

2010 District of Columbia Child Care Market Rates and Capacity Utilization

*A Study of Licensed Family Home and Child Care Center
Providers in the District of Columbia*



FINAL REPORT

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Center for Applied Research and Urban Policy

The Center for Applied Research and Urban Policy (CARUP) was established in 1984. The Center conducts research on problems that affect the social, economic, physical, and biological health of urban areas, with a special focus on the District of Columbia. It provides technical assistance to urban managers and policy-makers. Special emphasis is placed on interdisciplinary approaches to problem solving.

CARUP recognizes that strong linkages between the university community, policy groups, and the local government are critical for developing research priorities and strategies that must take into consideration the needs identified by all those who have a stake in the District of Columbia and its residents. In order to effectively achieve a strong working relationship, the Center works to develop systematic linkages between appropriate government agencies and the university so that each is familiar with the other in terms of needs, capabilities, and resources.

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DEFINITION OF TERMS

Child development facility – facility where a child development program is provided for infants and children, away from home, for less than twenty-four (24) hours a day. It includes child development homes and child development centers, but does not include public or private elementary schools engaged in legally required education and related functions.

Child care center provider – operator of a licensed child development center providing child care services in the District of Columbia.

Child/Elderly development center - a building or part of a building, other than a child development home or elderly day care home, used for the non-residential licensed care, education, counseling, or training of individuals under the age of fifteen (15) years of age and/or for the non-residential care of individuals age 65 or older, totaling seven (7) or more persons, who are not related by blood or marriage to the caregiver and who are present for less than twenty-four (24) hours per day. This definition encompasses facilities generally known as child care centers, pre-schools, nursery schools, before-and-after school programs, senior care centers, elder care programs, and similar programs and facilities. A child/elderly development center includes the following accessory uses: counseling; education, training, and health and social services for the person or persons with legal charge of individuals attending the center, including, but not limited to, any parent, spouse, sibling, child, or legal guardian of such individuals. (46 DCMR 8286 and 53 DCR 10085)

Child development home - a dwelling unit used in part for the licensed care, education, or training of no more than six (6) individuals fifteen (15) years of age or less. Those individuals receiving care, education, or training who are not related by blood, marriage, or adoption to the caregiver shall be present for less than twenty-four (24) hours per day. This definition encompasses facilities generally known as a child care center, day-care center, pre-school, nursery school, before-and-after school programs, and similar programs and facilities. (29 DCR 4913)

Family home provider – operator of a licensed child development home providing child care services in the District of Columbia.

In-home care – child care services where the parent/guardian selects the provider to provide care in the child’s own home.

Market rate providers - are licensed child development centers and/or licensed child development homes that have no contract or provider agreement with the Office of the State Superintendent of Education, Division of Early Childhood Education to provide care for eligible children under the Child Care Subsidy Program.

OSSE/ECE contract providers - are licensed child development centers and/or licensed child development homes that have a contract or provider agreement with the Office of the State Superintendent of Education, Division of Early Childhood Education to provide care for eligible children under the Child Care Subsidy Program; however, all children enrolled at these facilities are not necessarily participants in the subsidy program.

Relative care – child care services where the parent/guardian selects the relative to provide care in the child’s own home.

75th percentile - the point at which 75 percent of child slots are lower in cost and 25 percent of slots are higher in cost.

Tiered Rate Reimbursement System (TRRS) - The differential reimbursement rates paid by the Office of the State Superintendent of Education. The TRRS is called "Going for the Gold" and has three tier levels: Bronze, Silver and Gold. Each level has criteria that must be met in order to receive the reimbursement rate associated with that tier. The *gold tier* is the highest reimbursement rate; the *bronze tier* is the lowest reimbursement rate. The levels are distinguished by quality standards that include national accreditation, compliance with licensing regulations, staff qualifications and staff training requirements, professional development, parent involvement, consumer satisfaction and environment.

Executive Summary

The Office of the State Superintendent of Education, Division of Early Childhood Education (OSSE/ECE), contracted with the Center for Applied Research and Urban Policy (CARUP) at the University of the District of Columbia to conduct the Market Rate and Capacity Utilization Study of child care providers in the District of Columbia. The first such study was conducted in 1998 and reported on provider characteristics, market rates for child care services, and child care capacity utilization and expansion needs in the city. This study reports the 2010 data from the seventh biennial market rate survey and provides additional information on compensation, benefits, and out-of-school time services offered by child care providers in the District of Columbia.

OSSE/ECE has undertaken several initiatives to improve early care and education services in the District of Columbia. However, there is a need to continually update data on market conditions surrounding early care and education services in the District of Columbia. In keeping with current data needs, this study was undertaken to:

- Provide current demographic data on the community of active licensed child care providers in the District of Columbia;
- Determine rates paid by the general public for child care services in the District of Columbia;
- Compare rates paid by the general public with rates paid by OSSE/ECE;
- Identify current compensation levels and types of benefits received by child care providers; and
- Describe out-of-school time activities offered by licensed child care providers in the District of Columbia.

The 2010 Market Rate and Expansion Capacity Study entailed internet, mail and telephone surveys of licensed Family home providers and licensed child care center providers in the District of Columbia.

The Study Population

The study population includes all active licensed child care providers offering child care services in the District of Columbia. The list of licensed providers was obtained from the Office of the State Superintendent of Education and included 156 names, addresses, and telephone numbers for licensed child development homes (family home providers) and 330 names, addresses, and telephone numbers for licensed child development centers (child care center providers) by ward.

The Survey Instrument

The survey instruments used in the 2008 study were modified and expanded for this survey. Adjustments to the previous survey instruments were made after consultations with the OSSE/ECE and a review of other state market rate survey instruments.

The preliminary survey instruments were refined on the basis of feedback received from ECE. Several questions were adapted from the Pennsylvania Early Childhood State Task Force's Early Care and Education Market Rate Survey instrument. A pretest was conducted of the refined instruments with a small sample of both family home and child care center providers.

Data Collection

CARUP staff conducted preliminary training sessions with the survey interviewers. These sessions covered characteristics of the child care community in the District of Columbia, child care regulations and terminology, the purpose of the survey, procedures for conducting the interviews, use of Survey Monkey, and role playing. Interviewers were supervised and monitored during the survey period and staff members were available to provide technical assistance.

