at a center or preschool	27.74%	86
Afterschool care	9.35%	29
I am currently looking for childcare	4.84%	15
Other (please specify)	5.48%	17
	Answered	310

The survey revealed a mix of childcare arrangements being used by parents, with the most common being parental/at-home care and childcare centers/preschools. However, the "Other" responses highlighted that many families utilize a combination or patchwork of different options based on their needs.

Some key points from the "Other" responses:

- Grandparents/family members often supplement formal childcare arrangements.
- Childcare needs vary across multiple children in the same household.
- Affordable and reliable childcare options are lacking in some areas.
- Families piece together solutions like parent or relative care + preschool/aftercare.

While some clear popular options emerged, the "Other" responses revealed the diversity of real-world childcare solutions and potential gaps that exist for many parents juggling these responsibilities. Childcare availability and affordability challenges were also mentioned.

Parents with Infants and toddlers

Many infant or toddler parents also have older children and utilize multiple childcare arrangements.

A higher percentage of infant and toddler parents (8.00%) are currently looking for childcare compared to the whole population (4.84%). This suggests that families with very young children may face more challenges in finding suitable care arrangements.

The survey results emphasize the need for a comprehensive approach to early childhood care and education that includes a range of options to meet the diverse needs of families with infants and toddlers, as well as targeted support for parents and caregivers providing care at home.

County Differences

A crosstab analysis by county highlights the differences in childcare arrangements across counties. Any notable variations are highlighted below:

Bay County:

- **Childcare at a center or preschool: 35.79% (highest among all counties)**
- At home with a parent or primary caregiver: 33.68%
- Afterschool care: 18.95% (highest among all counties)
- Individual care from someone else: 7.37%
- Currently looking for childcare: 4.21%

Calhoun County:

- **Individual care from someone else: 37.74% (highest among all counties)**
- At home with a parent or primary caregiver: 32.08%
- Childcare at a center or preschool: 26.42%
- Afterschool care and currently looking for childcare: both 1.89%

Gulf County:

- **At home with a parent or primary caregiver: 33.33%**
- Childcare at a center or preschool: 29.63%
- Individual care from someone else: 25.93%
- Afterschool care: 7.41%
- Currently looking for childcare: 3.70%

Franklin County:

- **At home with a parent or primary caregiver: 35%**
- Individual care from someone else and childcare at a center or preschool: both 25%
- Afterschool care: 10%
- Currently looking for childcare: 5%

Holmes County:

- **At home with a parent or primary caregiver: 72.73% (highest among all counties)**
- Childcare at a center or preschool: 27.27%
- No respondents for other arrangements

Jackson County:

- **Childcare at a center or preschool: 37.04%**
- At home with a parent or primary caregiver: 33.33%
- Individual care from someone else and afterschool care: both 11.11%
- **Currently looking for childcare: 7.41%**

Washington County:

- At home with a parent or primary caregiver: 51.85%
- Childcare at a center or preschool: 20.37%
- Individual care from someone else: 16.67%
- **Currently looking for childcare: 7.41%**
- Afterschool care: 3.7%

Key Findings based on parent responses:

- Bay County has the highest percentage of childcare at a center or preschool (35.79%) and afterschool care (18.95%).
- Calhoun County has the highest percentage of individual care from someone else (37.74%).
- Holmes County has the highest percentage of at-home care with a parent or primary caregiver (72.73%) and no respondents for other arrangements.
- Franklin and Gulf Counties have similar distributions, with at-home care being the most common, followed by individual care and childcare centers.
- Jackson County has a relatively even distribution between childcare centers (37.04%) and at-home care (33.33%).
- Washington County has a high percentage of at-home care (51.85%) and a lower percentage of childcare center use (20.37%) compared to other counties.
- Jackson and Washington counties have the highest percentage of families currently looking for childcare at 7.41%.

These differences suggest that childcare arrangements vary significantly across counties, likely due to factors such as availability of childcare centers, affordability, and local preferences. Counties with higher percentages of at-home care may benefit from increased access to affordable childcare options and in home supports for parents and caregivers.

Parental factors in supporting child's learning and development

Parents were asked to rate their level of agreement with statements assessing their knowledge, confidence, and access related to supporting their child's education and development. These statements covered understanding kindergarten expectations, confidence in encouraging reading

and math skills at home, confidence in managing child behaviors and emotions, knowledge of where to find educational resources, and ability to access those resources.

1. Understanding of kindergarten expectations: This statement gauges parents' familiarity with the skills and knowledge their child is expected to know upon entering kindergarten.
 - 82.9% of parents strongly agree or agree that they have a good understanding of what is expected of their child in kindergarten.
 - Only 5.26% disagree or strongly disagree, indicating a high level of understanding among most parents.
2. Confidence in encouraging reading at home: This statement assesses parents' self-assurance in their ability to support and promote their child's reading skills in the home environment.
 - 85.43% of parents strongly agree or agree that they feel confident in knowing how to encourage their child's reading at home.
 - Only 5.29% disagree or strongly disagree, suggesting that most parents feel well-equipped to support their child's reading development.
3. Confidence in encouraging math skills at home: This focuses on parents' confidence in their ability to foster their child's mathematical understanding and skills at home.
 - 77.74% of parents strongly agree or agree that they feel confident in knowing how to encourage their child's math skills at home.
 - 8.64% disagree or strongly disagree, indicating that while most parents feel confident, there is room for improvement in supporting math skills at home.
4. Confidence in managing a child's behaviors and emotions: This statement addresses parents' perceived ability to effectively manage and respond to their child's challenging behaviors and emotional expressions.
 - 77.81% of parents strongly agree or agree that they feel confident in knowing how to help their child with big behaviors and big emotions.
 - 10.27% disagree or strongly disagree, suggesting that some parents may need additional support or resources in this area.
5. Knowledge of where to find educational resources: This statement evaluates parents' awareness of available sources and outlets for accessing educational materials and support.
 - 73.91% of parents strongly agree or agree that they know where to find educational resources if they need them.
 - 73.84% strongly agree or agree that they can get educational resources when they try to access them.

6. Ability to access educational resources: Building upon the previous statement, this assesses parents' actual success in obtaining the educational resources they seek when attempting to access them.

- 73.84% strongly agree or agree that they can get educational resources when they try to access them.
- The slightly higher percentage of disagreement for knowing where to find resources (9.37%) compared to being able to access them (5.30%) suggests that some parents may be aware of the existence of resources but face challenges in locating them.

For infant and toddler parents 67.1% of parents know where to find educational resources when needed, a notable 15.8% disagree or strongly disagree, indicating a potential gap in resource awareness. When trying to access educational resources, 69.74% of infant toddler parents agree that they can get them, but a significant 26.3% are neutral, suggesting that some parents may face barriers or are unsure about their ability to obtain these resources.

The survey results from infant and toddler parents reveal that most feel confident in their ability to support their child's early learning and development, including reading and math skills, as well as managing big behaviors and emotions. A majority also believe they have a good understanding of kindergarten expectations. However, while a significant majority of parents feel confident in their ability to locate and access educational resources, there is still room for improvement in resource awareness and accessibility.

Parent concerns

Here are the concerns listed from highest percentage to lowest:

Are you/your household concerned about the following?

	Yes
Cost of living	73.9%
Managing technology or social media use by my child	54.6%
Getting information to gain skills to help me be a better parent	51.7%
Emotional health of a child in my home	51.5%
Finding quality childcare	50.5%
Getting healthcare or medicine for my child when he is sick	44.7%
Whether my child is meeting developmental milestones	44.5%
Emotional health of an adult in my home	42.7%
Accessing special education services	41.1%
Getting my child to attend school on a daily basis	37.5%
Having enough food to feed my family	35.1%

Cost of living was the top concern, selected by 74% of respondents. Managing children's technology/media use, getting parenting skills information, child's emotional health, and finding quality childcare were the next highest concerns around 50-55%.

The lowest concerns were getting the child to attend school daily (37.5%) and having enough food (35.1%)

Community wide survey questions

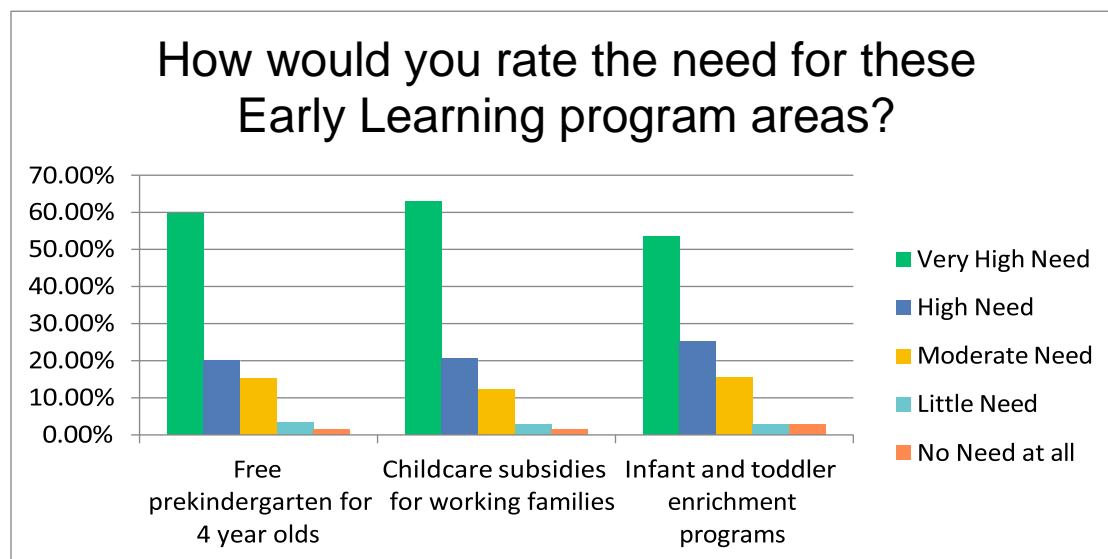
For a community to thrive, it is essential to have a range of accessible and well-functioning services that cater to the diverse needs of its residents. To better understand which services are most used and valued by community members, the survey asked participants, "Which of these services do you typically use in your community?" The results provide valuable insights into the services that play a crucial role in the daily lives of respondents and highlight areas where the community is effectively meeting the needs of its residents. Furthermore, identifying the most frequented services offers an opportunity for targeted outreach and engagement efforts, ensuring that essential information and resources reach community members in the places they already visit and trust.

Services

Which of these services do you typically use in your community?

Answer Choices	Responses	
Parks/play areas	69.0%	314
Libraries	51.7%	235
Health services for an adult	39.8%	181
Other recreational opportunities	35.8%	163
Health services for a child	34.7%	158
Faith based organizations	34.3%	156
Education and job training services	30.6%	139
Childcare services	25.5%	116
Emotional or behavior health services for a child	23.7%	108
Mental health services for an adult	17.6%	80
Public transportation	12.1%	55
Other (please specify)	1.8%	8
	Answered	455
	Skipped	54

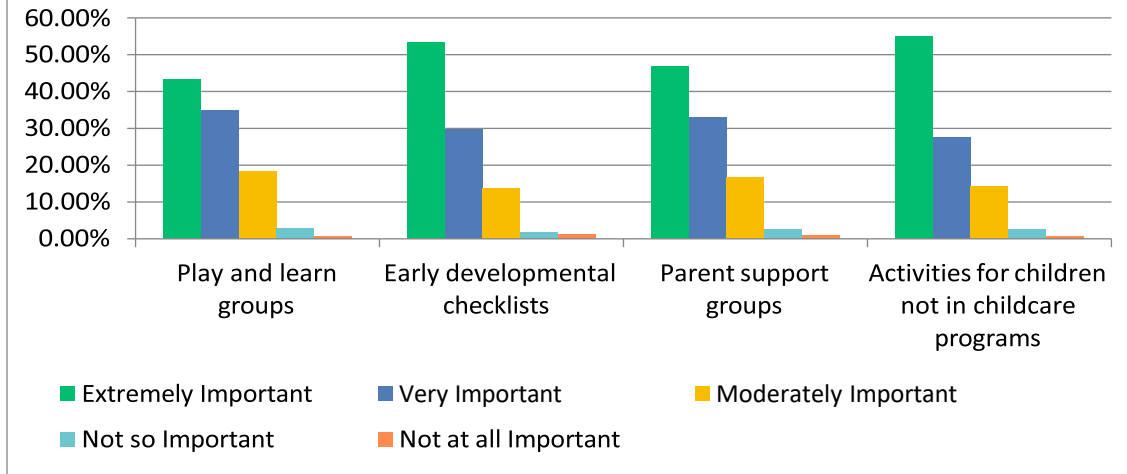
Nurturing Early Learners: Services and Support Program needs



The survey data reveals that all three Early Learning program areas - Free prekindergarten for 4-year-olds, Childcare subsidies for working families, and Infant and toddler enrichment programs - are perceived to have a high level of need by most respondents. The combined percentages of "Very High Need" and "High Need" responses range from 78.7% to 83.5%, with Childcare subsidies for working families and Free prekindergarten for 4-year-olds identified as having a slightly higher level of need compared to Infant and toddler enrichment programs.

These findings underscore the importance of investing in a comprehensive range of Early Learning programs to support children's development and learning, as well as to assist working families. Policymakers and stakeholders should prioritize funding and resources for these program areas to ensure that all children have access to high-quality early education opportunities and that families receive the necessary support.

How would you rate the importance of these parent support and education programs?



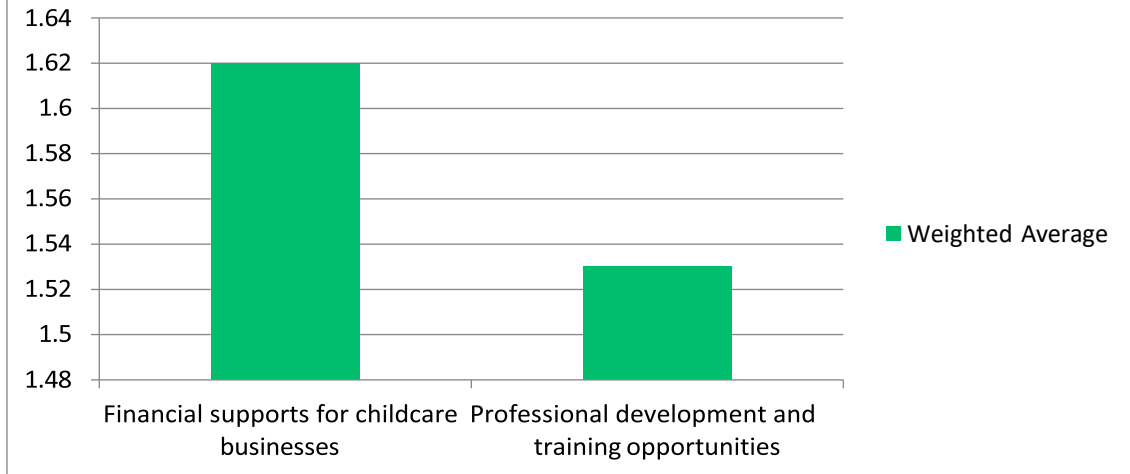
Key findings:

1. All four parent support and education programs are considered highly important by the majority of respondents, with the combined percentages of "Extremely Important" and "Very Important" responses ranging from 78.2% (Play and learn groups) to 83.3% (early developmental checklists).
2. Among the four programs, Activities for children not in childcare programs and early developmental checklists have the highest percentages of "Extremely Important" responses at 54.9% and 53.5%, respectively. This suggests that respondents place a slightly higher priority on these two programs compared to Play and learn groups (43.4%) and Parent support groups (46.9%).
3. The percentage of respondents who rated any of the programs as "Not so Important" or "Not at all Important" is consistently low, ranging from 3.3% (Activities for children not in childcare programs) to 3.5% (Play and learn groups).

The survey results indicate that all four parent support and education programs - Play and learn groups, early developmental checklists, Parent support groups, and Activities for children not in childcare programs - are considered highly important by most respondents. Among these programs, Activities for children not in childcare programs and early developmental checklists are given a slightly higher priority based on the higher percentage of "Extremely Important" responses.

These findings emphasize the need to invest in a variety of parent support and education programs to ensure that families have access to the resources and guidance they need to support their children's development and well-being.

How would you rate the importance of these provider and teacher supports programs?



To better understand the perceived importance of financial support for childcare businesses and professional development and training opportunities among respondents, we asked respondents to rate its importance. The result is:

Financial supports for childcare businesses:

- Extremely Important: 56.67%
- Very Important: 27.63%
- Moderately Important: 13.58%
- Slightly Important: 1.17%
- Not at all Important: 0.94%
- Weighted Average: 1.62

Professional development and training opportunities:

- Extremely Important: 62.88%
- Very Important: 24.36%
- Moderately Important: 10.44%
- Slightly Important: 1.86%
- Not at all Important: 0.46%
- Weighted Average: 1.53

Key findings:

Both financial support for childcare businesses and professional development and training opportunities are considered highly important by most respondents. For financial support, 84.30% of respondents rated it as either "Extremely Important" or "Very Important". Similarly, for

professional development and training opportunities, 87.24% of respondents chose these top two importance levels.

The weighted averages for both support programs are relatively low (1.62 for financial supports and 1.53 for professional development), confirming that respondents generally consider these programs to be important. The lower weighted average for professional development and training opportunities (1.53) further reinforces its slightly higher importance compared to financial supports (1.62).

Very few respondents rated either support program as "Slightly Important" or "Not at all Important", with these two categories combined accounting for only 2.11% of responses for financial supports and 2.32% for professional development and training opportunities.

In summary, the survey results clearly indicate that both financial supports for childcare businesses and professional development and training opportunities are considered highly important by the vast majority of respondents. While both programs are deemed crucial, professional development and training opportunities are given a slightly higher priority based on the higher percentage of "Extremely Important" responses and the lower weighted average.

Community issues

To understand the most pressing concerns facing a community, the survey asked participants to rate the importance of various issues, with the options being "Very Important," "Somewhat Important," "Important," "A little Important," and "Not important at all." By combining the percentages of respondents who rated each issue as either "Very Important" or "Somewhat Important," we can identify the issues that most community members consider to be of high priority.