Interviews were conducted at various times during the day, evening, and weekend and appointments were made for call backs at times convenient for the provider. A bilingual interviewer was available to provide language assistance in Spanish as needed. CARUP made up to eight attempts to contact all licensed child care providers in the District of Columbia.

Telephone calls were placed to all 156 licensed child development homes (family home providers). The survey instrument link was e-mailed to 178 licensed child development centers (child care center providers) with available e-mail addresses and a copy of the survey instrument was mailed to 152 child care center providers. Follow up telephone calls were made to all center-based providers not responding to the initial mailings. A second copy of the survey instrument was mailed, e-mailed or faxed upon request.

Number of Respondents

CARUP completed interviews with 72.7 percent of the 128 active family home providers and 69.5 percent of the 318 active child care center providers contacted. The response rate for the overall survey was 70.4 percent, representing 93 Family home providers and 221 child care center providers for a total of 314 completed interviews.

Provider Characteristics

- 1.1 Approximately 82.8 percent of Family home providers and 30.7 percent of child care center providers classify themselves as for profit operators, while 63.2 percent of child care center providers and 16.1 percent of family home providers

indicated they were nonprofit providers. More than seven (7.5) percent of providers are Head Start centers, 6.6 percent are Early Head Start providers, 9 percent are Montessori or private schools, and 7.5 percent are operated by faith-based organizations.

- 1.2 Most child care providers operate their services Monday through Friday. Nontraditional hours of care, including evening, overnight, Saturday and/or Sunday service, are offered by 19.4 percent of Family home providers and 7.5 percent of child care center providers.

The average number of hours of operation per day for both family and center-based child care providers is 11. More than 90.6 percent of family home providers and 87.6 percent of center providers operate between 9 and 12 hours per day. While most providers operate on a 7:00 a.m. to 6:00 p.m. schedule, 5.5 percent of center providers and 17.8 percent of family home providers operate 23 hour child care facilities; however, most of these providers are not currently offering 23 hour care.

Family home providers are closed an average of 21.3 days per year and child care centers are closed an average of 22.6 days per year.

- 1.3 Child care providers in the District of Columbia offer a wide range of child care services. Full-time child care services are offered by 97.8 percent of family home providers and 87.8 percent of center-based providers, while part-time services are available from 26.1 percent of family home providers and 28.8 percent of child care center providers. After school care is offered by 31.5 percent of family home providers and 26.9 percent of child care center providers.

Approximately one-fifth of family home providers and child care center providers have current services for children with disabilities.

- 1.4 Most child care providers have working computers with access to the internet. Overall, 73.8 percent of family home providers and 88.7 percent of child care center providers have internet access; however, market rate child care providers are more likely than OSSE/ECE contract child care providers to have internet access.

- 1.5 Child care centers responding to the survey employed 2,822 workers. Approximately 85.4 percent of those employees are directly involved with children in the classroom. The single largest employee group is teachers at 42.2 percent of all employees.

Approximately 64.6 percent of child care center employees and 55.0 percent of family home providers have educational experiences beyond the high school / GED level. Among family home providers, 39.9 percent have college degrees including: 6.5 percent with the Master's degree or higher, 5.4 percent with the Bachelor's degree, and 28 percent with the Associate's degree. Additionally, 54.8

percent have the Child Development Associate (CDA) certification. Many family home providers with the CDA also have college degrees.

Family home providers with OSSE/ECE contracts are more likely to have education beyond high school (75 percent) than are market rate providers (62.1 percent).

Approximately 53.1 percent of administrators, 50.0 percent of administrator/teachers, and 39.6 percent of teachers have a Bachelor's or higher degree. An additional 10 percent of administrators, 34 percent of administrator/teachers and 25.1 percent of teachers have an Associate's degree. While there are significant gains in the percentage of teachers with college degrees, there is a decline in the percentage of administrators with college degrees.

- 1.6 The average annual clock hours of training for family home providers has continued to decline. The median annual hours of training decreased by more than 40 percent and the percentage of providers reporting zero hours of training nearly doubled in the past two years. Clock hours of training include both on-the-job training and training during work and non-work hours.

The average annual clock hours of training for center-based employees increased in 2010. Average annual training hours range from a low of 6.8 hours for classroom aides to a high of 33.6 hours for teachers with a BA degree or higher. The smallest declines in average training hours occur for teachers with the CDA and assistant teachers. The largest increases in average training hours occur for teachers with a BA or higher degree and administrators.

- 1.7 Center providers were asked to give salary information for each employee category. Centers were also asked to provide the number of hours worked per week and the number of weeks worked per year for each category of employees. These figures were used to compute adjusted salary figures. For example, two employees with the same annual salary rate may have different hourly rates if their number of hours worked per week (and/or number of weeks worked per year) differs.

The mean beginning salary for a teacher with a Bachelor's degree is \$31,803 per year, or \$16.88 per hour. The median annual salary is \$30,000 (or \$15.00 per hour). The comparable salaries for a teacher with the CDA certification are \$25,272 per year (\$13.44 per hour) for the mean and \$24,960 per year (\$12.55 per hour) for the median. The mean salary shows the average salary earned based on the number of employees in that group. The median salary is that point at which one-half of the employees in that group earn more and one-half earn less.

Salaries increased for all positions except teachers with a bachelor's degree or higher, whose mean and median salaries declined by 17.2 percent and 3.8 percent, respectively. This drastic decline in salary for this teacher position was largely fueled by a 21.4 percent decrease among market rate providers. Still, market rate

provider salaries for teachers with a bachelor's degree or higher are 19 percent more than are salaries paid by OSSE/ECE contract child care center providers.

- 1.8 Benefits offered decreased in all categories since 2008 and the percentage of centers with no benefits increased substantially. While there is an increase in the percentage of family home providers with disability benefits, there are declines in the percentages of those with health, life insurance, retirement and paid leave benefits.

While 72.9 percent of child care center providers offered health insurance benefits to their employees in 2008, only 67.5 percent offered this benefit in 2010. Child care center providers offering paid sick leave declined from 83 percent in 2008 to 69.8 percent in 2010 and those offering paid vacation leave declined from 86 percent to 69.3 percent.

- 1.9 Rates were computed for each age category, for both full-time and part-time care, and annualized based on the reported hours per day, days per week, and months per year of care provided. Then, the annualized rate was multiplied by the number of enrolled slots for each age category. The per child gross revenue estimates were derived by dividing annual revenue by total enrollment at each center. Revenue estimates are based on enrollment charges and do not include fees, grants or non-cash benefits. Additionally, revenue estimates assume stable enrollment levels for the year.