Top five issues rated as "Very Important" or "Somewhat Important":

- Cost of living: 86.89% (374 respondents)
- Health care: 84.08% (376 respondents)
- Access to healthy food: 84.94% (360 respondents)
- Availability of affordable childcare: 83.89% (375 respondents)
- Job training and educational opportunities: 81.76% (364 respondents)

Other issues rated as "Very Important" or "Somewhat Important":

- Availability of affordable housing: 80.63% (384 respondents)
- Access to quality pre-kindergarten: 80.79% (384 respondents)
- Availability of qualified employees: 78.52% (351 respondents)
- Access to mental health services: 82.06% (366 respondents)
- Access to behavior management services: 86.26% (384 respondents)
- Recreational and social activities: 79.64% (345 respondents)
- Transportation: 84.46% (375 respondents)

Key findings:

When combining "Very Important" and "Somewhat Important," cost of living remains the top issue, with 86.89% of respondents rating it as such. Access to healthy food moves up to the second most important issue, with 84.94% of respondents rating it as "Very Important" or "Somewhat Important." Health care and availability of affordable childcare are close behind, with 84.08% and 83.89% of respondents, respectively, rating them as "Very Important" or "Somewhat Important."

Job training and educational opportunities rank as the fifth most important issue, with 81.76% of respondents rating it as "Very Important" or "Somewhat Important."

Access to behavior management services and transportation see a significant increase in importance when combining "Very Important" and "Somewhat Important," with 86.26% and 84.46% of respondents, respectively, rating them as such.

By combining "Very Important" and "Somewhat Important," we get a more comprehensive understanding of the issues that respondents consider to be of high importance. This analysis reveals that all the listed community issues are rated as important by a substantial majority of respondents (over 78% for each issue).

Availability of affordable childcare is considered the most important community issue **by infant and toddler parents**, with 85.52% rating it as "Very Important" or "Important." Followed by access to healthy food (82.90%), job training and educational opportunities (84.21%), cost of living (81.58%), and access to quality pre-kindergarten (81.58%) are also ranked highly, with over 80% of respondents considering these issues "Very Important" or "Important."

Community Strengths

The open-ended survey question, "**What is working well in your community?**" aimed to identify the positive aspects and strengths of these communities from the perspective of the residents themselves. The responses to this open-ended question were diverse and covered a wide range of topics. After analyzing the comments, distinct themes emerged, highlighting the areas that community members felt were thriving or making a positive impact on their lives and families.

The following table presents the most frequently mentioned themes in order from most to least common and two representative quotes from the survey responses to illustrate the specific ways in which these themes manifest in the communities.

Table 3 What is working well in your community?

Main Themes	Representative Quotes
Community Activities and Events	"Downtown Thursday night, where everyone comes together." "There are a lot of children-based community events in our area. There are community resources for families to learn about and activities for children to engage with their families."
Education and Schools	"The public school works together with the private VPK programs to help all students get ready for kindergarten." "We have a wonderful school and childcare facility with teachers/staff who care about the students and children."

Main Themes	Representative Quotes
Community Resources and Support	<p>"Faith-based organizations who are helping individuals' needs, the public library system, and the impact the ELCNWF has on aiding childcare centers in becoming high quality as well as helping parents gain the knowledge and resources needed to do what is best for their children."</p> <p>"The number of government and nonprofit agencies locally with dedicated professionals that work together with limited resources to help those in need. Plus, Dolly Parton's Imagination Library in Washington County."</p>
Transportation	<p>"Our community transit bus system is working pretty well and keeps making improvements to keep transportation an affordable means to get around town."</p> <p>"In my community, transportation and healthcare facilities are quite good."</p>
Healthcare and Mental Health Services	<p>"The school system has been very responsive to the mental health needs of students but there are not enough services in the community to meet the need."</p> <p>"Access to healthcare facilities, mental health services, and health education were identified as important community assets, although some comments noted a need for improvement in these areas."</p>
Environmental Health and Cleanliness	<p>"The environmental health of the community has been maintained very well. Both the cleanliness of the streets and the maintenance of public facilities are shown to be of a high standard."</p> <p>"Nice parks, good libraries, many faith-based organizations."</p>
Social Connection	<p>"Informal community bonds that support one another through small acts of kindness and sharing information."</p> <p>"People come together to help ones in need".</p>
Job Opportunities and Training	<p>"Job training and job fairs"</p> <p>"We have plenty of faith-based organizations here to help meet the needs of children and families. We also have opportunities for employment and steady income."</p>
Affordable Housing and Cost of Living	<p>"Availability of affordable housing"</p> <p>"Our community has grown back after the hurricane, but we are still missing affordable housing and mental health care."</p>
Safety and Security	<p>"Community life safety"</p> <p>"Neighborhood safety: less crime and homelessness on the streets, and a clean community."</p>

Question Anything Else?

Respondents optionally could provide cover a wide range of topics related to early childhood education, community resources, and support services in Northwest Florida. The main cross community themes that emerge from the comments include:

Childcare Availability and Affordability Challenges

- Multiple responses highlight the lack of available, affordable childcare options as a major issue in their communities.
- Several responses mention that rising costs are making childcare unaffordable for many families without assistance.
- Some childcare providers note challenges retaining staff due to low wages despite trying to keep child: teacher ratios low.

Need for Community Resources/Activities for Children

- Many express a desire for more community centers, after-school programs, activities tailored for children of all ages and abilities.
- Specific requests include splash pads, arts programs, sports facilities, library resources/events.
- Parks and playgrounds are described as rundown and in need of upgrades, especially for accessibility.

Support for Early Learning and Child Development

- The importance of quality early education and developmentally appropriate environments is emphasized by some.
- Respondents praised programs like VPK, and the Imagination Library, while also raising concerns around VPK availability.
- Requests for more resources/support for parents, childcare workers, homeschoolers to foster child development.

Services for Children with Special Needs/Disabilities

- Multiple responses point to a lack of services, activities, employment opportunities for children with special needs or disabilities.
- Ensuring accessibility and inclusion at community facilities is highlighted as an area needing improvement.

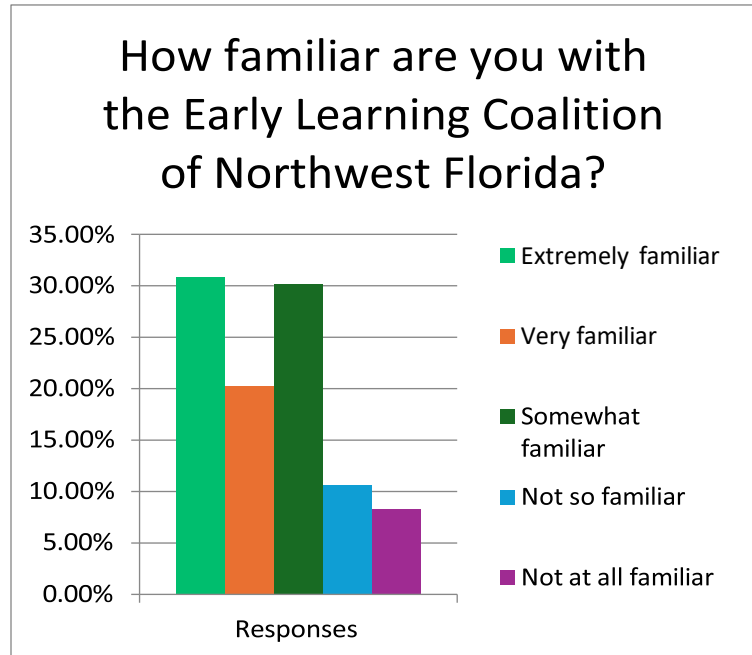
There are also some positive comments thanking the Early Learning Coalition for their assistance to families and childcare providers.

Overall, the comments suggest a need for more resources, support, and opportunities in various areas related to early childhood education, community development, and social services in Northwest Florida.

Communications

Public Awareness

The survey results showed a split in familiarity levels with the Early Learning Coalition of Northwest Florida among the 425 respondents to this question. Just over half, 51.06%, indicated a high level of familiarity by stating they were either "extremely familiar" or "very familiar" with the organization. However, a sizeable 18.82% expressed little to no familiarity, selecting that they were either "not so familiar" or "not at all familiar." The remaining respondents fell into the middle "somewhat familiar" category. The data suggests room for improved outreach to boost overall familiarity levels in the region.



The survey data revealed notable county-level variations in familiarity with the Early Learning Coalition of Northwest Florida across the region. Holmes and Jackson counties had the highest percentages indicating they were "Extremely familiar" at 33.33% and 52.78%, respectively. On the other end of the spectrum, Gulf County (23.44%) and Calhoun County (13.33%) had the highest percentages stating they were "Not at all familiar." An outlier was Franklin County, where zero respondents selected "Not so familiar" or "Not at all familiar." Bay County's largest group (32.14%) identified as "Very familiar," while Washington County responses were most spread out, with 38.33% being "Somewhat familiar." These differences highlight how familiarity with the Early Learning Coalition varies depending on the specific county within the Northwest Florida region.

Trusted information sources

In an increasingly digital world, people rely on a variety of sources to find information they can trust. A survey question asking participants, "Where do you get information that you can trust?" revealed that health care providers (52.81%), schools (33.55%), faith leaders (27.27%), libraries (24.89%), and public health offices (19.26%) were the top trusted sources.

Additionally, the internet played a significant role, with 60.3% of the fifty-eight responses in the "Other" category mentioning social media, websites, or online resources as trusted information sources. However, some respondents (8.87%) indicated they do not go anywhere for trusted information, while others (6.71%) selected "None of the above."

Where do you go for information that you can trust?

Answer Choices	Responses	
Health care provider	52.81%	244
Schools	33.55%	155
Faith leader	27.27%	126
Libraries	24.89%	115
Public health office	19.26%	89
Nonprofit agency	18.83%	87
Government	17.75%	82
Other (please specify)	12.55%	58
I do not go anywhere	8.87%	41
None of the above	6.71%	31
	Answered	462
	Skipped	47

Website

The Early Learning Coalition website (elcnwf.org) serves as a vital resource for just over half of the surveyed respondents, with 52.58% indicating they utilize the site. An overwhelming majority of users (93%+) find the website clear, understandable, and effective for locating the information they need. The top uses are obtaining childcare referrals, learning about community events, accessing parenting support resources, applying for childcare assistance programs, enrolling in VPK pre-kindergarten, and getting developmental checklists.

Do you use the Early Learning Coalition website (<https://elcnwf.org>)?

Answer Choices	Responses	
Yes	52.58%	224
No	47.42%	202

How easy is it to use?

	Yes		No	
I can find what I am looking for	93.27%	208	5.38%	12
It is clear and understandable	93.24%	207	4.50%	10

For what purpose do you use it?

Answer Choices	Responses	
To get childcare information and referrals	60.45%	133
Find out about community events	49.55%	109
Parenting support	40.00%	88
Developmental checklist	29.09%	64
To donate	11.82%	26
Apply for childcare assistance	29.55%	65
Enroll in Voluntary Pre-Kindergarten (VPK)	25.45%	56

Other (please specify)

16.36%

36

Answered

220

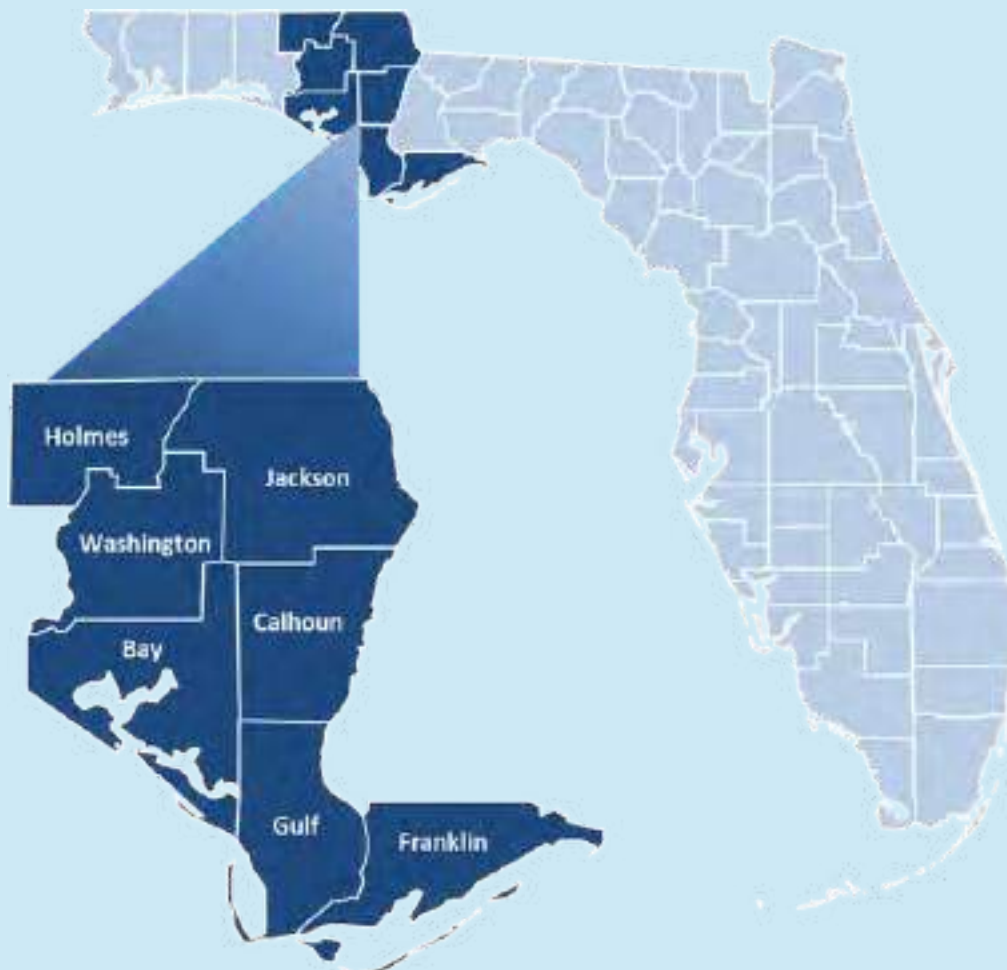
The responses indicate the website serves as a comprehensive resource utilized extensively by providers, ELC employees, and the public. Providers rely on it to find teacher training classes and workshops, access accounts and documents, help families apply for programs like School Readiness and VPK, and distribute resources to enrolled families. Parents leverage the website to enroll their children in programs like VPK, seek customer support regarding early learning services, and gather overall information. Even extended family members of enrolled children utilize the site as a resource to assist their relatives.

Overall, the survey reached a wide group of stakeholders who the ELCNWF typically interacts with and reaching stakeholders outside their usual audience. At the end of the survey respondents had the option to sign up for the newsletter and the ELCNWF received new 183 subscribers. Gaining new subscribers allows the ELCNWF to share updates, resources, and information with a wider network of interested individuals or families. Increasing the newsletter distribution can help raise awareness about the organization's mission, programs, and initiatives.

ELCNWF

Regional, County and State Data and Demographics

2024



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Northwest Florida Data and Demographics

Population

The seven counties forming the Early Learning Coalition of Northwest Florida (ELCNWF) range in size. In 2024, Franklin, Calhoun and Gulf are the smallest counties with fewer than 20,000 residents. Holmes and Washington have a population of between 20,235 and 25,799. Jackson County’s population approaches 50,000 and Bay County’s population approaches 200,000. The counties’ growth rate from 2020 to 2024 ranges from 1.7 to 12.5 percent compared with Florida’s 6.7 percent growth. Three counties –Gulf, Bay, and Washington’s growth rate ranges between 10.6 and 12.8 percent.

ELCNWF County and State Population 2020-2024

County	2020	2021	2022	2023	2024	Growth Rate 2020-2024
Bay	174,506	179,498	185,134	190,770	196,328	12.5%
Calhoun	13,707	13,518	13,465	13,470	13,475	1.7%
Franklin	12,468	12,183	12,492	12,594	12,696	1.8%
Gulf	14,259	14,462	15,299	15,693	16,087	12.8%
Holmes	19,578	19,309	19,653	19,944	20,235	3.4%
Jackson	47,096	47,119	48,255	48,622	48,989	4.0%
Washington	23,320	24,867	25,405	25,602	25,799	10.6%
Total	304,934	310,956	319,703	319,703	333,609	9.4%
Florida*	21,538,216	21,830,708	22,245,521	22,610,726	22,975,931	6.7%

Source: World Population Review.

*Source: US Census Bureau QuickFacts 2023.

Race and Ethnicity

The seven counties are racially and ethnically diverse. Compared to Florida statewide, the counties have a lower Hispanic or Latino population; most also have a lower Black/African American population and White population.

Race and Ethnicity - 2022

County	Hispanic or Latino	Black or African American	White	Asian	American Indian/ Alaskan Native	Pacific Islander	Two or More Races
Bay	7.9%	11.8%	81.1%	2.4%	0.8%	0.2%	3.5%
Calhoun	6.4%	12.2%	82.4%	0.9%	1.6%	0.2%	2.7%
Franklin	5.6%	10.3%	85.9%	0.5%	1.0%	0.1%	2.2%
Gulf	4.5%	14.2%	81.6%	0.7%	0.8%	0.7%	2.7%
Holmes	3.4%	6.9%	88.3%	0.8%	1.2%	0.2%	2.7%
Jackson	5.6%	25.8%	70.0%	0.7%	0.9%	0.2%	2.3%
Washington	4.7%	13.3%	80.6%	0.8%	1.4%	0.4%	3.4%
Florida	27.1%	17.0%	76.8%	3.1%	0.5%	0.1%	2.4%

Source: US Census Bureau QuickFacts; Census Reporter Profile Data; ACS 2022.

Place of Birth and Citizenship

The counties vary in the percent of residents that were born in the respective county from 41.1 to 66.3 percent. However, this percentage is higher than statewide (35.9 percent). The counties have a considerably smaller percent of foreign-born residents (1.7 to 7.3) than Florida (21.0%) as well as the percentage of non-citizens.