Gross revenue received does not represent annual salary or annual net income received since operating expenses have not been deducted. For family home providers, the gross annual enrollment revenue has a mean average of \$38,728 and a median of \$36,242. Twenty-five percent of family home providers received less than \$25,007 in gross receipts.

The difference between gross revenue received by market rate centers and OSSE/ECE contract centers continues to be substantial; still, the gap has narrowed. Gross revenue received by market rate centers is 43.2 percent higher than revenue received by OSSE/ECE contract providers. However, market rate centers have an average enrollment of 57.1 children versus an average of 54.7 children at OSSE/ECE contract centers. When adjusted for enrollment differences, revenues are just 22.5 percent (or \$118,973) higher at market rate centers.

- 1.10 Approximately 38.5 percent of child care center providers and 24.2 percent of family home providers report that they have received accreditation from a professional accreditation organization. However, while 6.6 percent of family home providers cite the National Association for Education of Young Children (NAEYC) as their accrediting organization, NAEYC does not accredit facilities where the operator lives.

An additional 30.7 percent of child care center providers and 24.8 percent of family home providers are currently engaged in some step of the accreditation process. The most frequently cited accreditation organization for centers is the

National Association for the Education of Young Children (NAEYC) at 31.6 percent and for Family home providers is the National Association for Family Child Care (NAFCC) at 14.3 percent.

Family Home Provider Rates

2.1.1. While 29.1 percent of infant slots were with market rate providers in 2008, in 2010 approximately 36 percent of all family home provider slots for infants (children ages 6 weeks through 12 months) are with market rate providers. The full-time market daily rate for infants declined to \$46.00. The rate increased for providers with OSSE/ECE contracts or provider agreements to a daily rate of \$40.50. The total pool of family home providers has a daily rate of \$45.00.

2.1.2. The full-time daily market rate for children age 1-year is \$47.50. Approximately 23.3 percent of 1-year-olds are enrolled with market rate providers. Providers with OSSE/ECE contracts or provider agreements have a daily rate of \$36.00. The total pool of family home providers has a rate of \$37.50 per day.

The full-time daily market rate for children age 2-years is \$50.00. Providers with OSSE/ECE contracts or provider agreements have a daily rate of \$34.25. The total pool of family care providers has a rate of \$35.00. Approximately 28.3 percent of 2-year-olds are enrolled with market rate providers.

2.1.3. The full-time daily market rate for preschool children (age 3-years) is \$62.50 per day. The full-time rate for providers with OSSE/ECE contracts or provider agreements is \$33.00. The rate for the total pool of providers is \$35.00.

The full-time daily market rate for children age 4-years is \$55.25, while the rate for OSSE/ECE contract providers is \$31.00. The rate for total providers for children age 4-years is \$31.50 per day. There are few 4-year-olds enrolled full-time with family home providers.

2.1.4. The full-time daily rate for school-age children (over 4-years old) is set by the OSSE/ECE at the full-time rate charged when school is closed. For market rate providers that rate is \$52.50 per day. Providers with OSSE/ECE contracts or provider agreements have a rate of \$25.80 per day. The rate for total providers is \$27.25 per day.

Child Care Center Provider Rates

2.2.1. Approximately 35.4 percent of all enrolled center-based infant care slots are with market rate providers. The full-time daily market rate for infants is \$75.29. Providers with OSSE/ECE contracts or provider agreements have a daily rate of \$60.00. The rate for total providers is \$70.40 per day.

2.2.2. The full-time daily market rate for children age 1-year is \$72.47. Approximately 40.5 percent of 1-year-olds are with market rate providers and 59.5 percent are with OSSE/ECE contract providers. Providers with OSSE/ECE contracts or

provider agreements have a daily rate of \$55.61. The total pool of child care center providers has a rate of \$67.44 per day.

The full time daily market rate for 2-year-olds is \$64.20. Providers with OSSE/ECE contracts or provider agreements have a rate of \$51.00 per day. The total pool of center-based providers has a daily rate of \$58.66. Just 28.2 percent of center-based slots for 2-year-olds are with market rate providers and 71.8 percent are with OSSE/ECE contract providers.

2.2.3. The full-time daily market rates for preschool children (ages 3- and 4-years) are \$57.78 per day and \$57.60 per day, respectively. The rate for providers with OSSE/ECE contracts or provider agreements is \$46.19 for 3-year-olds and \$50.00 for 4-year-olds. The rate for the total pool of providers is \$53.49 per day for 3-year-olds and \$54.04 for 4-year-olds per day. Approximately 59 percent of 3-year-olds and 4-year-olds are enrolled OSSE/ECE contract providers and 41 percent are with market rate providers.

2.2.4. The full-time daily rate for school-age children is set by the OSSE/ECE at the full-time rate charged when school is closed. For market rate providers the rate is \$57.30 per day. Providers with OSSE/ECE contracts or provider agreements have a rate of \$45.00 per day. The rate for the total pool of providers is \$54.00 per day. Just more than 17 percent of school-age children in full-time care with child care center providers are with market rate providers and 82.9 percent are with OSSE/ECE contract providers.

Other Rates

2.3 Approximately 19 percent of child care center providers have children enrolled in part-time care. Among these providers, 23.7 percent have minimum hour requirements and are primarily market rate providers. Some providers require a minimum number of days, some a minimum number of hours per day, per week or per month. Thus, part-time rates are not readily comparable.

Fewer than 8 percent of family home providers and 2 percent of center providers reported rates for nontraditional hours of care

Capacity Utilization and Expansion

3.1 The number of licensed child development homes and child development centers declined since 2008 by 22.4 percent and 2.4 percent, respectively. However, there was a net increase of 5 percent in total licensed capacity.

Nearly one-third (31.8 percent) of all family home providers and 16.6 percent of all child care center providers operating in 2008 were no longer in business in 2010. These losses in service providers were somewhat offset by the addition of 48 newly licensed child development centers and 19 newly licensed child development homes during this two-year period.

- 3.2 Survey respondents have a licensed capacity of 15,100 child care slots. Family home providers are licensed for 518 slots and child care center providers are licensed for 14,582 slots. The capacity utilization for family home providers is 76.1 percent; for child care center providers, it is 82.3 percent; and for total providers it is 82.1 percent. The capacity utilization declined since the 2008 market rate survey when 85.6 of slots were used.

While 87.8 percent of current center capacity is being utilized at market rate child care centers, just 79.5 percent of center capacity is being utilized at OSSE/ECE contract child care centers. However, among family home providers, OSSE/ECE contract providers utilize 81 percent of capacity while market rate providers utilize 67.1 percent of capacity.

- 3.2 Most family home providers and child care center providers maintain waiting lists for families seeking child care services at their facilities when no slots are available for the requested age group. These waiting lists are not related to the Child Care Subsidy Program. OSSE/ECE does not have a waiting list for families seeking child care subsidies.

There are currently 10,377 children on provider waiting lists. Children zero to three years of age hold 7,381 waiting list slots, or 72.8 percent of the total. Prekindergarten children (ages 3- and 4-years) hold 2,220 of the remaining slots or 21.9 percent of the total.

Children are on provider waiting lists in all wards in the District of Columbia. However, more than half (56.8 percent) of children are waiting for slots in child care facilities located in Wards 1 and 2, and an additional 24.2 percent are waiting for slots in Wards 6 and 8. More than half of infants are waiting for slots in Wards 2 and 6, the central business district.

Out-of-School Time Services (OST)

- 4.1 In 2008, approximately 39.1 percent of child care center providers and 19.2 percent of family homes offered special programs before school, after school, and/or during the summer for school-age children; however, just 27.4 percent of child care center providers and 18.3 percent of family home providers offer OST programs in 2010. Nearly 72.3 percent of school-age children (enrolled in child care centers) are enrolled in centers providing special programs for school-age children.
- 4.2 Family home providers offering OST programs are located in Wards 2, 5, 6, 7, and 8. Center providers are located throughout the District of Columbia. If we look at the distribution of total center providers offering OST programs, the highest percentage of centers are in Ward 6 and the lowest percentage in Ward 1. However, if we examine the availability of OST programs as a percentage of the centers within a ward, then centers in Ward 7 (60 percent), Ward 6 (45.2 percent), and Ward 8 (31 percent) are the most likely to offer programs.

- 4.4 Centers in Wards 1 and 3 are the most likely to offer both before and after school programs. Centers in Wards 2, 5 and 7 are the most likely to offer summer programs for school-age children. Ward 3 centers continue to be the least likely to provide summer programs.
- 4.5 Providers with OST programs offer a wide variety of activities for children. However, the types of activities in which children participate vary by ward. Arts and crafts are the top ranked activity in Wards 1 and 2 and the second ranked activity in Ward 6. Field trips are the top ranked activity or tied for the top ranked activity in all wards except Wards 1 and 4. Homework assistance is the top ranked activity in Ward 1 and the second ranked activity in Ward 3. Dance and drama are tied for the top ranked activity in Ward 4.

Most child care providers do not charge additional fees for OST activities; however, some do charge a registration fee for these programs.

Provider Difficulties and Challenges

- 5.1 More than 71 percent of family home providers and 57.6 percent of child care providers find it somewhat difficult or very difficult to make ends meet in operating their child care programs. However, 41.1 percent of market rate centers indicated that they were having no difficulty at all making ends meet.
- 5.2 Child care center providers were asked about challenges they face in recruiting and retaining staff. They were given six areas of challenges to rate: high competition; qualified people; lack of advancement opportunities; job stress; low pay; and low benefits. Child care center providers identified finding qualified people, low pay, and high competition as their biggest areas of challenge.

Provider Priorities on Needed Action

- 5.3 Family home providers and child care center providers were asked to provide a maximum of three priority actions that the District of Columbia government should take related to early childhood services. Recommendations merged around four themes: system changes, increases in child care rates, additional supports, and training and/or professional development supports.
- 5.4 Child care providers' recommended systems changes include: reduction of bureaucracy and paperwork requirements; improved communications, including a DC Twitter for provider input; establishment of a reliable substitute teacher organization; development of policies and/or structures to help providers stay afloat when provider resources are limited.
- 5.5 Providers are requesting increases in child care reimbursement rates more often to ensure that rate increases keep pace with rising operating costs.
- 5.6 Providers recommend the establishment of wage supplements for teachers, insurance and benefit pools to reduce costs to individual providers, assistance

with supplies and equipment, and paid leave for family home providers.

- 5.7 In the area of training/professional development, providers recommend increased funding for college degree programs and tuition reimbursement assistance; more diversified training by OSSE; more enhanced professional development opportunities; more specialized training sessions on working with children with special needs; and creation of a development program for center directors.
- 5.8 Providers also expressed concerns about the best environment for young children.

One provider seemed to capture the overall essence of what other providers were expressing:

“Strengthen the value, respect and support for community-based programs.”

1. INTRODUCTION

Federal statute (45CFR 98.16 and 98.43) requires that the District of Columbia, as part of its Child Care and Development Fund (CCDF) Plan, show how payment rates are adequate to ensure equal access to child care services for eligible children comparable to services available to families not participating in the subsidy programs (Office of Child Care 2009). The city is required to conduct a local market rate survey biennially to facilitate development of its CCDF Plan.

The Office of the State Superintendent of Education, Division of Early Childhood Education (OSSE/ECE) contracted with the Center for Applied Research and Urban Policy (CARUP) at the University of the District of Columbia to conduct the Market Rate and Capacity Utilization Study of child care providers in the District of Columbia. The first such study was conducted in 1998 and reported on provider characteristics, market rates for child care services, and child care capacity utilization and expansion needs in the city. This study reports the 2010 data from the seventh biennial market rate survey and provides additional information on compensation, benefits, and out-of-school time services offered by child care providers in the District of Columbia.

The United States Census Bureau's Annual Population Estimates shows the city's population ages 0 through 17 at 114,036 in 2009. Approximately 37,144 of the children were ages 0 through 4 and 52,236 were ages 5 through 13 for a total of 89,380 children ages 0 through 13 in 2009. The total estimated population for 2009 increased from 591,000 in 2008 to 599,657. While there was a net growth of 1.5 percent in the total population, there was a 2.6 percent increase in the estimated population under 5 years of age (US Census Bureau, Population Division Vintage 2009).