Place of Birth and Citizenship

	Bay	Calhoun	Franklin	Gulf	Holmes	Jackson	Washington	Florida
Born in County	41.1%	66.3%	58.1%	52.9%	57.1%	61.6%	60.3%	35.9%
Native Born	92.7%	96.7%	96.3%	96.6%	98.3%	97.7%	96.7%	79.0%
Foreign Born	7.3%	3.3%	3.7%	3.4%	1.7%	2.3%	3.4%	21.0%
Non-Citizens	3.5%	2.4%	2.0%	1.9%	0.7%	1.2%	2.4%	8.8%
Naturalized	3.8%	1.0%	1.8%	1.6%	1.0%	1.2%	0.9%	12.2%

Source: World Population Review.

Languages Spoken at Home

More than 90 percent of the seven-county residents speak only English at home compared with 70.2 percent statewide. Other than English, the most spoken language is Spanish.

Languages Spoken at Home

Languages	Bay	Calhoun	Franklin	Gulf	Holmes	Jackson	Washington	Florida
Speak only English	90.6%	93.3%	93.6%	94.0%	95.3%	94.2%	93.8%	70.2%
Speak Other Languages	9.4%	6.7%	6.4%	6.0%	4.7%	5.8%	6.2%	29.8%
Speak Spanish	4.9%	4.8%	4.3%	3.9%	3.6%	4.0%	3.8%	22.1%

Source: 2024 World Population Review.

Median Age

County	2024
Bay	41.2
Calhoun	41.9
Franklin	48.7
Gulf	46.5
Holmes	41.0
Jackson	42.9
Washington	42.9
Florida	42.3

Sources: World Population Review.

Families and Households

The seven counties have an average family size of 2.91 ranging from 2.40 to 3.55. Their average family size is lower than Florida's at 3.16. The seven counties average household size of 2.50 ranging from 2.19 to 3.03 is slightly lower than Florida's at 2.57.

Home Ownership

County	All Households	Married	Non-Family	Housing Units	Average Family Size	Average Household Size
Bay	74,678	35,360	25,924	108,675	2.91	2.39
Calhoun	4,448	1,971	1,687	5,668	3.55	2.69
Franklin	4,761	2,163	1,798	8,561	2.79	2.25
Gulf	5,648	2,858	1,931	9,363	2.67	2.19
Holmes	7,069	3,224	2,433	8,661	3.14	2.52
Jackson	16,880	7,578	6,043	20,150	2.40	3.03
Washington	9,095	4,398	2,853	11,031	2.89	2.45
Total	122,579	57,552	42,669	172,109	2.91	2.50
Florida	8,157,420	3,815,705	2,882,929	10,257,426	3.16	2.57

Source: 2022 American Community Survey Five Year Estimates. Source: World Population Review.

Homeowners and Renters

Between 68.6 and 80.7 percent of all households in the seven counties are homeowners and between 19.3 and 31.4 percent are renters. The percentage of homeowners in the seven counties is higher than statewide (66.5). The percentage of renters in the seven counties is lower than statewide (33.5).

Homeowner and Renters

County	All Households	Married	Non-Family
Homeowners			
Bay	68.6%	80.8%	60.3%
Calhoun	76.6%	93.0%	62.4%
Franklin	80.7%	91.2%	74.7%
Gulf	78.6%	86.3%	75.8%
Holmes	76.5%	84.1%	75.6%
Jackson	74.0%	84.1%	67.9%
Washington	78.5%	85.9%	74.2%
Florida	66.5%	79.3%	57.1%
Renters			
Bay	31.4%	19.2%	39.7%
Calhoun	23.4%	7.0%	37.6%
Franklin	19.3%	8.8%	25.3%
Gulf	21.4%	13.7%	24.2%
Holmes	23.5%	15.9%	24.4%

Jackson	26.0%	15.9%	32.1%
Washington	21.6%	14.1%	25.8%
Florida	33.5%	20.7%	42.9%

Source: World Population Review.

Educational Attainment – Degree Attainment for Adults

The educational attainment in the seven counties ranges considerably. Florida has a higher percentage of individuals with Bachelor and graduate degrees than the seven counties.

Educational Attainment

Education Attained	Bay	Calhoun	Franklin	Gulf	Holmes	Jackson	Washington	Florida
Less Than 9 th Grade	3.2%	6.9%	6.1%	4.0%	4.5%	4.7%	4.8%	4.4%
9 th to 12 th Grade	6.4%	13.8%	13.6%	10.3%	12.8%	11.1%	12.1%	6.6%
High School Graduate	28.1%	42.0%	32.2%	34.1%	45.7%	39.7%	42.6%	27.9%
Some college	23.9%	20.8%	19.6%	21.0%	20.8%	21.8%	21.9%	19.5%
Associate Degree	11.7%	5.5%	7.6%	9.2%	5.2%	8.9%	6.1%	10.1%
Bachelor’s Degree	17.2%	7.7%	11.5%	12.8%	7.7%	8.3%	7.1%	19.8%
Graduate Degree	9.5%	3.4%	9.4%	8.6%	3.3%	5.5%	5.3%	11.7%

Source: World Population Review (2024); American Community Survey, Five Year Estimates. (2018-2022).

Educational Attainment by Race/Ethnicity

Race/Ethnicity	Bay		Calhoun		Franklin	
	High School Percent	Bachelors Percent	High School Percent	Bachelors Percent	High School Percent	Bachelors Percent
Hispanic	78.4%	24.9%	77.2%	8.2%	47.0%	8.1%
Other Race	-	-	44.3%	0.0%	62.4%	22.4%
White	92.5%	27.9%	81.9%	11.2%	83.9%	22.5%
Black	82.9%	16.9%	70.2%	8.0%	67.8%	11.2%
Asian	77.4%	39.2%	31.0%	0.0%	100.0%	100.0%
Two or More Races	84.3%	21.5%	93.7%	22.8%	61.3%	12.5%
Native American	56.0%	5.9%	34.2%	2.1%	10.0%	56.3%
Pacific Islander	95.4%	11.9%	-	-	-	-

Source: World Population Review.

Educational Attainment by Race/Ethnicity

Race/Ethnicity	Gulf		Holmes		Jackson	
	High School Percent	Bachelors Percent	High School Percent	Bachelors Percent	High School Percent	Bachelors Percent
Hispanic	68.7%	8.9%	86.2%	2.6%	63.8%	11.8%
Other Race	93.5%	0%	88.3%	0.9%	68.9%	8.6%
White	90.4%	25.7%	83.9%	11.5%	88.8%	16.7%
Black	65.3%	5.5%	76.8%	2.9%	76.1%	7.9%
Asian	91.2%	78.9%	39.3%	27.9%	38.6%	10.1%
Two or More Races	90.6%	11.7%	65.2%	13.7%	77.4%	10.3%
Native American	58.4%	0%	75.4%	50.0%	89.7%	6.2%
Pacific Islander	-	-	100.0%	0%	100.0%	2.2%

Educational Attainment by Race/Ethnicity

Race/Ethnicity	Washington		Florida	
	High School Percent	Bachelors Percent	High School Percent	Bachelors Percent
Hispanic	64.5%	12.1%	81.1%	26.7%
Other Race	34.3%	8.3%	76.8%	21.5%
White	86.3%	14.1%	93.5%	35.1%
Black	69.7%	3.4%	84.6%	20.9%
Asian	75.2%	6.3%	87.2%	50.9%
Two or More Races	92.2%	13.6%	85.5%	30.7%
Native American	84.3%	13.9%	77.5%	33.5%
Pacific Islander	-	-	85.3%	21.9%

Source: World Population Review.

Average Income by Level by Education

Average income varies by education level and by county. Average incomes ranged by \$10,224 from \$30,813 (Franklin) to \$41,037 (Bay). Six of the seven counties' average income was lower than the Florida average of \$38,669.

Average Income by Education Level

Education Level	Bay	Calhoun	Franklin	Gulf	Holmes	Jackson	Washington	Florida
Overall Average	\$41,037	\$31,334	\$30,813	\$38,134	\$34,273	\$35,590	\$35,009	\$38,669
Less Than 9 th Grade	\$28,202	\$20,792	\$28,329	\$23,859	\$35,073	\$30,851	\$24,908	\$24,999
High School Graduate	\$34,634	\$27,300	\$28,448	\$27,578	\$29,504	\$31,545	\$30,015	\$30,855
Some college	\$39,489	\$36,705	\$27,614	\$41,495	\$30,504	\$34,025	\$35,008	\$36,627
Bachelor's Degree	\$51,077	\$46,250	\$45,446	\$49,079	\$47,210	\$52,747	\$52,763	\$51,092
Graduate Degree	\$73,688	\$59,157	\$63,068	\$54,052	\$54,750	\$58,056	\$68,897	\$66,765

Source: World Population Review.

Poverty

The poverty rate in the seven counties ranged from 12.2 to 22.7 percent. All but two counties' poverty rates (Bay and Gulf) were lower than Florida's 13.1 percent rate. Franklin and Washington Counties' poverty rate exceeded 20 percent.

Poverty Rate

County	Poverty Rate
Bay	12.2%
Calhoun	19.9%
Franklin	21.7%
Gulf	12.3%
Holmes	16.6%
Jackson	19.2%
Washington	22.7%
Florida	13.1%

Source: World Population Review.

Among the largest racial/ethnic groups, poverty rates in most counties were high among Black and Hispanic populations and lower among Whites.

Poverty Rate by Race/Ethnicity

	Bay	Calhoun	Franklin	Gulf	Holmes	Jackson	Washington	Florida
Hispanic	19.7%	57.9%	28.8%	26.1%	5.2%	26.9%	9.5%	15.9%
Other	21.4%	63.9%	89.8%	68.8%	14.2%	29.3%	-	18.8%
Black	19.7%	37.4%	33.6%	27.6%	54.5%	25.6%	25.8%	20.5%
Multiple	25.6%	47.1%	12.8%	7.4%	16.45	17.2%	6.9%	13.6%
White	9.6%	14.4%	19.7%	11.0%	15.7%	16.9%	23.2%	9.6%
Asian	8.9%	-	-	-	-	-	43.0%	11.3%
Native	17.5%	5.3%	-	-	0.8%	13.1%	30.9%	18.2%
Pacific Islander	6.5%	-	-	-	16.7%	-	-	16.6%
Overall Poverty Rate	12.2%	19.9%	21.7%	12.3%	16.6%	19.2%	22.7%	13.1%

Source: World Population Review.

The rate of poverty decreased with an increase in the education level.

Percent in Poverty by Education Level

Education Level	Bay	Calhoun	Franklin	Gulf	Holmes	Jackson	Washington	Florida
Less Than 9 th Grade	26.4%	24.6%	22.4%	20.1%	22.7%	29.9%	37.0%	24.2%
High School Graduate	12.9%	17.0%	25.3%	13.8%	14.5%	18.6%	22.9%	14.2%
Some college	8.6%	6.9%	13.1%	10.2%	13.3%	13.5%	13.4%	9.6%
Bachelor's Degree or Greater	4.1%	12.3%	3.0%	2.6%	6.0%	3.9%	6.3%	5.6%
Overall Poverty Rate	12.2%	19.9%	21.7%	12.3%	16.6%	19.2%	22.7%	13.1%

Source: World Population Review.

The rate of poverty decreases with employment regardless of gender. However, females have a higher poverty rate than males whether employed or unemployed.

Percent in Poverty by Gender and Employment

Gender and Employment Status	Bay	Calhoun	Franklin	Gulf	Holmes	Jackson	Washington	Florida
Male Employed	4.7%	3.4%	10.3%	13.2%	5.0%	5.7%	6.0%	5.2%
Male Unemployed	17.7%	42.3%	10.0%	46.9%	34.4%	29.4%	58.0%	25.9%
Female Employed	8.7%	12.4%	11.0%	13.2%	8.5%	8.1%	13.8%	6.8%
Female Unemployed	45.1%	23.7%	23.8%	64.5%	41.6%	47.8%	43.9%	30.5%

Source: World Population Review.

ALICE measures financial hardship. It includes households earning above the Federal Poverty Level (FPL) but not enough to afford the basics in the communities where they live.

Poverty and ALICE Households by County

County	Total Households	Poverty Households	% Households in Poverty	ALICE Households	% ALICE Households	% Below ALICE Threshold**
Bay	79,044	8,303	10.5%	24,284	30.7%	41.2%
Calhoun	4,448	844	19.0%	1,823	41.0%	60.0%
Franklin	4,761	900	18.9%	1,409	29.6%	48.5%
Gulf	5,648	789	14.0%	2,127	37.7%	51.6%
Holmes	7,069	1,265	17.9%	3,199	45.3%	63.1%
Jackson	16,880	3,130	18.5%	6,811	40.3%	58.9%
Washington	9,095	1,820	20.0%	3,418	37.6%	57.6%
Florida	8,800,279					46.0%

Source: United for ALICE, 2022.

*ALICE Households earned above the FPL but not enough to afford the basics in the communities where they live.

**% Below ALICE Threshold is Poverty Households + ALICE Households divided by total number of households.

Median household income ranges between \$41,526 and \$65,999 among the seven counties, representing a \$24,473 difference. Bay County’s median household income is similar to the Florida average of \$67,917.

Income

Income	Bay	Calhoun	Franklin	Gulf	Holmes	Jackson	Washington	Florida
Median Household Income	\$65,999	\$41,526	\$58,107	\$56,250	\$46,063	\$46,144	\$47,536	\$67,917
Per Capita Income	\$36,868	\$21,324	\$31,422	\$30,011	\$22,860	\$23,210	\$23,984	\$38,850
Families	\$77,037 (Md) \$100,394 (Mn)	\$65,776 (Md) \$74,885 (Mn)	\$65,462 (Md) \$90,856 (Mn)	\$70,654 (Md) \$92,966 (Mn)	\$55,802 (Md) \$70,695 (Mn)	\$58,273 (Md) \$76,149 (Mn)	\$60,172 (Md) \$74,095 (Mn)	\$74,237 (Md) \$102,392 (Mn)
Households	\$65,999 (Md) \$88,375 (Mn)	\$41,526 (Md) \$60,413 (Mn)	\$58,107 (Md) \$77,080 (Mn)	\$56,250 (Md) \$79,013 (Mn)	\$46,063 (Md) \$58,649 (Mn)	\$46,144 (Md) \$62,374 (Mn)	\$47,536 (Md) \$63,246 (Mn)	\$61,777 (Md) \$88,267 (Mn)
Married Families	\$93,548 (Md) \$116,446 (Mn)	\$78,861 (Md)	\$75,982 (Md)	\$82,882 (Md) -	\$60,789 (Md) -	\$71,841 (Md) -	\$72,415 (Md) -	\$88,158 (Md) \$118,266 (Mn)
Non-Families	\$46,188 (Md) \$62,134 (Mn)	\$23,920 (Md) \$33,517 (Mn)	\$34,031 (Md) \$49,691 (Mn)	\$42,595 (Md) \$50,449 (Mn)	\$27,513 (Md) \$33,295 (Mn)	\$26,274 (Md) \$35,335 (Mn)	\$28,391 (Md) \$34,926 (Mn)	\$39,047 (Md) \$58,002 (Mn)

Source: Census 2023 QuickFacts and World Population Review.

* "Md" refers to "Median;" "Mn" refers to "Mean."

Labor Force Participation

Labor force participation ranges between 41.4 and 61.9 percent across the seven counties. Bay County has the highest participation at 61.9 percent, exceeding the Florida statewide participation of 59.4 percent. Labor force participation in the remaining six counties ranges from 41.4 to 49.3 percent.

The unemployment rate in the seven counties ranges from 3.7 to 8.9 percent. With the exception of Franklin County that has an unemployment rate of 8.9 percent, the other six counties' unemployment rate is below the Florida statewide average of 5.3 percent.

Labor Force Participation

Labor Force Participation	Bay	Calhoun	Franklin	Gulf	Holmes	Jackson	Washington	Florida
Labor Force Participation	61.9%	41.4%	44.6%	42.4%	49.3%	42.5%	44.4%	59.4%
Employment Rate	57.5%	39.9%	40.6%	40.5%	46.7%	40.3%	42.3%	55.9%
Unemployment Rate	4.0%	3.7%	8.9%	4.3%	4.7%	4.7%	4.8%	5.3%

ELCNWF Target Population

This table defines the size of ELCNWF’s target population. As shown in the table below, the seven counties forming the Early Learning Coalition for Northwest Florida have a total of 33,801 children nine years old or younger. Composed of 3,247 children less than one year old, 13,156 who are between one and four years old and 17,398 who are between five and nine years old.

Population by County by Age Groups 2022

	<1		1-4		5-9		9 or younger		Total County Population	
	#	%	#	%	#	%	#	%	#	%
Bay	1,987	1.1%	7,937	4.4%	10,456	5.8%	20,380	11.3%	180,774	100%
Calhoun	117	0.9%	539	3.9%	716	5.2%	1,372	10.0%	13,690	100%
Franklin	88	0.7%	383	3.1%	512	4.1%	983	7.9%	12,501	100%
Gulf	99	0.7%	522	3.5%	806	5.4%	1,427	9.5%	15,025	100%
Holmes	185	0.9%	829	4.2%	1,103	5.6%	2,117	10.7%	19,724	100%
Jackson	506	1.1%	1,938	4.1%	2,441	5.2%	4,885	10.3%	47,322	100%
Washington	265	1.1%	1,008	4.0%	1,364	5.5%	2,637	10.6%	24,970	100%
Total	3,247	1.0%	13,156	4.2%	17,398	5.5%	33,801	10.8%	314,006	100%

Source: Florida Health Charts – Population Estimates Query System, 2022.

https://www.flhealthcharts.gov/FLQUERY_New/Population/Count.

ELCNWF Enrollment, Programs and Providers

Number of Children Served in School Readiness Program by Provider Type 2021-22 and 2022-23

	Licensed Private Centers		Licensed Family Child Care Home		Large Family Child Care Home		License Exempt Center		Total	
	2021-22	2022-23	2021-22	2022-23	2021-22	2022-23	2021-22	2022-23	2021-22	2022-23
Range	2,095-2,288	2,107-2,397	15-21	10-13	NA	5-6	133-175	140-164	2,239-2,443	2,244-2,577
Monthly Average	2,161	2,720	18	11	NA	6	148	147	2,326	2,383
Change from 2021-22 to 2022-23		559 25.9%		-7 -38.9%		+6		-1 -0.7%		57 2.5%

Source: Early Learning Coalition Northwest Florida Annual Reports FY 2021-22 and 2022-23.

De-enrollment – Number of Children De-enrolled and Major De-enrollment Reasons

Major De-Enrollment Reasons	Number of Children	
	2021-22	2022-23
Total De-Enrolled	1,174	1,170
Parent/Guardian withdrew child from program	583	593
Client did not show up for redetermination	302	254
Provider dropped child from the provider's program	66	37
Provider dismissed child for non-compliance with provider's policy	41	52
Custodian is involved in seasonal work and the child's enrollment is temporarily suspended while custodian is not working	23	31
Client is no longer eligible for services because the family income exceeds the allowable amount for eligibility	21	15
Childcare provider dismisses child due to child's behavior	21	24
Referral form referral agency has expired	17	32
Transfer to another provider record	15	17
The next Authorization period was approved	13	30
Child is no longer residing with the guardian who complete the initial application. New paperwork must be completed by new guardian	12	10
The enrollment record was updated	10	21

Source: Early Learning Coalition Northwest Florida Annual Reports FY 2021-22 and 2022-23.

Early Learning Programs by County FY 2022-23

	ELCNWF	Bay County	Calhoun	Franklin	Gulf	Holmes	Jackson	Washington
Children in School Readiness	3,758	2,147	98	34	44	223	917	295
Children Receiving high-quality early Childhood Education	295	2,147	98	34	44	223	917	-
Children in Voluntary Pre-K (4-year-olds)	1,773 (1,746 families)	985 (974 families)	58 (58 families)	55 (54 families)	64 (63 families)	145 (143 families)	306 (296 families)	160
ELC Contracted Providers	195 (123 offered School Readiness Program; 72 offered Voluntary PK)	92 (55 offer School Readiness, 37 offer Voluntary PK)	8 (3 offer School Readiness, 5 offer Voluntary PK)	6 (4 offer School readiness and 2 offer Voluntary PK)	7 (3 offer Schol Readiness and 4 offer Voluntary PK)	12 (5 offer School readiness and 7 offer Voluntary PK)	34 (20 offer School Readiness and 14 offer Voluntary PK)	10 (7 offer School Readiness; 3 offer Voluntary PK)
Parents & Caregivers Assisted with Childcare Tuition	2,240	2,240	69	28	31	117	509	108
Impact to Local Economy	\$39M	\$22.5M	\$1.5M	\$561,000	\$613,000	\$2.3 M	\$6.9M	\$3.4M

Source: Early Learning Coalition Northwest Florida (ELCNWF).

School Readiness Enrollment by Age and County – February 2024

Age	Bay County	Calhoun	Franklin	Gulf	Holmes	Jackson	Washington	Total
Infant	60	2	0	0	6	24	15	107
One Year Old	160	6	1	4	13	67	24	275
Two Years Old	224	8	6	6	19	77	31	371
Three Years Old	199	10	7	6	22	82	29	355
Four Years Old	170	11	3	3	14	63	26	290
Five Years Old	94	8	1	0	13	33	13	162
School Age	251	18	2	0	55	157	59	542
Special Needs	0	0	0	0	0	0	0	0
Total	1,158	63	20	19	142	503	197	2,102

Source: ELCNWF, February 29, 2024.

School Readiness Enrollment by Age and County – March 2024

Age	Bay County	Calhoun	Franklin	Gulf	Holmes	Jackson	Washington	Total
Infant	65	2	0	0	5	32	16	120
One Year Old	164	8	3	4	14	68	19	280
Two Years Old	203	8	5	5	20	76	30	347
Three Years Old	218	7	9	6	23	85	31	379
Four Years Old	180	11	3	3	15	63	22	297
Five Years Old	105	9	2	1	13	38	14	182
School Age	235	17	2	0	52	144	54	504
Special Needs	0	0	0	0	0	0	0	0
Total	1,170	62	24	19	142	506	186	2,109

Source: ELCNWF, March 31, 2024.

VPK Enrollment by County – February 2024

Program Type	Bay County	Calhoun	Franklin	Gulf	Holmes	Jackson	Washington	Total
School Based								
February 2024	503	28	58	28	85	168	132	1,002
March 2024	498	28	57	28	82	167	131	991
Non-School Based								
February 2024	358	26	0	47	30	97	13	571
March 2024	355	250		45	29	98	13	565
February 2024 Total	861	54	58	75	115	265	145	1,573
March 2024 Total	853	53	57	73	111	265	144	1,556

Source: ELCNWF, February 29, 2024, and March 31, 2024.

Providers

Providers by Program Type

Provider Type	Total Providers		Offered SR* Only		Offered VPK** Only		Offered Both SR and VPK	
	2021-22	2022-23	2021-22	2022-23	2021-22	2022-23	2021-22	2022-23
Licensed Private Center	78	83	40	47	6	4	32	32
Licensed Exempt Center	6	6	6	6	0	0	0	0
Large Family Child Care Home	-	2	-	2	-	0	-	0
Licensed Family Child Care Home	3	2	3	2	0	0	0	0
Private School	1	1	0	0	1	1	0	0
Public School	33	33	0	0	33	33	0	0

*SR refers to School Readiness.

**VPK refers to Voluntary Pre-Kindergarten.

Source: Early Learning Coalition Northwest Florida Annual Reports FY 2021-22 and 2022-23.

All Providers by County – March 2024

County	Center	Head Start	Family Child Care Home	School Age Program	Faith-based Exempt	Public School Charter School	Private School	Total
Bay	43	4	4	5	1	15	1	73
Calhoun	2	1	0	0	0	3	0	6
Franklin	1	1	0	0	0	2	0	4
Gulf	1	2	0	0	0	2	0	5
Holmes	5	0	0	0	0	4	0	9
Jackson	14	0	0	1	0	5	0	20
Washington	5	0	0	0	0	2	0	7
Total	71	8	4	6	1	33	1	124

Source: ELCNWF, March 31, 2024.

School Readiness Providers by County – March 2024

County	Center	Head Start	Family Child Care Home	School Age Program	Faith-based Exempt	Public School Charter School	Private School	Total
Bay	40	4	4	5	1	0	0	54
Calhoun	2	1	0	0	0	0	0	3
Franklin	1	1	0	0	0	0	0	2
Gulf	1	2	0	0	0	0	0	3
Holmes	5	0	0	0	0	0	0	5
Jackson	14	0	0	0	0	0	0	15
Washington	4	0	0	1	0	0	0	4
Total	67	8	4	5	1	0	0	86

Source: ELCNWF, March 31, 2024.

VPK Providers by County – March 2024

County	Center	Head Start	Family Child Care Home	School Age Program	Faith-based Exempt	Public School Charter School	Private School	Total
Bay	21	2	0	0	0	15	1	39
Calhoun	1	1	0	0	0	3	0	5
Franklin	0	0	0	0	0	2	0	2
Gulf	1	2	0	0	0	2	0	5
Holmes	3	0	0	0	0	4	0	7
Jackson	9	0	0	0	0	5	0	14
Washington	1	0	0	0	0	2	0	3
Total	36	5	0	0	0	33	1	75

Source: ELCNWF, March 31, 2024.

Readiness for Kindergarten by County

District Name	School #	School Name	Number of Test Takers	Number *"Ready for Kindergarten"	Total County Percentage *"Ready for Kindergarten"	Percentage *"Ready for Kindergarten"
BAY	521	PATRONIS ELEMENTARY SCHOOL	102	52		51.0%
BAY	251	WALLER ELEMENTARY SCHOOL	77	27		35.1%
BAY	391	OSCAR PATTERSON ACADEMY	89	23		25.8%
BAY	541	DEANE BOZEMAN SCHOOL	53	34		64.2%
BAY	81	HUTCHISON BEACH ELEMENTARY SCHOOL	100	45		45.0%
BAY	91	CEDAR GROVE ELEMENTARY SCHOOL	83	20		24.1%
BAY	461	DEER POINT ELEMENTARY SCHOOL	98	45		45.9%
BAY	2701	RISING LEADERS ACADEMY	36	25		69.4%
BAY	801	PALM BAY ELEMENTARY SCHOOL	60	22		36.7%
BAY	211	PARKER ELEMENTARY SCHOOL	72	32		44.4%
BAY	101	CALLAWAY ELEMENTARY SCHOOL	78	28		35.9%
BAY	221	SOUTHPORT ELEMENTARY SCHOOL	89	30		33.7%
BAY	701	BAY HAVEN CHARTER ACADEMY	124	79		63.7%
BAY	171	LYNN HAVEN ELEMENTARY SCHOOL	112	54		48.2%
BAY	241	ST. ANDREW SCHOOL AT OAKLAND TERRACE	*	*		*
BAY	131	LUCILLE MOORE ELEMENTARY SCHL	76	19		25.0%
BAY	2711	UNIVERSITY ACADEMY SABL INC	58	50		86.2%
BAY	511	TOMMY SMITH ELEMENTARY SCHOOL	103	46		44.7%
BAY	262	WEST BAY ELEMENTARY SCHOOL	50	25		50.0%
BAY	571	BREAKFAST POINT ACADEMY	82	40		48.8%
BAY	111	MERRIAM CHERRY STREET ELEM.	44	15		34.1%
BAY	611	A. GARY WALSINGHAM ACADEMY	84	57		67.9%

District Name	School #	School Name	Number of Test Takers	Number *"Ready for Kindergarten"	Total County Percentage *"Ready for Kindergarten"	Percentage *"Ready for Kindergarten"
BAY	501	TYNDALL ACADEMY	99	55		55.6%
BAY	471	NORTHSIDE ELEMENTARY SCHOOL	63	29		46.0%
BAY	751	NORTH BAY HAVEN CHARTER ACADEMY ES	108	76		70.4%
BAY	151	HILAND PARK ELEMENTARY SCHOOL	94	34		36.2%
TOTAL			2,034	962	47.3%	Range=25.0%-86.2%
CALHOUN	101	ALTHA PUBLIC SCHOOL	59	38		64.4%
CALHOUN	91	CARR ELEMENTARY & MIDDLE SCHOOL	34	20		58.8%
CALHOUN	131	BLOUNTSTOWN ELEMENTARY SCHOOL	67	32		47.8%
TOTAL			160	90	56.3%	Range=47.8%-64.4%
FRANKLIN	91	FRANKLIN COUNTY SCHOOL	58	20		34.5%
FRANKLIN	9009	APALACHICOLA BAY CHARTER SCHOOL	32	16		50.0%
TOTAL			90	36	40.0%	Range=34.5%-50.0%
GULF	22	WEWAHITCHKA ELEMENTARY SCHOOL	65	28		43.1%
GULF	51	PORT ST. JOE ELEMENTARY SCHOOL	46	16		34.8%
TOTAL			111	44	39.6%	Range=34.8%-43.1%
HOLMES	262	BONIFAY K-8 SCHOOL	121	52		43.0%
HOLMES	41	BETHLEHEM HIGH SCHOOL	29	17		58.6%
HOLMES	111	PONCE DE LEON ELEM. SCHOOL	39	9		23.1%
HOLMES	31	POPLAR SPRINGS HIGH SCHOOL	31	11		35.5%
TOTAL			220	89	40.5%	Range = 23.2%-58.6%
JACKSON	171	SNEADS ELEMENTARY SCHOOL	118	50		42.4%
JACKSON	491	GRACEVILLE SCHOOL	40	15		37.5%
JACKSON	121	MALONE SCHOOL	46	20		43.5%
JACKSON	202	HOPE SCHOOL	*	*		*
JACKSON	51	MARIANNA K-8 SCHOOL	243	101		41.6%

District Name	School #	School Name	Number of Test Takers	Number *"Ready for Kindergarten"	Total County Percentage *"Ready for Kindergarten"	Percentage *"Ready for Kindergarten"
JACKSON	271	COTTONDALE ELEMENTARY SCHOOL	72	29		40.3%
JACKSON	212	JACKSON ALTERNATIVE SCHOOL	*	*		*
TOTAL			519	215	41.4%	Range = 37.5%-43.5%
WASHINGTON	123	WASHINGTON ACAD OF VARYING EXCEPTIONALITIES	*	*		*
WASHINGTON	151	VERNON ELEMENTARY SCHOOL	96	52		54.2%
WASHINGTON	41	KATE M. SMITH ELEMENTARY SCHOOL	154	74		48.1%
TOTAL			250	126	50.4%	Range = 48.1%-54.2%
TOTAL ELCNWF			3,384	1,562	46.2%	

Source: Florida Department of Education.

*Scoring 690+ on FAST (Florida Assessment of Student Thinking) Star Early Literacy Assessment, Fall 2023.

County	Sum of Number of Test Takers	Sum of RFK +690	Average of Percentage "Ready for Kindergarten"
BAY	2034	962	47.51%
CALHOUN	160	90	57.00%
FRANKLIN	90	36	42.24%
GULF	111	44	38.93%
HOLMES	220	89	40.04%
JACKSON	519	215	41.04%
WASHINGTON	250	126	51.11%
Grand Total	3384	1562	46.25%

ELCNWF Bay County Profile

Population

Bay County and State Population 2020-2024

	2020	2021	2022	2023	2024	Growth Rate 2020-2024
Bay	174,506	179,498	185,134	190,770	196,328	12.5%
Florida	21,538,216	21,830,708	22,245,521	22,610,726	22,975,931	6.7%

Source: World Population Review.

Race and Ethnicity

Race and Ethnicity – Bay County and State - 2022

Race and Ethnicity	Bay	Florida
Hispanic or Latino	7.9%	27.1%
Black or African American	11.8%	17.0%
White	81.1%	76.8%
Asian	2.4%	3.1%
American Indian/Alaskan Native	0.8%	0.5%
Pacific Islander	0.2%	0.1%
Two or More Races	3.5%	2.4%

Source: US census Bureau QuickFacts; Census Reporter Profile Data, ACS 2022.

Place of Birth and Citizenship

Place of Birth – Bay County and State

Place of Birth	Bay	Florida
Born in County	41.1%	35.9%
Native Born	92.7%	79.0%
Foreign Born	7.3%	21.0%
Non-Citizens	3.5%	8.8%
Naturalized	3.8%	12.2%

Source: World Population Review.

Languages Spoken at Home

Languages Spoken at Home – Bay County and State

Languages	Bay	Florida
Speak only English	90.6%	70.2%
Speak Other Languages	9.4%	29.8%
Speak Spanish	4.9%	22.1%

Source: World Population Review.

Median Age

	Median Age
Bay	41.2
Florida	42.3

Source: World Population Review.

Families and Households

Home Ownership - Bay County and State

	All Households	Married	Non-Family	Housing Units	Average Family Size	Average Household Size
Bay	74,678	35,360	25,924	108,675	2.91	3.16
Florida	8,157,420	3,815,705	2,882,929	10,257,426	2.39	2.57

Source: 2022 American Community Survey, Five Year Estimates.

Source: World Population Review.

Homeowners and Renters

Homeowners and Renters – Bay County and State

	All Households	Married	Non-Family
Homeowner			
Bay	68.6%	80.8%	60.3%
Florida	66.5%	79.3%	57.1%
Renters			
Bay	31.4%	19.2%	39.7%
Florida	33.5%	20.7%	42.9%

Source: 2022 American Community Survey, Five Year Estimates.

Source: Source: World Population Review.

Educational Attainment – Degree Attainment for Adults

Educational Attainment – Bay County and State

Educational Attainment	Bay	Florida
Less Than 9 th Grade	3.2%	4.4%
9 th to 12 th Grade	6.4%	6.6%
High School Graduate	28.1%	27.9%
Some college	23.9%	19.5%
Associate Degree	11.7%	10.1%
Bachelor’s Degree	17.2%	19.8%
Graduate Degree	9.5%	11.7%

Source: World Population Review; ACS Five Year Estimates (2018-2022).

Educational Attainment by Race/Ethnicity – Bay County and State

Race/Ethnicity	Bay		Florida	
	High School Percent	Bachelors Percent	High School Percent	Bachelors Percent
Hispanic	78.4%	24.9%	81.1%	26.7%
Other Race	-	-	76.8%	21.5%
White	92.5%	27.9%	93.5%	35.1%
Black	82.9%	16.9%	84.6%	20.9%
Asian	77.4%	39.2%	87.2%	50.9%
Two or More Races	84.3%	21.5%	85.5%	30.7%
Native American	56.0%	5.9%	77.5%	33.5%
Pacific Islander	95.4%	11.9%	85.3%	21.9%

Source: World Population Review.

Average Income by Level of Education

Education Level - Bay County and State

Education Level	Bay	Florida
Overall Average	\$41,037	\$38,669
Less Than 9 th Grade	\$28,202	\$24,999
High School Graduate	\$34,634	\$30,855
Some college	\$39,49	\$36,627
Bachelor’s Degree	\$51,077	\$51,092
Graduate Degree	\$73,688	\$66,765

Source: World Population Review.

Poverty

Poverty Rate – Bay County and State

	Poverty Rate
Bay	12.2%
Florida	13.1%

Source: World Population Review.

Poverty Rate by Race/Ethnicity – Bay County and State

Race/Ethnicity	Bay	Florida
Hispanic	19.7%	15.9%
Other	21.4%	18.8%
Black	19.7%	20.5%
Multiple	25.6%	13.6%
White	9.6%	9.6%
Asian	8.9%	11.3%
Native	17.5%	18.2%
Pacific Islander	6.5%	16.6%
Overall Poverty Rate	12.2%	13.1%

Source: World Population Review.

Percent in Poverty by Education Level – Bay County and State

Education Level	Bay	Florida
Less Than 9 th Grade	26.4%	24.2%
High School Graduate	12.9%	14.2%
Some college	8.6%	9.6%
Bachelor's Degree or Greater	4.1%	5.6%
Overall Poverty Rate	12.2%	13.1%

Source: World Population Review.

Percent in Poverty by Gender and Employment – Bay County and State

Gender and Employment	Bay	Florida
Male Employed	4.70%	5.20%
Male Unemployed	17.70%	25.90%
Female Employed	8.70%	6.80%
Female Unemployed	45.10%	30.50%

Source: World Population Review.