According to the 2009 American Community Survey's 1-year estimates, the median household income in the District of Columbia is \$57,936. However, nearly 54 percent of the city's children live in households with incomes below 200 percent of the federal poverty level. The US Census, Current Population Survey, reports that in 2009: 31.3 percent of the city's children live in families with incomes 100 percent below the federal poverty level; 36.9 percent in families 125 percent below the poverty level; 44.8 percent in families 150 percent below the poverty level; and 53.9 percent in families 200 percent below the poverty level. The District of Columbia's eligibility threshold for participation in the Child Care Subsidy Program is 250 percent below the poverty level. Thus, at minimum, an estimated 48,176 children under 14 years of age are potentially eligible to participate in child care subsidy programs.

The number of licensed child care providers has continued to decline, while the number of young children has continued to increase over the past decade. The pool of licensed child care providers has declined even more significantly during the past two years. There are

22.8 percent fewer licensed child development homes and 2.4 percent fewer licensed child development centers in the city than in 2008.

The landscape of early care and education services has been reshaped by major changes in regulation and public operations since the 2008 market rate survey. The Pre-k Enhancement and Expansion Act of 2008, enacted in 2008 and amended in 2010, marshaled in universal pre-k programs for 3- and 4-year old children in the District of Columbia. This legislation expands the service environment to include publically funded programs at public schools, public charter schools, and eligible community-based organizations. Additionally, in 2009, the Department of Parks and Recreation ceased operating its extensive system of licensed child development facilities. Many of the before and after programs are now operated by the District of Columbia Public Schools (DCPS) whose sites are not included in the list of licensed child development facilities. Some programs were merged with community-based organizations and others ceased to exist.

The quality and cost of child care are enduring issues in the District of Columbia, as well as in other urban areas. Using the 2008 market rate data for the District of Columbia, a family with one infant and one preschooler using full-time 12 month services would pay the following annual cost for child care at a child care center charging market prices for care:

Infant	(@ \$69.28 per day or \$1,500 per month)	\$18,000
Preschool	(@ \$61.89 per day or \$1,340 per month)	<u>\$17,160</u>
Total 2008 Annual Child Care Cost		\$35,160

This cost would consume 60.1 percent of the 2009 median household income in the city. The comparative cost for a family at a center participating in the Child Care Subsidy Program is \$27,487 per year or 47.4 percent of the 2009 median household income. Thus, there continues to be a critical need for affordable, quality early care and education options throughout the city.

The cadre of qualified and dedicated early care and education professionals in the District of Columbia continues to receive comparatively low wages and often limited benefits. Previous data from the 2008 market rate survey estimated the median annual salary for a child care teacher with a bachelor's degree at \$31,200 and classroom aides at \$16,320. Approximately 28.1 percent of the center-based workforce also received no health insurance benefits and 48.1 percent received no retirement benefits in 2008. These figures show little improvement in salaries and a decline in benefits since 2006. These working conditions often lead to high turnover rates and continue to constrain the centers' ability to attract qualified personnel in spite of a need for services.

OSSE/ECE has undertaken initiatives to improve child care services using data from the previous market surveys. However, there is a need to continually update data on market conditions surrounding early care and education in the District of Columbia. In keeping with current data needs, this study was undertaken to:

- Provide demographic data on the community of active licensed child care providers

in the District of Columbia;

- Determine rates paid by the general public for child care services in the District of Columbia;
- Compare rates paid by the general public with rates paid by the Office of the State Superintendent of Education, Division of Early Childhood Education;
- Identify current compensation and types of benefits received by child care providers; and
- Describe out-of-school time activities offered by licensed child care providers in the District of Columbia.

The Market Rate and Capacity Utilization Study entailed on-line, mail and telephone surveys of licensed child development home providers and licensed child development center providers in the District of Columbia. This report discusses the research methodology used for the study, and presents findings and conclusions on:

- Provider characteristics;
- Child care rates for market rate and subsidized child care providers;
- Child care capacity utilization;
- Compensation, benefits, and workforce characteristics of child care providers in the city;
- Out-of-school time services; and
- Provider difficulties, challenges, and priorities

2. RESEARCH METHODOLOGY

This report presents the findings of the seventh comprehensive market study of licensed child care services in the District of Columbia. The first study, “1998 Market Rate and Capacity Utilization,” served as the benchmark for subsequent reports. Additionally, a review was conducted of current literature on market rate survey techniques, previous child care rate surveys, the cost and quality of child care services, and compensation, benefits, and retention rates for child care providers. Consultations were conducted with researchers, providers, and public officials in the District of Columbia prior to developing the survey instrument.

The Study Population

The study population includes all active licensed child care providers offering child care services in the District of Columbia. The District of Columbia licenses all providers of child care services except: relative and in-home providers; District of Columbia Public Schools and Public Charter Schools; and facilities operated by the federal government on federal property.

The 2010 list of licensed providers was obtained from the Office of the State Superintendent of Education, and included 156 names, addresses, and telephone numbers for family child care homes and 330 names, addresses, and telephone numbers for child care centers by ward. The list was provided in the format of an EXCEL spreadsheet.

Each provider was assigned a unique identification code number. Those providers participating in the previous studies retained the code number originally assigned.

Survey Instrument

The survey instrument used in the 2008 study was modified for this survey. Adjustments to the previous survey instrument were made after a review of other state survey instruments and consultations with OSSE/ECE.

The preliminary survey instruments were refined on the basis of feedback received from OSSE/ECE and a review of other state market rate surveys. Several questions were adapted from the Pennsylvania Early Childhood Task Force’s Early Care and Education Market Rate Survey. A pretest was conducted of the refined instrument with a small sample of both family home and child care center providers. The final survey instrument asks providers a series of questions on: service characteristics; provider/employee

characteristics; full-time and part-time child care enrollment and rates; workforce characteristics; capacity utilization; out-of-school time services; and provider difficulties, challenges, and recommendations. The survey instruments were developed using Survey Monkey as the data collection tool.

The telephone interview with family home providers took an average of 20 minutes to complete. The survey instrument link was e-mailed to centers with available e-mail addresses and a copy of the survey was mailed to other center providers. Follow-up telephone calls were made to both centers receiving e-mail links and centers receiving mailed survey forms, and technical assistance was provided via telephone. The final survey instruments are included in Appendix A of this report.

Publicizing the Survey

Providers were continuously reminded of the upcoming survey at a variety of professional meetings and workshops attended by child care providers.