Poverty and ALICE Households - Bay County and State

	Total Households	Poverty Households	% Households in Poverty	ALICE Households	% ALICE Households	% Below ALICE Threshold*
Bay	79,044	8,303	10.5%	24,284	30.7%	41.2%
Florida	8,800,279					46.0%

Source: United for ALICE, 2022.

*ALICE Households earned above the FPL but not enough to afford the basics in the communities where they live.

**% Below ALICE Threshold is Poverty Households + ALICE Households divided by total number of households

Income – Bay County and State

Income	Bay	Florida
Median Household Income	\$65,999	\$67,917
Per Capita Income	\$36,868	\$38,850
Families	\$77,037 (Md)	\$74,237 (Md)
	\$100,394 (Mn)	\$102,392 (Mn)
Households	\$65,999 (Md)	\$61,777 (Md)
	\$88,375 (Mn)	\$88,267 (Mn)
Married Families	\$93,548 (Md)	\$88,158 (Md)
	\$116,446 (Mn)	\$118,266 (Mn)
Non-Families	\$46,188 (Md)	\$39,047 (Md)
	\$62,134 (Mn)	\$58,002 (Mn)

Source: US Census 2023 QuickFacts and World Population Review.

*“Md” refers to “Median” and “Mn” refers to “Mean.”

Labor Force Participation

Labor Force Participation – Bay County and State

Labor Force Participation	Bay	Florida
Labor Force Participation	61.90%	59.40%
Employment Rate	57.50%	55.90%
Unemployment Rate	4.00%	5.30%

Population by Age Groups - Bay County and ELCNWF Total - 2022

	<1		1-4		5-9		9 or younger		Total County Population	
	#	%	#	%	#	%	#	%	#	%
Bay	1,987	1.3%	7,937	5.4%	10,456	7.0%	20,380	13.6%	150,209	100%
Total ELCNWF	3,247	1.2%	13,156	5.0%	17,398	6.7%	33,801	12.9%	261,203	100%

Source: Florida Health Charts – Population Estimates Query System, 2022.

https://www.flhealthcharts.gov/FLQUERY_New/Population/Count

Early Learning Programs by ELCNWF and Bay County - FY 2022-23

	ELCNWF	Bay
Children in School Readiness	3,758	2,147
Children Receiving high-quality early Childhood Education	295	2,147
Children in Voluntary Pre-K (4-year-olds)	1,773 (1,746 families)	985 (974 families)
ELC Contracted Providers	195 (123 offered School Readiness Program; 72 offered Voluntary PK)	92 (55 offer School Readiness, 37 offer Voluntary PK)
Parents & Caregivers Assisted with Childcare Tuition	2,240	2,240
Impact to Local Economy	\$39M	\$22.5M

Source: Early Learning Coalition Northwest Florida (ELCNWF).

School Readiness Enrollment by Age – Bay County and ELCNWF Total – February 2024

Age	Bay County	Total
Infant	60	107
One Year Old	160	275
Two Years Old	224	371
Three Years Old	199	355
Four Years Old	170	290
Five Years Old	94	162
School Age	251	542
Special Needs	0	0
Total	1,158	2,102

Source: ELCNWF, February 29, 2024.

School Readiness Enrollment by Age - Bay County and ELCNWF Total – March 2024

Age	Bay County	Total
Infant	65	120
One Year Old	164	280
Two Years Old	203	347
Three Years Old	218	379
Four Years Old	180	297
Five Years Old	105	182
School Age	235	504
Special Needs	0	0
Total	1,170	2,109

Source: ELCNWF, March 31, 2024.

VPK Enrollment - Bay County and ELCNWF Total – February 2024

Program Type	Bay County	Total
School Based		
February 2024	503	1,002
March 2024	498	991
Non-School Based		
February 2024	358	571
March 2024	355	565
February 2024 Total	861	1,573
March 2024 Total	853	1,556

Source: ELCNWF, February 29, 2024, and March 31, 2024.

All Providers - Bay County and ELCNWF Total – March 2024

	Center	Head Start	Family Child Care Home	School Age Program	Faith-based Exempt	Public School Charter School	Private School	Total
Bay	43	4	4	5	1	15	1	73
Total	71	8	4	6	1	33	1	124

Source: ELCNWF, March 31, 2024.

School Readiness Providers - Bay County and ELCNWF Total – March 2024

	Center	Head Start	Family Child Care Home	School Age Program	Faith-based Exempt	Public School Charter School	Private School	Total
Bay	40	4	4	5	1	0	0	54
Total	67	8	4	5	1	0	0	86

Source: ELCNWF, March 31, 2024.

VPK Providers – Bay County and ELCNWF Total – March 2024

	Center	Head Start	Family Child Care Home	School Age Program	Faith-based Exempt	Public School Charter School	Private School	Total
Bay	21	2	0	0	0	15	1	39
Total	36	5	0	0	0	33	1	75

Source: ELCNWF, March 31, 2024.

Readiness for Kindergarten*, Bay County

School #	School Name	Number of Test Takers	Number "Ready for Kindergarten" (Scoring 690+ on FAST Star Early Literacy Assessment)	Total County Percentage "Ready for Kindergarten"	Percentage "Ready for Kindergarten" (Scoring 690+ on FAST Star Early Literacy Assessment)
521	PATRONIS ELEMENTARY SCHOOL	102	52		51.0%
251	WALLER ELEMENTARY SCHOOL	77	27		35.1%
391	OSCAR PATTERSON ACADEMY	89	23		25.8%
541	DEANE BOZEMAN SCHOOL	53	34		64.2%
81	HUTCHISON BEACH ELEMENTARY SCHOOL	100	45		45.0%
91	CEDAR GROVE ELEMENTARY SCHOOL	83	20		24.1%
461	DEER POINT ELEMENTARY SCHOOL	98	45		45.9%
2701	RISING LEADERS ACADEMY	36	25		69.4%
801	PALM BAY ELEMENTARY SCHOOL	60	22		36.7%
211	PARKER ELEMENTARY SCHOOL	72	32		44.4%
101	CALLAWAY ELEMENTARY SCHOOL	78	28		35.9%
221	SOUTHPORT ELEMENTARY SCHOOL	89	30		33.7%
701	BAY HAVEN CHARTER ACADEMY	124	79		63.7%
171	LYNN HAVEN ELEMENTARY SCHOOL	112	54		48.2%

School #	School Name	Number of Test Takers	Number "Ready for Kindergarten" (Scoring 690+ on FAST Star Early Literacy Assessment)	Total County Percentage "Ready for Kindergarten"	Percentage "Ready for Kindergarten" (Scoring 690+ on FAST Star Early Literacy Assessment)
241	ST. ANDREW SCHOOL AT OAKLAND TERRACE	*	*		*
131	LUCILLE MOORE ELEMENTARY SCHL	76	19		25.0%
2711	UNIVERSITY ACADEMY SABL INC	58	50		86.2%
511	TOMMY SMITH ELEMENTARY SCHOOL	103	46		44.7%
262	WEST BAY ELEMENTARY SCHOOL	50	25		50.0%
571	BREAKFAST POINT ACADEMY	82	40		48.8%
111	MERRIAM CHERRY STREET ELEM.	44	15		34.1%
611	A. GARY WALSINGHAM ACADEMY	84	57		67.9%
501	TYNDALL ACADEMY	99	55		55.6%
471	NORTHSIDE ELEMENTARY SCHOOL	63	29		46.0%
751	NORTH BAY HAVEN CHARTER ACADEMY ES	108	76		70.4%
151	HILAND PARK ELEMENTARY SCHOOL	94	34		36.2%
	TOTAL	2,034	962	47.3%	Range=25.0%-86.2%
	TOTAL ELCNWF	3,384	1,562	46.2%	

Source: Florida Department of Education.

*Scoring 690+ on FAST (Florida Assessment of Student Thinking) Star Early Literacy Assessment, Fall 2023.

ELCNWF Calhoun County Profile

Population

Calhoun County and State Population 2020-2024

	2020	2021	2022	2023	2024	Growth Rate 2020-2024
Calhoun	13,707	13,518	13,465	13,470	13,475	1.7%
Florida*	21,538,216	21,830,708	22,245,521	22,610,726	22,975,931	6.7%

Source: World Population Review.

*Source: US Census Bureau QuickFacts 2023.

Race and Ethnicity

Race and Ethnicity – Calhoun County and State - 2022

	Hispanic or Latino	Black or African American	White	Asian	American Indian/Alaskan Native	Pacific Islander	Two or More Races
Calhoun	6.4%	12.2%	82.4%	0.9%	1.6%	0.2%	2.7%
Florida	27.1%	17.0%	76.8%	3.1%	0.5%	0.1%	2.4%

Source: US Census Bureau QuickFacts; Census Reporter Profile Data; ACS 2022.

Place of Birth and Citizenship

Place of Birth - Calhoun County and State

Place of Birth	Calhoun	Florida
Born in County	66.3%	35.9%
Native Born	96.7%	79.0%
Foreign Born	3.3%	21.0%
Non-Citizens	2.4%	8.8%
Naturalized	1.0%	12.2%

Source: World Population Review.

Languages Spoken at Home

Languages Spoken at Home - Calhoun County and State

Languages	Calhoun	Florida
Speak only English	93.3%	70.2%
Speak Other Languages	6.7%	29.8%
Speak Spanish	4.8%	22.1%

Source: 2024 World Population Review.

Median Age

Median Age - Calhoun County and State

	Median Age
Calhoun	41.9
Florida	42.3

Sources: World Population Review.

Families and Households

Home Ownership - Calhoun County and State

	All Households	Married	Non-Family	Housing Units	Average Family Size	Average Household Size
Calhoun	4,448	1,971	1,687	5,668	3.55	2.69
Florida	8,157,420	3,815,705	2,882,929	10,257,426	3.16	2.57

Source: 2022 American Community Survey, Five Year Estimates.

Source: World Population Review.

Homeowners and Renters

Homeowners and Renter - Calhoun County and State

	All Households	Married	Non-Family
Homeowners			
Calhoun	76.6%	93.0%	62.4%
Florida	66.5%	79.3%	57.1%
Renters			
Calhoun	23.4%	7.0%	37.6%
Florida	33.5%	20.7%	42.9%

Source: World Population Review.

Educational Attainment – Degree Attainment for Adults

Educational Attainment - Calhoun County and State

Educational Attainment	Calhoun	Florida
Less Than 9 th Grade	6.9%	4.4%
9 th to 12 th Grade	13.8%	6.6%
High School Graduate	42.0%	27.9%
Some college	20.8%	19.5%
Associate Degree	5.5%	10.1%
Bachelor's Degree	7.7%	19.8%
Graduate Degree	3.4%	11.7%

Source: World Population Review (2024); American Community Survey, Five Year Estimates (2018-2022).

Educational Attainment by Race/Ethnicity - Calhoun County and State

Race/Ethnicity	Calhoun		Florida	
	High School Percent	Bachelors Percent	High School Percent	Bachelors Percent
Hispanic	77.2%	8.2%	81.1%	26.7%
Other Race	44.3%	0.0%	76.8%	21.5%
White	81.9%	11.2%	93.5%	35.1%
Black	70.2%	8.0%	84.6%	20.9%
Asian	31.0%	0.0%	87.2%	50.9%
Two or More Races	93.7%	22.8%	85.5%	30.7%
Native American	34.2%	2.1%	77.5%	33.5%
Pacific Islander	-	-	85.3%	21.9%

Source: World Population Review.

Average Income by Level of Education

Education Level - Calhoun County and State

Education Level	Calhoun	Florida
Overall Average	\$31,334	\$38,669
Less Than 9 th Grade	\$20,792	\$24,999
High School Graduate	\$27,300	\$30,855
Some college	\$36,705	\$36,627
Bachelor's Degree	\$46,250	\$51,092
Graduate Degree	\$59,157	\$66,765

Source: World Population Review.

Poverty

Poverty Rate - Calhoun County and State

	Poverty Rate
Calhoun	19.9%
Florida	13.1%

Source: World Population Review.

Poverty Rate by Race/Ethnicity - Calhoun County and State

Race/Ethnicity	Calhoun	Florida
Hispanic	57.9%	15.9%
Other	63.9%	18.8%
Black	37.4%	20.5%
Multiple	47.1%	13.6%
White	14.4%	9.6%
Asian	-	11.3%
Native	5.3%	18.2%
Pacific Islander	-	16.6%
Overall Poverty Rate	19.9%	13.1%

Source: World Population Review.

Percent in Poverty by Education Level - Calhoun County and State

Education Level	Calhoun	Florida
Less Than 9 th Grade	24.6%	24.2%
High School Graduate	17.0%	14.2%
Some college	6.9%	9.6%
Bachelor’s Degree or Greater	12.3%	5.6%
Overall Poverty Rate	19.9%	13.1%

Source: World Population Review.

Percent in Poverty by Gender and Employment - Calhoun County and State

Gender and Employment Status	Calhoun	Florida
Male Employed	3.4%	5.2%
Male Unemployed	42.3%	25.9%
Female Employed	12.4%	6.8%
Female Unemployed	23.7%	30.5%

Source: World Population Review.

ALICE

Poverty and ALICE Households - Calhoun County and State

	Total Households	Poverty Households	% Households in Poverty	ALICE Households	% ALICE Households	% Below ALICE Threshold**
Calhoun	4,448	844	19.0%	1,823	41.0%	60%
Florida	8,800,279					46%

Source: United for ALICE, 2022.

*ALICE Households earned above the FPL but not enough to afford the basics in the communities where they live.

**% Below ALICE Threshold is Poverty Households + ALICE Households divided by total number of households.

Income - Calhoun County and State

Income	Calhoun	Florida
Median Household Income	\$41,526	\$67,917
Per Capita Income	\$21,324	\$38,850
Families	\$65,776 (Md) \$74,885 (Mn)	\$74,237 (Md) \$102,392 (Mn)
Households	\$41,526 (Md) \$60,413 (Mn)	\$61,777 (Md) \$88,267 (Mn)
Married Families	\$78,861 (Md)	\$88,158 (Md) \$118,266 (Mn)
Non-Families	\$23,920 (Md) \$33,517 (Mn)	\$39,047 (Md) \$58,002 (Mn)

Source: Census 2023 QuickFacts and World Population Review.

** Md” refers to “Median;” Mn” refers to “Mean.”

Labor Force Participation

Labor Force participation - Calhoun County and State

Labor Force Participation	Calhoun	Florida
Labor Force Participation	41.4%	59.4%
Employment Rate	39.9%	55.9%
Unemployment Rate	3.7%	5.3%

Source: World Population Review.

ELCNWF Target Population

Population by Age Groups - Calhoun County and ELCNWF Total- 2022

	<1		1-4		5-9		9 or younger		Total County Population	
	#	%	#	%	#	%	#	%	#	%
Calhoun	117	0.9%	539	3.9%	716	5.2%	1,372	10.0%	13,690	100%
Total ELCNWF	3,247	1.0%	13,156	4.2%	17,398	5.5%	33,801	10.8%	314,006	100%

Source: Florida Health Charts – Population Estimates Query System, 2022.

https://www.flhealthcharts.gov/FLQUERY_New/Population/Count.

Early Learning Programs by ELCNWF and Calhoun County - FY 2022-23

	ELCNWF	Calhoun
Children in School Readiness	3,758	98
Children Receiving high-quality early Childhood Education	295	98
Children in Voluntary Pre-K (4-year-olds)	1,773 (1,746 families)	58 (58 families)
ELC Contracted Providers	195 (123 offered School Readiness Program; 72 offered Voluntary PK)	8 (3 offer School Readiness, 5 offer Voluntary PK)
Parents & Caregivers Assisted with Childcare Tuition	2,240	69
Impact to Local Economy	\$39M	\$1.5M

Source: Early Learning Coalition Northwest Florida (ELCNWF).

School Readiness Enrollment by Age - Calhoun County and ELCNWF – February 2024

Age	Calhoun	Total
Infant	2	107
One Year Old	6	275
Two Years Old	8	371
Three Years Old	10	355
Four Years Old	11	290
Five Years Old	8	162
School Age	18	542
Special Needs	0	0
Total	63	2,102

Source: ELCNWF, February 29, 2024.

School Readiness Enrollment by Age - Calhoun County and ELCNWF – March 2024

Age	Calhoun	Total
Infant	2	120
One Year Old	8	280
Two Years Old	8	347
Three Years Old	7	379
Four Years Old	11	297
Five Years Old	9	182
School Age	17	504
Special Needs	0	0
Total	62	2,109

Source: ELCNWF, March 31, 2024.

VPK Enrollment - Calhoun County and ELCNWF – February 2024

Program Type	Calhoun	Total
School Based		
February 2024	28	1,002
March 2024	28	991
Non-School Based		
February 2024	26	571
March 2024	250	565
February 2024 Total	54	1,573
March 2024 Total	53	1,556

Source: ELCNWF, February 29, 2024, and March 31, 2024.

All Providers - Calhoun County and ELCNWF – March 2024

	Center	Head Start	Family Child Care Home	School Age Program	Faith-based Exempt	Public School Charter School	Private School	Total
Calhoun	2	1	0	0	0	3	0	6
Total	71	8	4	6	1	33	1	124

Source: ELCNWF, March 31, 2024.

School Readiness Providers - Calhoun County and ELCNWF – March 2024

	Center	Head Start	Family Child Care Home	School Age Program		Faith-based Exempt	Public School Charter School	Private School	Total
Calhoun	2	1	0	0		0	0	0	3
Total	67	8	4	5		1	0	0	86

Source: ELCNWF, March 31, 2024.

VPK Providers - Calhoun County and ELCNWF – March 2024

	Center	Head Start	Family Child Care Home	School Age Program	Faith-based Exempt	Public School Charter School	Private School	Total
Calhoun	1	1	0	0	0	3	0	5
Total	36	5	0	0	0	33	1	75

Source: ELCNWF, March 31, 2024.

Readiness for Kindergarten* - Calhoun County

School #	School Name	Number of Test Takers	Number "Ready for Kindergarten"	Total County Percentage "Ready for Kindergarten"	Percentage "Ready for Kindergarten"
101	ALTHA PUBLIC SCHOOL	59	38		64.4%
91	CARR ELEMENTARY & MIDDLE SCHOOL	34	20		58.8%
131	BLOUNTSTOWN ELEMENTARY SCHOOL	67	32		47.8%
	TOTAL	160	90	56.3%	Range=47.8%-64.4%
	TOTAL ELCNWF	3,384	1,562	46.2%	

Source: Florida Department of Education.

*Scoring 690+ on FAST (Florida Assessment of Student Thinking) Star Early Literacy Assessment, Fall 2023.

ELCNWF Franklin County Profile

Population

Franklin County and State Population 2020-2024

	2020	2021	2022	2023	2024	Growth Rate 2020-2024
Franklin	12,468	12,183	12,492	12,594	12,696	1.8%
Florida*	21,538,216	21,830,708	22,245,521	22,610,726	22,975,931	6.7%

Source: World Population Review.

*Source: US Census Bureau QuickFacts 2023.

Race and Ethnicity

Race and Ethnicity - Franklin County and State - 2022

	Hispanic or Latino	Black or African American	White	Asian	American Indian/Alaskan Native	Pacific Islander	Two or More Races
Franklin	5.6%	10.3%	85.9%	0.5%	1.0%	0.1%	2.2%
Florida	27.1%	17.0%	76.8%	3.1%	0.5%	0.1%	2.4%

Source: US Census Bureau QuickFacts; Census Reporter Profile Data; ACS 2022.

Place of Birth and Citizenship

Place of Birth - Franklin County and State

Place of Birth	Franklin	Florida
Born in County	58.1%	35.9%
Native Born	96.3%	79.0%
Foreign Born	3.7%	21.0%
Non-Citizens	2.0%	8.8%
Naturalized	1.8%	12.2%

Source: World Population Review.

Languages Spoken at Home

Language Spoken at Home - Franklin County and State

Languages	Franklin	Florida
Speak only English	93.6%	70.2%
Speak Other Languages	6.4%	29.8%
Speak Spanish	4.3%	22.1%

Source: 2024 World Population Review.

Median Age

Median Age - Franklin County and State

	Median Age
Franklin	48.7
Florida	42.3

Sources: World Population Review.

Families and Households

Home Ownership - Franklin County and State

	All Households	Married	Non-Family	Housing Units	Average Family Size	Average Household Size
Franklin	4,761	2,163	1,798	8,561	2.79	2.25
Florida	8,157,420	3,815,705	2,882,929	10,257,426	3.16	2.57

Source: 2022 American Community Survey, Five Year Estimates.

Source: World Population Review.

Homeowners and Renters

Homeowners and Renters - Franklin County and State

	All Households	Married	Non-Family
Homeowners			
Franklin	80.7%	91.2%	74.7%
Florida	66.5%	79.3%	57.1%
Renters			
Franklin	19.3%	8.8%	25.3%
Florida	33.5%	20.7%	42.9%

Source: World Population Review.

Educational Attainment – Degree Attainment for Adults

Educational Attainment- Franklin County and State

Educational Attainment	Franklin	Florida
Less Than 9 th Grade	6.1%	4.4%
9 th to 12 th Grade	13.6%	6.6%
High School Graduate	32.2%	27.9%
Some college	19.6%	19.5%
Associate degree	7.6%	10.1%
Bachelor's Degree	11.5%	19.8%
Graduate Degree	9.4%	11.7%

Source: World Population Review; American Community Survey, Five Year Estimates (2018-2022).

Educational Attainment by Race/Ethnicity - Franklin County and State

Race/Ethnicity	Franklin		Florida	
	High School Percent	Bachelors Percent	High School Percent	Bachelors Percent
Hispanic	47.0%	8.1%	81.1%	26.7%
Other Race	62.4%	22.4%	76.8%	21.5%
White	83.9%	22.5%	93.5%	35.1%
Black	67.8%	11.2%	84.6%	20.9%
Asian	100.0%	100.0%	87.2%	50.9%
Two or More Races	61.3%	12.5%	85.5%	30.7%
Native American	10.0%	56.3%	77.5%	33.5%
Pacific Islander	-	-	85.3%	21.9%

Source: World Population Review.

Average Income by Level of Education

Average Income by Level of Education - Franklin County and State

Education Level	Franklin	Florida
Overall Average	\$30,813	\$38,669
Less Than 9 th Grade	\$28,329	\$24,999
High School Graduate	\$28,448	\$30,855
Some college	\$27,614	\$36,627
Bachelor's Degree	\$45,446	\$51,092
Graduate Degree	\$63,068	\$66,765

Source: World Population Review.

Poverty

Poverty Rate - Franklin County and State

	Poverty Rate
Franklin	21.7%
Florida	13.1%

Source: World Population Review.

Poverty Rate by Race/Ethnicity - Franklin County and State

Race/Ethnicity	Franklin	Florida
Hispanic	28.8%	15.9%
Other	89.8%	18.8%
Black	33.6%	20.5%
Multiple	12.8%	13.6%
White	19.7%	9.6%
Asian	-	11.3%
Native	-	18.2%
Pacific Islander	-	16.6%
Overall Poverty Rate	21.7%	13.1%

Source: World Population Review.

Percent in Poverty by Education Level - Franklin County and State

Education Level	Franklin	Florida
Less Than 9 th Grade	22.4%	24.2%
High School Graduate	25.3%	14.2%
Some college	13.1%	9.6%
Bachelor's Degree or Greater	3.0%	5.6%
Overall Poverty Rate	21.7%	13.1%

Source: World Population Review.

Percent in Poverty by Gender and Employment - Franklin County and State

Gender and Employment Status	Franklin	Florida
Male Employed	10.3%	5.2%
Male Unemployed	10.0%	25.9%
Female Employed	11.0%	6.8%
Female Unemployed	23.8%	30.5%

Source: World Population Review.

ALICE

Poverty and ALICE Households - Franklin County and State

	Total Households	Poverty Households	% Households in Poverty	ALICE Households	% ALICE Households	% Below ALICE Threshold**
Franklin	4,761	900	18.9%	1,409	29.6%	48.5%
Florida	8,800,279					46%

Source: United for ALICE, 2022.

*ALICE Households earned above the FPL but not enough to afford the basics in the communities where they live.

**% Below ALICE Threshold is Poverty Households + ALICE Households divided by total number of households.

Income - Franklin County and State

Income	Franklin	Florida
Median Household Income	\$58,107	\$67,917
Per Capita Income	\$31,422	\$38,850
Families	\$65,462 (Md) \$90,856 (Mn)	\$74,237 (Md) \$102,392 (Mn)
Households	\$58,107 (Md) \$77,080 (Mn)	\$61,777 (Md) \$88,267 (Mn)
Married Families	\$75,982 (Md)	\$88,158 (Md) \$118,266 (Mn)
Non-Families	\$34,031 (Md) \$49,691 (Mn)	\$39,047 (Md) \$58,002 (Mn)

Source: Census 2023 QuickFacts and World Population Review.

** Md” refers to “Median;” Mn” refers to “Mean.”

Labor Force Participation

Labor Force participation - Franklin County and State

Labor Force Participation	Franklin	Florida
Labor Force Participation	44.6%	59.4%
Employment Rate	40.6%	55.9%
Unemployment Rate	8.9%	5.3%

Source: World Population Review.

ELCNWF Target Population

Population by County by Age Groups - Franklin County and Total ELCNWF - 2022

	<1		1-4		5-9		9 or younger		ELC Total	
	#	%	#	%	#	%	#	%	#	%
Franklin	88	0.7%	383	3.1%	512	4.1%	983	7.9%	12,501	100%
Total	3,247	1.0%	13,156	4.2%	17,398	5.5%	33,801	10.8%	314,006	100%

Source: Florida Health Charts – Population Estimates Query System, 2022.

https://www.flhealthcharts.gov/FLQUERY_New/Population/Count.

Early Learning Programs by ELCNWF and Franklin County - FY 2022-23

	ELCNWF	Franklin
Children in School Readiness	3,758	34
Children Receiving high-quality early Childhood Education	295	34
Children in Voluntary Pre-K (4-year-olds)	1,773 (1,746 families)	55 (54 families)
ELC Contracted Providers	195 (123 offered School Readiness Program; 72 offered Voluntary PK)	6 (4 offer School readiness and 2 offer Voluntary PK)
Parents & Caregivers Assisted with Childcare Tuition	2,240	28
Impact to Local Economy	\$39M	\$561,000

Source: Early Learning Coalition Northwest Florida (ELCNWF).

School Readiness Enrollment by Age - Franklin County and ELCNWF – February 2024

Age	Franklin	Total
Infant	0	107
One Year Old	1	275
Two Years Old	6	371
Three Years Old	7	355
Four Years Old	3	290
Five Years Old	1	162
School Age	2	542
Special Needs	0	0
Total	20	2,102

Source: ELCNWF, February 29, 2024.

School Readiness Enrollment by Age - Franklin County and ELCNWF – March 2024

Age	Franklin	Total
Infant	0	120
One Year Old	3	280
Two Years Old	5	347
Three Years Old	9	379
Four Years Old	3	297
Five Years Old	2	182
School Age	2	504
Special Needs	0	0
Total	24	2,109

Source: ELCNWF, March 31, 2024.

VPK Enrollment – Franklin County and ELCNWF - February 2024

Program Type	Franklin	Total
School Based		
February 2024	58	1,002
March 2024	57	991
Non-School Based		
February 2024	0	571
March 2024		565
February 2024 Total	58	1,573
March 2024 Total	57	1,556

Source: ELCNWF, February 29, 2024, and March 31, 2024.

All Providers - Franklin County and ELCNWF – March 2024

	Center	Head Start	Family Child Care Home	School Age Program	Faith-based Exempt	Public School Charter School	Private School	Total
Franklin	1	1	0	0	0	2	0	4
Total	71	8	4	6	1	33	1	124

Source: ELCNWF, March 31, 2024.

School Readiness Providers - Franklin County and ELCNWF – March 2024

	Center	Head Start	Family Child Care Home	School Age Program	Faith-based Exempt	Public School Charter School	Private School	Total
Franklin	1	1	0	0	0	0	0	2
Total	67	8	4	5	1	0	0	86

Source: ELCNWF, March 31, 2024.

VPK Providers - Franklin County and ELCNWF – March 2024

	Center	Head Start	Family Child Care Home	School Age Program	Faith-based Exempt	Public School Charter School	Private School	Total
Franklin	0	0	0	0	0	2	0	2
Total	36	5	0	0	0	33	1	75

Source: ELCNWF, March 31, 2024.

Readiness for Kindergarten* - Franklin County

School #	School Name	Number of Test Takers	Number "Ready for Kindergarten"	Total County Percentage	Percentage "Ready for Kindergarten"
91	FRANKLIN COUNTY SCHOOL	58	20		34.5%
9009	APALACHICOLA BAY CHARTER SCHOOL	32	16		50.0%
	TOTAL	90	36	40.0%	Range=34.5%-50.0%
	TOTAL ELCNWF	3,384	1,562	46.2%	

Source: Florida Department of Education.

*Scoring 690+ on FAST Star Early Literacy Assessment, Fall 2023.

ELCNWF Gulf County Profile

Population

Gulf County and State Population 2020-2024

	2020	2021	2022	2023	2024	Growth Rate 2020-2024
Gulf	14,259	14,462	15,299	15,693	16,087	12.8%
Florida*	21,538,216	21,830,708	22,245,521	22,610,726	22,975,931	6.7%

Source: World Population Review.

*Source: US Census Bureau QuickFacts 2023.

Race and Ethnicity

Race and Ethnicity – Gulf County and State 2022

	Hispanic or Latino	Black or African American	White	Asian	American Indian/Alaskan Native	Pacific Islander	Two or More Races
Gulf	4.5%	14.2%	81.6%	0.7%	0.8%	0.7%	2.7%
Florida	27.1%	17.0%	76.8%	3.1%	0.5%	0.1%	2.4%

Source: US Census Bureau QuickFacts; Census Reporter Profile Data; ACS 2022.

Place of Birth and Citizenship

Place of Birth – Gulf County and State

Place of Birth	Gulf	Florida
Born in County	52.9%	35.9%
Native Born	96.6%	79.0%
Foreign Born	3.4%	21.0%
Non-Citizens	1.9%	8.8%
Naturalized	1.6%	12.2%

Source: World Population Review.

Languages Spoken at Home

Languages Spoken at Home – Gulf County and State

Languages	Gulf	Florida
Speak only English	94.0%	70.2%
Speak Other Languages	6.0%	29.8%
Speak Spanish	3.9%	22.1%

Source: 2024 World Population Review.

Median Age – Gulf County and State

	Median Age
Gulf	46.5
Florida	42.3

Sources: World Population Review.

Families and Households

Home Ownership – Gulf County and State

	All Households	Married	Non-Family	Housing Units	Average Family Size	Average Household Size
Gulf	5,648	2,858	1,931	9,363	2.67	2.19
Florida	8,157,420	3,815,705	2,882,929	10,257,426	3.16	2.57

Source: 2022 American Community Survey, Five Year Estimates.

Source: World Population Review.

Homeowners and Renters

Homeowners and Renters – Gulf County and State

	All Households	Married	Non-Family
Homeowners			
Gulf	78.6%	86.3%	75.8%
Florida	66.5%	79.3%	57.1%
Renters			
Gulf	21.4%	13.7%	24.2%
Florida	33.5%	20.7%	42.9%

Source: World Population Review.

Educational Attainment – Degree Attainment for Adults

Educational Attainment - Gulf County and State

Educational Attainment	Gulf	Florida
Less Than 9 th Grade	4.0%	4.4%
9 th to 12 th Grade	10.3%	6.6%
High School Graduate	34.1%	27.9%
Some college	21.0%	19.5%
Associate Degree	9.2%	10.1%
Bachelor's Degree	12.8%	19.8%
Graduate Degree	8.6%	11.7%

Source: World Population Review (2024); American Community Survey, Five Year Estimates. (2018-2022).

Educational Attainment by Race

Educational Attainment by Race/Ethnicity – Gulf County and State

Race/Ethnicity	Gulf		Florida	
	High School Percent	Bachelors Percent	High School Percent	Bachelors Percent
Hispanic	68.7%	8.9%	81.1%	26.7%
Other Race	93.5%	0%	76.8%	21.5%
White	90.4%	25.7%	93.5%	35.1%
Black	65.3%	5.5%	84.6%	20.9%
Asian	91.2%	78.9%	87.2%	50.9%
Two or More Races	90.6%	11.7%	85.5%	30.7%
Native American	58.4%	0%	77.5%	33.5%
Pacific Islander	-	-	85.3%	21.9%

Source: World Population Review.

Average Income by Level of Education

Education Level – Gulf County and State

Education Level	Gulf	Florida
Overall Average	\$38,134	\$38,669
Less Than 9 th Grade	\$23,859	\$24,999
High School Graduate	\$27,578	\$30,855
Some college	\$41,495	\$36,627
Bachelor's Degree	\$49,079	\$51,092
Graduate Degree	\$54,052	\$66,765

Source: World Population Review.

Poverty

Poverty Rate – Gulf County and State

	Poverty Rate
Gulf	12.3%
Florida	13.1%

Source: World Population Review.

Poverty Rate by Race/Ethnicity – Gulf County and State

Race/Ethnicity	Gulf	Florida
Hispanic	26.1%	15.9%
Other	68.8%	18.8%
Black	27.6%	20.5%
Multiple	7.4%	13.6%
White	11.0%	9.6%
Asian	-	11.3%
Native	-	18.2%
Pacific Islander	-	16.6%
Overall Poverty Rate	12.3%	13.1%

Source: World Population Review.

Percent in Poverty by Education Level – Gulf County and State

Education Level	Gulf	Florida
Less Than 9 th Grade	20.1%	24.2%
High School Graduate	13.8%	14.2%
Some college	10.2%	9.6%
Bachelor’s Degree or Greater	2.6%	5.6%
Overall Poverty Rate	12.3%	13.1%

Source: World Population Review.

Percent in Poverty by Gender and Employment – Gulf County and State

Gender and Employment Status	Gulf	Florida
Male Employed	13.2%	5.2%
Male Unemployed	46.9%	25.9%
Female Employed	13.2%	6.8%
Female Unemployed	64.5%	30.5%

Source: World Population Review.

ALICE

Poverty and ALICE Households – Gulf County and State

	Total Households	Poverty Households	% Households in Poverty	ALICE Households	% ALICE Households	% Below ALICE Threshold**
Gulf	5,648	789	14.0%	2,127	37.7%	51.6%
Florida	8,580,279					46.0%

Source: United for ALICE, 2022.

*ALICE Households earned above the FPL but not enough to afford the basics in the communities where they live.

**% Below ALICE Threshold is Poverty Households + ALICE Households divided by total number of households.

Income – Gulf County and State

Income	Gulf	Florida
Median Household Income	\$56,250	\$67,917
Per Capita Income	\$30,011	\$38,850
Families	\$70,654 (Md) \$92,966 (Mn)	\$74,237 (Md) \$102,392 (Mn)
Households	\$56,250 (Md) \$79,013 (Mn)	\$61,777 (Md) \$88,267 (Mn)
Married Families	\$82,882 (Md) -	\$88,158 (Md) \$118,266 (Mn)
Non-Families	\$42,595 (Md) \$50,449 (Mn)	\$39,047 (Md) \$58,002 (Mn)

Source: Census 2023 QuickFacts and World Population Review.

** "Md" refers to "Median;" "Mn" refers to "Mean."

Labor Force Participation

Labor Force Participation – Gulf County and State

Labor Force Participation	Gulf	Florida
Labor Force Participation	42.4%	59.4%
Employment Rate	40.5%	55.9%
Unemployment Rate	4.3%	5.3%

ELCNWF Target Population

Population by Age Groups – Gulf County and ELCNWF – 2022

	<1		1-4		5-9		9 or younger		Total	
	#	%	#	%	#	%	#	%	#	%
Gulf	99	0.7%	522	3.5%	806	5.4%	1,427	9.5%	15,025	100%
Total ELCNWF	3,247	1.0%	13,156	4.2%	17,398	5.5%	33,801	10.8%	314,006	100%

Source: Florida Health Charts – Population Estimates Query System, 2022.

https://www.flhealthcharts.gov/FLQUERY_New/Population/Count.