CARUP mailed letters explaining the survey objectives and process to the 486 child care providers at the addresses provided by the licensing division. For letters returned undelivered, the provider name was cross-checked on the list of providers from the Washington Child Development Council (the District of Columbia's resource and referral agency) and internet telephone directories. A second letter was sent to providers where a corrected address could be obtained.

Data Collection

CARUP staff conducted preliminary training sessions with the survey interviewers. These sessions covered characteristics of the child care community in the District of Columbia, child care regulations and terminology, the purpose of the survey, procedures for conducting the interviews, use of Survey Monkey, and role playing. Interviewers were supervised and monitored during the survey period and staff members were available to provide technical assistance.

Interviews were conducted at various times during the day, evening, and weekend and appointments were made for call backs at times convenient for the provider. A bilingual interviewer was available to provide language assistance in Spanish as needed. CARUP made up to eight attempts to contact all licensed child care providers in the District of Columbia.

Telephone calls were placed to all 156 licensed child development homes (family home providers). The survey instrument link was e-mailed to 178 licensed child development centers (child care center providers) with available e-mail addresses and a copy of the survey instrument was mailed to 152 child care center providers. Follow up telephone calls were made to all center-based providers not responding to the initial mailing. A second copy of the survey instrument was mailed, e-mailed or faxed upon request.

Survey Response Rates

Of the 486 providers on the original list, 8.2 percent were either no longer in business, had disconnected or non-working telephone numbers, or had wrong numbers where valid telephone numbers could not be found. This represents 3.6 percent of licensed child care center providers and 17.9 percent of licensed family home providers. Additionally, there was one duplicate listing for family home providers. These providers were removed from the list of active licensed providers, the target population for this study. Therefore, as shown in Table 1 below, the pool of active licensed providers operating in the District of Columbia was reduced to 446 providers, consisting of 128 family home providers and 318 child care center providers.

TABLE 1
SURVEY RESPONSE RATES

PROVIDER STATUS	FAMILY HOME PROVIDERS No. (%)		CHILD CARE CENTER PROVIDERS No. (%)		TOTAL PROVIDERS No. (%)	
	2008	2010	2008	2010	2008	2010
Licensed Providers*	202	156	338	330	540	486
Additions	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)
No Longer in Business	28 (13.9%)	16 (10.3%)	8 (2.4%)	3 (1.0%)	36 (6.7%)	19 (3.9%)
Disconnected/Non-working Telephone	10 (5.0%)	4 (2.7%)	1 (0.3%)	3 (1.0%)	11 (2.0%)	7 (1.4%)
Wrong Number (no new number found)	0 (0.0%)	7 (19.5%)	0 (0.0%)	6 (2.0%)	0 (0.0%)	13 (2.7%)
Duplicate Listings	2 (1.0%)	1 (0.6%)	0 (0.0%)	0	2 (0.4%)	1 (0.2%)
Total Active Licensed Providers	162	128	329	318	491	446
Refusals	4 (2.5%)	10 (7.8%)	18 (5.5%)	23 (7.0%)	22 (4.5%)	33 (7.4%)
Wrong Number (non-published number)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0%)	0 (0.0%)	0 (0.0%)
No Answer/No Response	12 (7.4%)	25 (19.5%)	53 (16.1%)	74 (23.0%)	65 (13.2%)	99 (22.2%)
Completed Interviews	146 (90.1%)	93 (72.7%)	258 (78.4%)	221 (69.5%)	404 (82.3%)	314 (70.4%)

*Source: Office of the State Superintendent of Education 3/08 and 2/10

CARUP completed interviews with 72.7 percent of the 128 active family home providers and 69.5 percent of the 318 active child care center providers contacted. The response rate for the overall survey was 70.4 percent, representing 93 family home providers and 221 child care center providers for a total of 314 interviews. There were decreases in the Year 2010 response rates for both family home providers and child care center providers in comparison to the 2008 response rates. Refusals included the increasing number of corporate-owned child care centers not allowing participation in local surveys and providers who believe that the survey results on rates would not be used to establish new reimbursement rates.

Survey Demographics

Family home providers are licensed for a maximum of up to six children, depending on the ages of the children and space. Family home providers participating in the OSSE/ECE Child Care Subsidy Program were much more likely to participate in the market rate survey. While 50.6 percent of active licensed family home providers are market rate providers and 49.4 percent are OSSE/ECE contract providers, among family home survey respondents, 31.2 percent are market rate providers and 68.8 percent are OSSE/ECE contract providers.

The mean size (licensed capacity) of child care center-based survey respondents is 66. The mean size of child care center-based non-respondents is 69. Among child care center providers, 37.7 percent of licensed active providers and 35.3 percent of survey respondents are market rate providers and 62.2 percent of licensed active providers and 64.7 percent of survey respondents are OSSE/ECE contract providers.

The survey respondents represent providers from all areas of the city. The distribution of survey responses by ward is presented in Table 2. Non-respondents are also distributed throughout all wards of the city (see Appendix B).

TABLE 2
LOCATION OF SURVEY RESPONDENTS BY WARD

WARD	FAMILY HOME PROVIDERS No. (%)		CHILD CARE CENTER PROVIDERS No. (%)		TOTAL PROVIDERS No. (%)	
	2008	2010	2008	2010	2008	2010
Ward 1	8 (5.5%)	2 (2.2%)	27 (10.5%)	23 (10.4%)	35 (8.7%)	25 (8.0%)
Ward 2	7 (4.8%)	2 (2.2%)	57 (22.1%)	49 (22.2%)	64 (15.8%)	51 (16.2%)
Ward 3	3 (2.1%)	3 (3.2%)	26 (10.1%)	18 (8.1%)	29 (7.2%)	21 (6.7%)
Ward 4	27 (18.4%)	15 (16.1%)	26 (10.1%)	24 (10.9%)	51 (13.1%)	39 (12.4%)
Ward 5	19 (13.0%)	14 (15.1%)	27 (10.5%)	27 (12.2%)	46 (11.4%)	41 (13.1%)
Ward 6	24 (16.4%)	12 (12.9%)	32 (12.4%)	31 (14.0%)	56 (13.9%)	43 (13.7%)
Ward 7	36 (24.7%)	22 (23.7%)	24 (9.3%)	20 (9.0%)	60 (14.9%)	42 (13.4%)
Ward 8	22 (15.1%)	23 (24.7%)	39 (15.1%)	29 (13.1%)	61 (15.1%)	52 (16.6%)
Total	146 (100%)	93 (100%)	258 (100%)	221 (100%)	404 (100%)	314 (100%)

*Source: Office of the State Superintendent of Education 3/08 and 2/10

Survey Data Analysis

CARUP staff downloaded the raw data as Survey Monkey Excel files. Variable names were entered into the Excel spreadsheet. CARUP staff verified and cleaned the survey data and imported the data into SPSS 16.0 software for data analysis. The case summaries, frequencies, descriptive statistics, cross tabulations, and ANOVA statistics were used to analyze data for this report.