Early Learning Programs by ELCNWF and Gulf County – FY 2022-23

	ELCNWF	Gulf
Children in School Readiness	3,758	44
Children Receiving high-quality early Childhood Education	295	44
Children in Voluntary Pre-K (4-year-olds)	1,773 (1,746 families)	64 (63 families)
ELC Contracted Providers	195 (123 offered School Readiness Program; 72 offered Voluntary PK)	7 (3 offer Schol Readiness and 4 offer Voluntary PK)
Parents & Caregivers Assisted with Childcare Tuition	2,240	31
Impact to Local Economy	\$39M	\$613,000

Source: Early Learning Coalition Northwest Florida (ELCNWF).

School Readiness Enrollment by Age – Gulf County and ELCNWF – February 2024

Age	Gulf	Total
Infant	0	107
One Year Old	4	275
Two Years Old	6	371
Three Years Old	6	355
Four Years Old	3	290
Five Years Old	0	162
School Age	0	542
Special Needs	0	0
Total	19	2,102

Source: ELCNWF, February 29, 2024.

School Readiness Enrollment by Age – Gulf County and ELCNWF – March 2024

Age	Gulf	Total
Infant	0	120
One Year Old	4	280
Two Years Old	5	347
Three Years Old	6	379
Four Years Old	3	297
Five Years Old	1	182
School Age	0	504
Special Needs	0	0
Total	19	2,109

Source: ELCNWF, March 31, 2024.

VPK Enrollment - Gulf County and ELCNWF – February 2024

Program Type	Gulf	Total
School Based		
February 2024	28	1,002
March 2024	28	991
Non-School Based		
February 2024	47	571
March 2024	45	565
February 2024 Total	75	1,573
March 2024 Total	73	1,556

Source: ELCNWF, February 29, 2024, and March 31, 2024.

All Providers - Gulf County and ELCNWF – March 2024

	Center	Head Start	Family Child Care Home	School Age Program	Faith-based Exempt	Public School Charter School	Private School	Total
Gulf	1	2	0	0	0	2	0	5
Total ELCNWF	71	8	4	6	1	33	1	124

Source: ELCNWF, March 31, 2024.

School Readiness Providers - Gulf County and ELCNWF – March 2024

	Center	Head Start	Family Child Care Home	School Age Program	Faith-based Exempt	Public School Charter School	Private School	Total
Gulf	1	2	0	0	0	0	0	3
Total ELCNWF	67	8	4	5	1	0	0	86

Source: ELCNWF, March 31, 2024.

VPK Providers – Gulf County and ELCNWF – March 2024

	Center	Head Start	Family Child Care Home	School Age Program	Faith-based Exempt	Public School Charter School	Private School	Total
Gulf	1	2	0	0	0	2	0	5
Total ELCNWF	36	5	0	0	0	33	1	75

Source: ELCNWF, March 31, 2024.

Readiness for Kindergarten* - Gulf County

School #	School Name	Number of Test Takers	Number "Ready for Kindergarten"	Total County Percentage "Ready for Kindergarten"	Percentage "Ready for Kindergarten"
22	WEWAHITCHKA ELEMENTARY SCHOOL	65	28		43.1%
51	PORT ST. JOE ELEMENTARY SCHOOL	46	16		34.8%
	TOTAL	111	44	39.6%	Range=34.8%-43.1%
	TOTAL ELCNWF	3,384	1,562	46.2%	

Source: Florida Department of Education.

*Scoring 690+ on FAST Star Early Literacy Assessment, Fall 2023.

ELCNWF Holmes County Profile

Population

Holmes County and State Population 2020-2024

County	2020	2021	2022	2023	2024	Growth Rate 2020-2024
Holmes	19,578	19,309	19,653	19,944	20,235	3.4%
Florida*	21,538,216	21,830,708	22,245,521	22,610,726	22,975,931	6.7%

Source: World Population Review.

*Source: US Census Bureau QuickFacts 2023.

Race and Ethnicity

Race and Ethnicity – Holmes County and State - 2022

	Hispanic or Latino	Black or African American	White	Asian	American Indian/Alaskan Native	Pacific Islander	Two or More Races
Holmes	3.4%	6.9%	88.3%	0.8%	1.2%	0.2%	2.7%
Florida	27.1%	17.0%	76.8%	3.1%	0.5%	0.1%	2.4%

Source: US Census Bureau QuickFacts; Census Reporter Profile Data; ACS 2022.

Place of Birth and Citizenship

Place of Birth - Holmes County and State

Place of Birth	Holmes	Florida
Born in County	57.1%	35.9%
Native Born	98.3%	79.0%
Foreign Born	1.7%	21.0%
Non-Citizens	0.7%	8.8%
Naturalized	1.0%	12.2%

Source: World Population Review.

Languages Spoken at Home

Languages Spoken at Home – Holmes County and State

Languages	Holmes	Florida
Speak only English	95.3%	70.2%
Speak Other Languages	4.7%	29.8%
Speak Spanish	3.6%	22.1%

Source: 2024 World Population Review.

Median Age

Median Age – Holmes County and State

	Median Age
Holmes	41.0
Florida	42.3

Sources: World Population Review.

Families and Households

Home Ownership – Holmes County and State

County	All Households	Married	Non-Family	Housing Units	Average Family Size	Average Household Size
Holmes	7,069	3,224	2,433	8,661	3.14	2.52
Florida	8,157,420	3,815,705	2,882,929	10,257,426	3.16	2.57

Source: 2022 American Community Survey, Five Year Estimates.

Source: World Population Review.

Homeowners and Renters

Homeowners and Renter – Holmes County and State

County	All Households	Married	Non-Family
Homeowners			
Holmes	76.5%	84.1%	75.6%
Florida	66.5%	79.3%	57.1%
Renters			
Holmes	23.5%	15.9%	24.4%
Florida	33.5%	20.7%	42.9%

Source: World Population Review.

Educational Attainment – Degree Attainment for Adults

Educational Attainment - Holmes County and State

Educational Attainment	Holmes	Florida
Less Than 9 th Grade	4.5%	4.4%
9 th to 12 th Grade	12.8%	6.6%
High School Graduate	45.7%	27.9%
Some college	20.8%	19.5%
Associate Degree	5.2%	10.1%
Bachelor's Degree	7.7%	19.8%
Graduate Degree	3.3%	11.7%

Source: World Population Review (2024); American Community Survey, Five Year Estimates. (2018-2022).

Educational Attainment by Race

Educational Attainment by Race/Ethnicity – Holmes County and State

Race/Ethnicity	Holmes		Florida	
	High School Percent	Bachelors Percent	High School Percent	Bachelors Percent
Hispanic	86.2%	2.6%	81.1%	26.7%
Other Race	88.3%	0.9%	76.8%	21.5%
White	83.9%	11.5%	93.5%	35.1%
Black	76.8%	2.9%	84.6%	20.9%
Asian	39.3%	27.9%	87.2%	50.9%
Two or More Races	65.2%	13.7%	85.5%	30.7%
Native American	75.4%	50.0%	77.5%	33.5%
Pacific Islander	100.0%	0%	85.3%	21.9%

Source: World Population Review. ^(O&U)

Average Income by Level of Education

Education Level – Holmes County and State

Education Level	Holmes	Florida
Overall Average	\$34,273	\$38,669
Less Than 9 th Grade	\$35,073	\$24,999
High School Graduate	\$29,504	\$30,855
Some college	\$30,504	\$36,627
Bachelor's Degree	\$47,210	\$51,092
Graduate Degree	\$54,750	\$66,765

Source: World Population Review.

Poverty

Poverty Rate – Holmes County and State

	Poverty Rate
Holmes	16.6%
Florida	13.1%

Source: World Population Review.

Poverty Rate by Race/Ethnicity – Holmes County and State

Race/Ethnicity	Holmes	Florida
Hispanic	5.2%	15.9%
Other	14.2%	18.8%
Black	54.5%	20.5%
Multiple	16.45	13.6%
White	15.7%	9.6%
Asian	-	11.3%
Native	0.8%	18.2%
Pacific Islander	16.7%	16.6%
Overall Poverty Rate	16.6%	13.1%

Source: World Population Review.

Percent in Poverty by Education Level – Homes County and State

Education Level	Holmes	Florida
Less Than 9 th Grade	22.7%	24.2%
High School Graduate	14.5%	14.2%
Some college	13.3%	9.6%
Bachelor's Degree or Greater	6.0%	5.6%
Overall Poverty Rate	16.6%	13.1%

Source: World Population Review.

Percent in Poverty by Gender and Employment – Holmes County and State

Gender and Employment Status	Holmes	Florida
Male Employed	5.0%	5.2%
Male Unemployed	34.4%	25.9%
Female Employed	8.5%	6.8%
Female Unemployed	41.6%	30.5%

Source: World Population Review.

ALICE (Asset Limited, Income Constrained, Employed)

Poverty and ALICE Households – Holmes County and State

	Total Households	Poverty Households	% Households in Poverty	ALICE Households	% ALICE Households	% Below ALICE Threshold**
Holmes	7,069	1,265	17.9%	3,199	45.3%	63.1%
Florida	8,800,279					46.0%

Source: United for ALICE, 2022.

*ALICE Households earned above the FPL (Federal Poverty Level) but not enough to afford the basics in the communities where they live.

**% Below ALICE Threshold is Poverty Households + ALICE Households divided by total number of households.

Income – Holmes County and State

Income	Holmes	Florida
Median Household Income	\$46,063	\$67,917
Per Capita Income	\$22,860	\$38,850
Families	\$55,802 (Md) \$70,695 (Mn)	\$74,237 (Md) \$102,392 (Mn)
Households	\$46,063 (Md) \$58,649 (Mn)	\$61,777 (Md) \$88,267 (Mn)
Married Families	\$60,789 (Md) -	\$88,158 (Md) \$118,266 (Mn)
Non-Families	\$27,513 (Md) \$33,295 (Mn)	\$39,047 (Md) \$58,002 (Mn)

Source: Census 2023 QuickFacts and World Population Review.

*"Md" refers to "Median;" "Mn" refers to "Mean."

Labor Force Participation

Labor Force Participation – Holmes County and State

Labor Force Participation	Holmes	Florida
Labor Force Participation	49.3%	59.4%
Employment Rate	46.7%	55.9%
Unemployment Rate	4.7%	5.3%

Source: World Population Review.

ELCNWF Target Population

Population - Holmes County and ELCNWF

Total by Age Groups 2022

	<1		1-4		5-9		9 or younger		Total	
	#	%	#	%	#	%	#	%	#	%
Holmes	185	0.9%	829	4.2%	1,103	5.6%	2,117	10.7%	19,724	100%
Total ELCNWF	3,247	1.0%	13,156	4.2%	17,398	5.5%	33,801	10.8%	314,006	100%

Source: Florida Health Charts – Population Estimates Query System, 2022.

https://www.flhealthcharts.gov/FLQUERY_New/Population/Count.

Early Learning Programs by ELCNWF and Holmes County – FY 2022-23

	ELCNWF	Holmes
Children in School Readiness	3,758	223
Children Receiving high-quality early Childhood Education	295	223
Children in Voluntary Pre-K (4-year-olds)	1,773 (1,746 families)	145 (143 families)
ELC (Early Learning Coalition) Contracted Providers	195 (123 offered School Readiness Program; 72 offered Voluntary PK)	12 (5 offer School readiness and 7 offer Voluntary PK)
Parents & Caregivers Assisted with Childcare Tuition	2,240	117
Impact to Local Economy	\$39M	\$2.3 M

Source: Early Learning Coalition Northwest Florida (ELCNWF).

School Readiness Enrollment by Age - Holmes County and ELCNWF– February 2024

Age	Holmes	Total
Infant	6	107
One Year Old	13	275
Two Years Old	19	371
Three Years Old	22	355
Four Years Old	14	290
Five Years Old	13	162
School Age	55	542
Special Needs	0	0
Total	142	2,102

Source: ELCNWF, February 29, 2024.

School Readiness Enrollment by Age - Holmes County and ELCNWF – March 2024

Age	Holmes	Total
Infant	5	120
One Year Old	14	280
Two Years Old	20	347
Three Years Old	23	379
Four Years Old	15	297
Five Years Old	13	182
School Age	52	504
Special Needs	0	0
Total	142	2,109

Source: ELCNWF, March 31, 2024.

VPK Enrollment - Holmes County and ELCNWF– February 2024

Program Type	Holmes	Total
School Based		
February 2024	85	1,002
March 2024	82	991
Non-School Based		
February 2024	30	571
March 2024	29	565
February 2024 Total	115	1,573
March 2024 Total	111	1,556

Source: ELCNWF, February 29, 2024, and March 31, 2024.

All Providers - Holmes County and ELCNWF – March 2024

	Center	Head Start	Family Child Care Home	School Age Program	Faith-based Exempt	Public School Charter School	Private School	Total
Holmes	5	C	0	0	0	4	0	9
Total ELCNWF	71	8	4	6	1	33	1	124

Source: ELCNWF, March 31, 2024.

School Readiness Providers - Holmes County and ELCNWF – March 2024

County	Center	Head Start	Family Child Care Home	School Age Program	Faith-based Exempt	Public School Charter School	Private School	Total
Holmes	5	0	0	0	0	0	0	5
Total ELCNWF	67	8	4	5	1	0	0	86

Source: ELCNWF, March 31, 2024.

VPK Providers - Holmes County and ELCNWF – March 2024

	Center	Head Start	Family Child Care Home	School Age Program	Faith-based Exempt	Public School Charter School	Private School	Total
Holmes	3	0	0	0	0	4	0	7
Total ELCNWF	36	5	0	0	0	33	1	75

Source: ELCNWF, March 31, 2024.

Readiness for Kindergarten* - Holmes County

School #	School Name	Number of Test Takers	Number "Ready for Kindergarten"	Total County Percentage "Ready for Kindergarten"	Percentage "Ready for Kindergarten"
262	BONIFAY K-8 SCHOOL	121	52		43.0%
41	BETHLEHEM HIGH SCHOOL	29	17		58.6%
111	PONCE DE LEON ELEM. SCHOOL	39	9		23.1%
31	POPLAR SPRINGS HIGH SCHOOL	31	11		35.5%
	TOTAL	220	89	40.5%	Range = 23.2%-58.6%
	TOTAL ELCNWF	3,384	1,562	46.2%	

*Scoring 690+ on FAST Star Early Literacy Assessment, Fall 2023

Source: Florida Department of Education.

ELCNWF Jackson County Profile

Population

Jackson County and State Population 2020-2024

	2020	2021	2022	2023	2024	Growth Rate 2020-2024
Jackson	47,096	47,119	48,255	48,622	48,989	4.0%
Total	304,934	310,956	319,703	319,703	333,609	9.4%
Florida*	21,538,216	21,830,708	22,245,521	22,610,726	22,975,931	6.7%

Source: World Population Review.

*Source: US Census Bureau QuickFacts 2023.

Race and Ethnicity

Race and Ethnicity - Jackson County and State - 2022

	Hispanic or Latino	Black or African American	White	Asian	American Indian/Alaskan Native	Pacific Islander	Two or More Races
Jackson	5.6%	25.8%	70.0%	0.7%	0.9%	0.2%	2.3%
Florida	27.1%	17.0%	76.8%	3.1%	0.5%	0.1%	2.4%

Source: US Census Bureau QuickFacts; Census Reporter Profile Data; ACS 2022.

Place of Birth and Citizenship

Place of Birth - Jackson County and State

Place of Birth	Jackson	Florida
Born in County	61.6%	35.9%
Native Born	97.7%	79.0%
Foreign Born	2.3%	21.0%
Non-Citizens	1.2%	8.8%
Naturalized	1.2%	12.2%

Source: World Population Review.

Languages Spoken at Home

Languages Spoken at Home - Jackson County and State

Languages	Jackson	Florida
Speak only English	94.2%	70.2%
Speak Other Languages	5.8%	29.8%
Speak Spanish	4.0%	22.1%

Source: 2024 World Population Review.

Median Age

Median Age - Jackson County and State

	Median Age
Jackson	42.9
Florida	42.3

Sources: World Population Review.

Families and Households

Home Ownership - Jackson County and State

	All Households	Married	Non-Family	Housing Units	Average Family Size	Average Household Size
Jackson	16,880	7,578	6,043	20,150	2.40	3.03
Florida	8,157,420	3,815,705	2,882,929	10,257,426	3.16	2.57

Source: 2022 American Community Survey Five Year Estimates.

Source: World Population Review.

Homeowners and Renters

Homeowners and Renters - Jackson County and State

	All Households	Married	Non-Family
Homeowners			
Jackson	74.0%	84.1%	67.9%
Florida	66.5%	79.3%	57.1%
Renters			
Jackson	26.0%	15.9%	32.1%
Florida	33.5%	20.7%	42.9%

Source: World Population Review.

Educational Attainment – Degree Attainment for Adults

Educational Attainment - Jackson County and State

Educational Attainment	Jackson	Florida
Less Than 9 th Grade	4.7%	4.4%
9 th to 12 th Grade	11.1%	6.6%
High School Graduate	39.7%	27.9%
Some college	21.8%	19.5%
Associate Degree	8.9%	10.1%
Bachelor's Degree	8.3%	19.8%
Graduate Degree	5.5%	11.7%

Source: World Population Review (2024); American Community Survey, Five Year Estimates. (2018-2022).

Educational Attainment by Race/Ethnicity

Educational Attainment by Race/Ethnicity - Jackson County and State

Race/Ethnicity	Jackson		Florida	
	High School Percent	Bachelors Percent	High School Percent	Bachelors Percent
Hispanic	63.8%	11.8%	81.1%	26.7%
Other Race	68.9%	8.6%	76.8%	21.5%
White	88.8%	16.7%	93.5%	35.1%
Black	76.1%	7.9%	84.6%	20.9%
Asian	38.6%	10.1%	87.2%	50.9%
Two or More Races	77.4%	10.3%	85.5%	30.7%
Native American	89.7%	6.2%	77.5%	33.5%
Pacific Islander	100.0%	2.2%	85.3%	21.9%

Source: World Population Review.

Average Income by Level of Education

Average Income by Education Level - Jackson County and State

Education Level	Jackson	Florida
Overall Average	\$35,590	\$38,669
Less Than 9 th Grade	\$30,851	\$24,999
High School Graduate	\$31,545	\$30,855
Some college	\$34,025	\$36,627
Bachelor's Degree	\$52,747	\$51,092
Graduate Degree	\$58,056	\$66,765

Source: World Population Review.

Poverty

Poverty Rate - Jackson County and State

	Poverty Rate
Jackson	19.2%
Florida	13.1%

Source: World Population Review.

Poverty Rate by Race/Ethnicity - Jackson County and State

Race/Ethnicity	Jackson	Florida
Hispanic	26.9%	15.9%
Other	29.3%	18.8%
Black	25.6%	20.5%
Multiple	17.2%	13.6%
White	16.9%	9.6%
Asian	-	11.3%
Native	13.1%	18.2%
Pacific Islander	-	16.6%
Overall Poverty Rate	19.2%	13.1%

Source: World Population Review.

Percent in Poverty by Education Level - Jackson County and State

Education Level	Jackson	Florida
Less Than 9 th Grade	29.9%	24.2%
High School Graduate	18.6%	14.2%
Some college	13.5%	9.6%
Bachelor’s Degree or Greater	3.9%	5.6%
Overall Poverty Rate	19.2%	13.1%

Source: World Population Review.

Percent in Poverty by Gender and Employment - Jackson County and State

Gender and Employment Status	Jackson	Florida
Male Employed	5.7%	5.2%
Male Unemployed	29.4%	25.9%
Female Employed	8.1%	6.8%
Female Unemployed	47.8%	30.5%

Source: World Population Review.

ALICE

Poverty and ALICE Households - Jackson County and State

	Total Households	Poverty Households	% Households in Poverty	ALICE Households	% ALICE Households	% Below ALICE Threshold**
Jackson	16,880	3,130	18.5%	6,811	40.3%	58.9%
Florida	8,800,279					46.0%

Source: United for ALICE, 2022.

*ALICE Households earned above the FPL but not enough to afford the basics in the communities where they live.

**% Below ALICE Threshold is Poverty Households + ALICE Households divided by total number of households.

Income - Jackson County and State

Income	Jackson	Florida
Median Household Income	\$46,144	\$67,917
Per Capita Income	\$23,210	\$38,850
Families	\$58,273 (Md) \$76,149 (Mn)	\$74,237 (Md) \$102,392 (Mn)
Households	\$46,144 (Md) \$62,374 (Mn)	\$61,777 (Md) \$88,267 (Mn)
Married Families	\$71,841 (Md) -	\$88,158 (Md) \$118,266 (Mn)
Non-Families	\$26,274 (Md) \$35,335 (Mn)	\$39,047 (Md) \$58,002 (Mn)

Source: Census 2023 QuickFacts and World Population Review.

*"Md" refers to "Median;" "Mn" refers to "Mean."

Labor Force Participation

Labor Force Participation - Jackson County and State

Labor Force Participation	Jackson	Florida
Labor Force Participation	42.5%	59.4%
Employment Rate	40.3%	55.9%
Unemployment Rate	4.7%	5.3%

Source: World Population Review.

ELCNWF Target Population

Population by Age Groups - Jackson County and State 2022

	<1		1-4		5-9		9 or younger		Total	
	#	%	#	%	#	%	#	%	#	%
Jackson	506	1.1%	1,938	4.1%	2,441	5.2%	4,885	10.3%	47,322	100%
Total ELCNWF	3,247	1.0%	13,156	4.2%	17,398	5.5%	33,801	10.8%	314,006	100%

Source: Florida Health Charts – Population Estimates Query System, 2022.

https://www.flhealthcharts.gov/FLQUERY_New/Population/Count.

Early Learning Programs – ELCNWF and Jackson County - FY 2022-23

	ELCNWF	Jackson
Children in School Readiness	3,758	917
Children Receiving high-quality early Childhood Education	295	917
Children in Voluntary Pre-K (4-year-olds)	1,773 (1,746 families)	306 (296 families)
ELC Contracted Providers	195 (123 offered School Readiness Program; 72 offered Voluntary PK)	34 (20 offer School Readiness and 14 offer Voluntary PK)
Parents & Caregivers Assisted with Childcare Tuition	2,240	509
Impact to Local Economy	\$39M	\$6.9M

Source: Early Learning Coalition Northwest Florida (ELCNWF).

School Readiness Enrollment by Age - Jackson County and ELCNWF – February 2024

Age	Jackson	Total
Infant	24	107
One Year Old	67	275
Two Years Old	77	371
Three Years Old	82	355
Four Years Old	63	290
Five Years Old	33	162
School Age	157	542
Special Needs	0	0
Total	503	2,102

Source: ELCNWF, February 29, 2024.

School Readiness Enrollment by Age - Jackson County and ELCNWF – March 2024

Age	Jackson	Total
Infant	32	120
One Year Old	68	280
Two Years Old	76	347
Three Years Old	85	379
Four Years Old	63	297
Five Years Old	38	182
School Age	144	504
Special Needs	0	0
Total	506	2,109

Source: ELCNWF, March 31, 2024.

VPK Enrollment =- Jackson County and ELCNWF Total – February 2024

Program Type	Jackson	Total
School Based		
February 2024	168	1,002
March 2024	167	991
Non-School Based		
February 2024	97	571
March 2024	98	565
February 2024 Total	265	1,573
March 2024 Total	265	1,556

Source: ELCNWF, February 29, 2024, and March 31, 2024.

All Providers - Jackson County and ELCNWF – March 2024

	Center	Head Start	Family Child Care Home	School Age Program	Faith-based Exempt	Public School Charter School	Private School	Total
Jackson	14	0	0	1	0	5	0	20
Total	71	8	4	6	1	33	1	124

Source: ELCNWF, March 31, 2024.

School Readiness Providers - Jackson County and ELCNWF – March 2024

	Center	Head Start	Family Child Care Home	School Age Program	Faith-based Exempt	Public School Charter School	Private School	Total
Jackson	14	0	0	0	0	0	0	15
Total	67	8	4	5	1	0	0	86

Source: ELCNWF, March 31, 2024.

VPK Providers - Jackson County and ELCNWF – March 2024

	Center	Head Start	Family Child Care Home	School Age Program	Faith-based Exempt	Public School Charter School	Private School	Total
Jackson	9	0	0	0	0	5	0	14
Total	36	5	0	0	0	33	1	75

Source: ELCNWF, March 31, 2024.

Readiness for Kindergarten* - Jackson County

School #	School Name	Number of Test Takers	Number "Ready for Kindergarten"	Total County Percentage "Ready for Kindergarten"	Percentage "Ready for Kindergarten"
171	SNEADS ELEMENTARY SCHOOL	118	50		42.4%
491	GRACEVILLE SCHOOL	40	15		37.5%
121	MALONE SCHOOL	46	20		43.5%
202	HOPE SCHOOL	*	*		*
51	MARIANNA K-8 SCHOOL	243	101		41.6%
271	COTTONDALE ELEMENTARY SCHOOL	72	29		40.3%
212	JACKSON ALTERNATIVE SCHOOL	*	*		*
	TOTAL	519	215	41.4%	Range = 37.5%-43.5%
	TOTAL ELCNWF	3,384	1,562	46.2%	

Source: Florida Department of Education.

*Scoring 690+ on FAST Star Early Literacy Assessment, Fall 2023.

ELCNWF Washington County Profile

Population

Washington County and State Population 2020-2024

	2020	2021	2022	2023	2024	Growth Rate 2020-2024
Washington	23,320	24,867	25,405	25,602	25,799	10.6%
Florida*	21,538,216	21,830,708	22,245,521	22,610,726	22,975,931	6.7%

Source: World Population Review.

*Source: US Census Bureau QuickFacts 2023.

Race and Ethnicity

Race and Ethnicity - Washington County and State - 2022

Race/Ethnicity	Hispanic or Latino	Black or African American	White	Asian	American Indian/Alaskan Native	Pacific Islander	Two or More Races
Washington	4.7%	13.3%	80.6%	0.8%	1.4%	0.4%	3.4%
Florida	27.1%	17.0%	76.8%	3.1%	0.5%	0.1%	2.4%

Source: US Census Bureau QuickFacts; Census Reporter Profile Data; ACS 2022.

Place of Birth and Citizenship

Place of Birth - Washington County and State

Place of Birth	Washington	Florida
Born in County	60.3%	35.9%
Native Born	96.7%	79.0%
Foreign Born	3.4%	21.0%
Non-Citizens	2.4%	8.8%
Naturalized	0.9%	12.2%

Source: World Population Review.

Languages Spoken at Home

Languages Spoken at Home - Washington County and State

Languages	Washington	Florida
Speak only English	93.8%	70.2%
Speak Other Languages	6.2%	29.8%
Speak Spanish	3.8%	22.1%

Source: 2024 World Population Review.

Median Age

Median Age - Washington County and State

	Median Age
Washington	42.9
Florida	42.3

Sources: World Population Review.

Families and Households

Home Ownership - Washington County and State

	All Households	Married	Non-Family	Housing Units	Average Family Size	Average Household Size
Washington	9,095	4,398	2,853	11,031	2.89	2.45
Florida	8,157,420	3,815,705	2,882,929	10,257,426	3.16	2.57

Source: 2022 American Community Survey Five Year Estimates.

Source: World Population Review.

Homeowners and Renters

Homeowners and Renters - Washington County and State

	All Households	Married	Non-Family
Homeowners			
Washington	78.5%	85.9%	74.2%
Florida	66.5%	79.3%	57.1%
Renters			
Washington	21.6%	14.1%	25.8%
Florida	33.5%	20.7%	42.9%

Source: World Population Review.

Educational Attainment – Degree Attainment for Adults

Educational Attainment - Washington County and State

Educational Attainment	Washington	Florida
Less Than 9 th Grade	4.8%	4.4%
9 th to 12 th Grade	12.1%	6.6%
High School Graduate	42.6%	27.9%
Some college	21.9%	19.5%
Associate Degree	6.1%	10.1%
Bachelor's Degree	7.1%	19.8%
Graduate Degree	5.3%	11.7%

Source: World Population Review (2024); American Community Survey, Five Year Estimate. (2018-2022).

Educational Attainment by Race/Ethnicity

Educational Attainment by Race/Ethnicity - Washington County and State

Race/Ethnicity	Washington		Florida	
	High School Percent	Bachelors Percent	High School Percent	Bachelors Percent
Hispanic	64.5%	12.1%	81.1%	26.7%
Other Race	34.3%	8.3%	76.8%	21.5%
White	86.3%	14.1%	93.5%	35.1%
Black	69.7%	3.4%	84.6%	20.9%
Asian	75.2%	6.3%	87.2%	50.9%
Two or More Races	92.2%	13.6%	85.5%	30.7%
Native American	84.3%	13.9%	77.5%	33.5%
Pacific Islander	-	-	85.3%	21.9%

Source: World Population Review.

Average Income by Level of Education

Average Income by Education Level - Washington County and State

Education Level	Washington	Florida
Overall Average	\$35,009	\$38,669
Less Than 9 th Grade	\$24,908	\$24,999
High School Graduate	\$30,015	\$30,855
Some college	\$35,008	\$36,627
Bachelor's Degree	\$52,763	\$51,092
Graduate Degree	\$68,897	\$66,765

Source: World Population Review.

Poverty

Poverty Rate - Washington County and State

	Poverty Rate
Washington	22.7%
Florida	13.1%

Source: World Population Review.

Poverty Rate by Race/Ethnicity - Washington County and State

Race/Ethnicity	Washington	Florida
Hispanic	9.5%	15.9%
Other	-	18.8%
Black	25.8%	20.5%
Multiple	6.9%	13.6%
White	23.2%	9.6%
Asian	43.0%	11.3%
Native	30.9%	18.2%
Pacific Islander	-	16.6%
Overall Poverty Rate	22.7%	13.1%

Source: World Population Review.

Percent in Poverty by Education Level - Washington County and State

Education Level	Washington	Florida
Less Than 9 th Grade	37.0%	24.2%
High School Graduate	22.9%	14.2%
Some college	13.4%	9.6%
Bachelor's Degree or Greater	6.3%	5.6%
Overall Poverty Rate	22.7%	13.1%

Source: World Population Review.

Percent in Poverty by Gender and Employment - Washington County and State

Gender and Employment Status	Washington	Florida
Male Employed	6.0%	5.2%
Male Unemployed	58.0%	25.9%
Female Employed	13.8%	6.8%
Female Unemployed	43.9%	30.5%

Source: World Population Review.

ALICE

Poverty and ALICE Households - Washington County and State

	Total Households	Poverty Households	% Households in Poverty	ALICE Households	% ALICE Households	% Below ALICE Threshold**
Washington	9,095	1,820	20.0%	3,418	37.6%	57.6%
Florida	8,800,279					46.0%

Source: United for ALICE, 2022.

*ALICE Households earned above the FPL but not enough to afford the basics in the communities where they live.

**% Below ALICE Threshold is Poverty Households + ALICE households divided by total number of households.

Income - Washington County and State

Income	Washington	Florida
Median Household Income	\$47,536	\$67,917
Per Capita Income	\$23,984	\$38,850
Families	\$60,172 (Md) \$74,095 (Mn)	\$74,237 (Md) \$102,392 (Mn)
Households	\$47,536 (Md) \$63,246 (Mn)	\$61,777 (Md) \$88,267 (Mn)
Married Families	\$72,415 (Md) -	\$88,158 (Md) \$118,266 (Mn)
Non-Families	\$28,391 (Md) \$34,926 (Mn)	\$39,047 (Md) \$58,002 (Mn)

Source: Census 2023 QuickFacts and World Population Review.

** Md" refers to "Median;" "Mn" refers to "Mean."

Labor Force Participation

Labor Force Participation - Washington County and State

Labor Force Participation	Washington	Florida
Labor Force Participation	44.4%	59.4%
Employment Rate	42.3%	55.9%
Unemployment Rate	4.8%	5.3%

Source: World Population Review.

ELCNWF Target Population

Population by Age Groups - Washington County and State - 2022

	<1		1-4		5-9		9 or younger		Total	
	#	%	#	%	#	%	#	%	#	%
Washington	265	1.1%	1,008	4.0%	1,364	5.5%	2,637	10.6%	24,970	100%
Total ELCNWF	3,247	1.0%	13,156	4.2%	17,398	5.5%	33,801	10.8%	314,006	100%

Source: Florida Health Charts – Population Estimates Query System, 2022.

https://www.flhealthcharts.gov/FLQUERY_New/Population/Count.

Early Learning Programs by ELCNWF and Washington County - FY 2022-23

	ELCNWF	Washington
Children in School Readiness	3,758	295
Children Receiving high-quality early Childhood Education	295	-
Children in Voluntary Pre-K (4-year-olds)	1,773 (1,746 families)	160
ELC Contracted Providers	195 (123 offered School Readiness Program; 72 offered Voluntary PK)	10 (7 offer School Readiness; 3 offer Voluntary PK)
Parents & Caregivers Assisted with Childcare Tuition	2,240	108
Impact to Local Economy	\$39M	\$3.4M

Source: Early Learning Coalition Northwest Florida (ELCNWF).

School Readiness Enrollment by Age - Washington County and ELCNWF – February 2024

Age	Washington	Total
Infant	15	107
One Year Old	24	275
Two Years Old	31	371
Three Years Old	29	355
Four Years Old	26	290
Five Years Old	13	162
School Age	59	542
Special Needs	0	0
Total	197	2,102

Source: ELCNWF, February 29, 2024.

School Readiness Enrollment by Age - Washington County and ELCNWF – March 2024

Age	Washington	ELCNWF Total
Infant	16	120
One Year Old	19	280
Two Years Old	30	347
Three Years Old	31	379
Four Years Old	22	297
Five Years Old	14	182
School Age	54	504
Special Needs	0	0
Total	186	2,109

Source: ELCNWF, March 31, 2024.

VPK Enrollment- Washington County and ELCNWF – February 2024

Program Type	Washington	Total
School Based		
February 2024	132	1,002
March 2024	131	991
Non-School Based		
February 2024	13	571
March 2024	13	565
February 2024 Total	145	1,573
March 2024 Total	144	1,556

Source: ELCNWF, February 29, 2024, and March 31, 2024.

All Providers - Washington County and ELCNWF – March 2024

	Center	Head Start	Family Child Care Home	School Age Program	Faith-based Exempt	Public School Charter School	Private School	Total
Washington	5	0	0	0	0	2	0	7
Total	71	8	4	6	1	33	1	124

Source: ELCNWF, March 31, 2024.

School Readiness Providers - Washington County and ELCNWF – March 2024

	Center	Head Start	Family Child Care Home	School Age Program	Faith-based Exempt	Public School Charter School	Private School	Total
Washington	4	0	0	1	0	0	0	4
Total	67	8	4	5	1	0	0	86

Source: ELCNWF, March 31, 2024.

VPK Providers - Washington County and ELCNWF – March 2024

	Center	Head Start	Family Child Care Home	School Age Program	Faith-based Exempt	Public School Charter School	Private School	Total
Washington	1	0	0	0	0	2	0	3
Total	36	5	0	0	0	33	1	75

Source: ELCNWF, March 31, 2024.

Readiness for Kindergarten* - Washington County

School #	School Name	Number of Test Takers	Number "Ready for Kindergarten"	Total County Percentage "Ready for Kindergarten"	Percentage "Ready for Kindergarten"
123	WASHINGTON ACAD OF VARYING EXCEPTIONALITIES	*	*		*
151	VERNON ELEMENTARY SCHOOL	96	52		54.2%
41	KATE M. SMITH ELEMENTARY SCHOOL	154	74		48.1%
	TOTAL	250	126	50.4%	Range = 48.1%-54.2%
	TOTAL ELCNWF	3,384	1,562	46.2%	

Source: Florida Department of Education.

*Scoring 690+ on FAST Star Early Literacy Assessment, Fall 2023.