Child care rates reflect prices charged for child care services, not the cost of providing these services. While rate data were collected from the class of all active licensed providers in the District of Columbia, rates were analyzed separately for market rate providers with no OSSE/ECE contracts or provider agreements to provide child care services for eligible children under the Child Care Subsidy Program; OSSE/ECE contract providers with OSSE/ECE contracts or provider agreement to provide child care services for eligible children under the Child Care Subsidy Program; and for total providers including both market rate providers and OSSE/ECE contract providers.

Providers without rates, i.e., offering free child care services to client populations, were not included in the rate analysis. However, information on these providers is included in the descriptive profiles and capacity analysis sections of this study.

CARUP, using SPSS 16.0 software, calculated rates at the 75th percentile. The rate data was weighted by enrollment, thereby reflecting the number of child care slots actually filled at the various rates, rather than the number of providers offering those rates. Child care slots were ranked from highest cost to lowest. The 75th percentile represents the point at which 75 percent of the child slots are below this cost and 25 percent of slots are higher in cost.

Rates for family home provider child care slots were computed separately from rates for child care center provider child care slots. Also, providers were divided into two groups: (1) market rate providers, defined as those without OSSE/ECE subsidy contracts or provider agreements; and (2) providers with OSSE/ECE contracts or provider agreements. Rates were computed for each group and for the total provider group for comparative purposes.

Full-time and part-time rates were computed for eight age groups:

- Infant
- Age 1 year
- Age 2 years
- Age 3 years
- Age 4 years
- Age 5 years
- Ages 6 through 12 years
- Ages 13 through 18 years

Rates were computed separately for school-age children when school is closed and for nontraditional hours of care. Full-time rates when school is closed are weighted by the number of child care slots. Providers were asked to report the number of children with

disabilities; however, they were not asked for specific rates for this population.

Providers were asked to report their regular rates and indicate whether those rates were charged hourly, daily, weekly, monthly, or annually. Providers were also asked the number of hours per day of care, days per week of care, and months per year of care provided for the typical child in each age group. These figures were used to compute comparative rates. A month was equated to 4.33 weeks.

Providers reported part-time rates separately. Part-time hours per day, days per week, and months per year were also ascertained. These figures, reflecting actual care provided, were used to compute comparative rates.

3. FINDINGS

3.1 PROVIDER CHARACTERISTICS

Types of Providers

Approximately 82.8 percent of family home providers classify themselves as “for profit” providers, 2.2 percent are part of a child care system, and 15.1 percent are 23-hour providers. There was a substantial decline in the number of family home providers identifying themselves as a part of a child care system.

While most child care centers (63.2 percent) are nonprofit providers, an increasing number (30.7 percent) of centers self-identify as “for profit” providers and 9.9 percent are part of a child care system. The District of Columbia government no longer operates child development centers through the Department of Parks and Recreation; thus, there was a substantial decline in District Government agency providers (from 10.1 percent in 2008 to 1.4 percent of the child care centers in 2010). Head Start comprises 7.5 percent of center providers, 6.6 percent are Early Head Start providers, 9 percent are Montessori or private schools, and 7.5 percent are faith-based organizations.

The decline in centers identifying as part of a system is largely attributable to the decline in Head Start providers and DC Parks and Recreation providers.

Table 3 identifies the type of provider by category as indicated by the provider.

Days and Hours of Operation

Approximately 90.6 percent of child care providers operate their services Monday through Friday. Twelve percent of Family home providers and 4.5 percent of child care center providers offer regular weekend hours.

The average number of hours of operation per day for both family and center-based child care providers is 11 hours. More than 90.6 percent of family home providers and 87.6 percent of child care center providers operate between 9 and 12 hours per day. Additionally, 17.8 percent of family home providers and 5.5 percent of child care center providers operate more than 12 hours per day. Most providers operate on a 7:00 a.m. to 6:00 p.m. schedule.

TABLE 3
TYPES OF PROVIDERS*

TYPE	% OF FAMILY HOME PROVIDERS		% OF CHILD CARE CENTER PROVIDERS	
	2008	2010	2008	2010
Nonprofit Provider	4.1%	16.1%	59.7%	63.2%
For Profit Provider	95.2%	82.8%	25.2%	30.7%
A Cooperative	1.1%	0.0%	3.1%	1.4%
District Government Agency Provider	4.1%	0.0%	10.1%	1.4%
Federal Government Provider	1.4%	0.0%	1.2%	.5%
Part of a Child Care System	44.5%	2.2%	26.0%	9.9%
23-Hour Provider	13.7%	1.1%	1.6%	.9%
Head Start Provider	6.2%	0.0%	12.4%	7.5%
Early Head Start Provider	0.7%	0.0%	7.3%	6.6%
Employer / Corporate	0.0%	0.0%	3.5%	1.9%
Montessori	0.0%	0.0%	1.6%	2.4%
Child Development Center	1.1%	0.0%	36.8%	29.2%
Private School	N/A	0.0%	7.4%	6.6%
Faith-Based Provider	0.7%	1.1%	9.3%	7.5%

Other	3.4%	0.0%	3.5%	10.4%
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* Providers self-identified their type in the 2008 and 2010 Market Rates and Capacity Utilization Surveys. Approximately 19.4 percent of family home providers and 7.5 percent of centers offer nontraditional hours of care (evening, overnight and / or weekend care). As shown in Table 4, while providers offering nontraditional hours of care are distributed throughout the city, this type of service is more readily available in Wards 7 and 8. No licensed family home providers in Wards 1 and 3 currently offer nontraditional hours of care.

Table 4
PERCENT OF PROVIDERS OFFERING NONTRADITIONAL HOURS
BY WARD

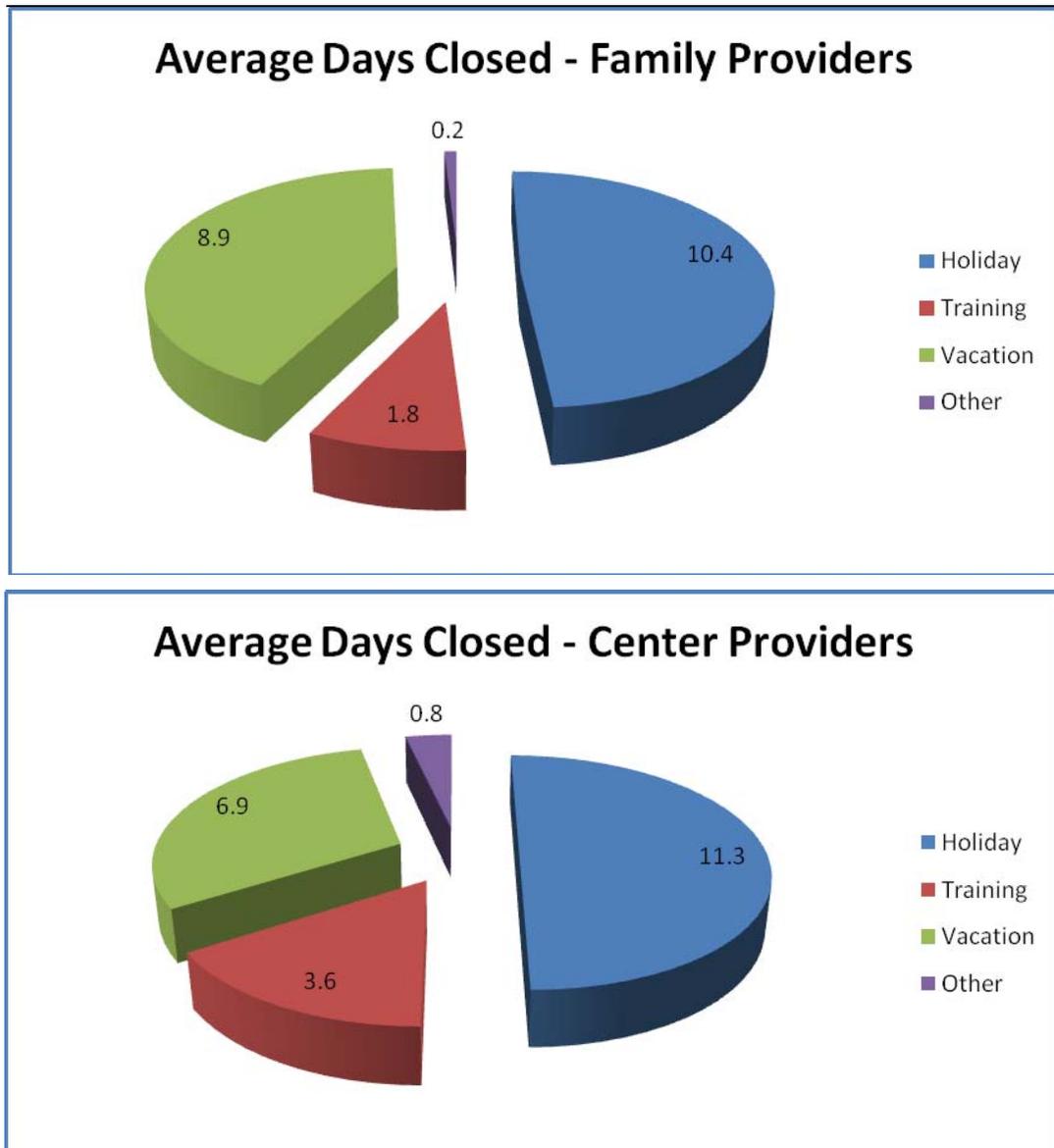
Ward	% of Family Home Providers	% of Child Care Center Providers
Ward 1	0.0%	0.0%
Ward 2	50.0%	7.0%
Ward 3	0.0%	5.9%
Ward 4	6.7%	3.8%
Ward 5	7.1%	8.0%
Ward 6	16.7%	3.1%
Ward 7	27.3%	19.0%
Ward 8	30.4%	16.0%

Source: 2010 Market Rate Survey

Most child development centers (86.7 percent) operate 12 months per year. Nonetheless, 2.9 percent of centers operate 9 months or less per year and 10.5 percent operate 10 to 11 months per year. Most family home providers (96.7 percent) operate 12 months per year.

Family home providers are closed an average of 21.3 days per year and child care centers are closed an average of 22.6 days per year. This represents an average increase of 3 days closed for family homes and 5 days closed for centers. As Figure 1 shows, while center providers are closed more days for holidays and training, family home providers are closed more often for vacation days.

FIGURE 1
AVERAGE DAYS CLOSED BY PROVIDER TYPE (2010)



Source: 2010 Market Rate Survey

Types of Services Offered

As shown in Table 5, child care providers in the District of Columbia offer a wide range

of child care services. Full-time child care services are offered by 97.8 percent of family home providers and 87.7 percent of center-based providers, while part-time services are available from 26.1 percent of family homes and 28.8 percent of centers. Evening, overnight, Saturday, and Sunday care is more limited at child development centers. While Saturday care is available at 8.7 percent of family home providers and 2.4 percent of centers, few child care providers offer regular Saturday hours.

Family home providers are more likely to offer a variety of child care services; however, their capacity is very limited. Services for children with disabilities are available at approximately 20 percent of family homes and child care centers. The percentage of centers offering services for children with disabilities declined substantially from the 2008 levels (51.2 percent).

TABLE 5
TYPES OF SERVICES OFFERED BY PROVIDERS (2010)

TYPES OF SERVICES	% FAMILY HOME PROVIDERS	% CHILD CARE CENTER PROVIDERS
Full-time Care, 35 hours per week or more	97.8%	87.7%
Part-time Care, less than 35 hours per week	26.1%	28.8%
Evening Care	18.5%	5.7%
Overnight Care	10.9%	2.8%
Saturday	8.7%	2.4%
Sunday	6.5%	1.4%
Before School	31.5%	25.0%
After School	31.5%	26.9%
Full Day during School Closing	16.3%	18.4%
Drop-In	8.7%	10.4%
Holiday	2.2%	3.8%
Mildly Ill or Sick Children	5.4%	2.4%
Children with Disabilities	19.6%	20.3%
Emergency or Back-Up Care	18.5%	8.0%

Transportation	3.3%	6.1%
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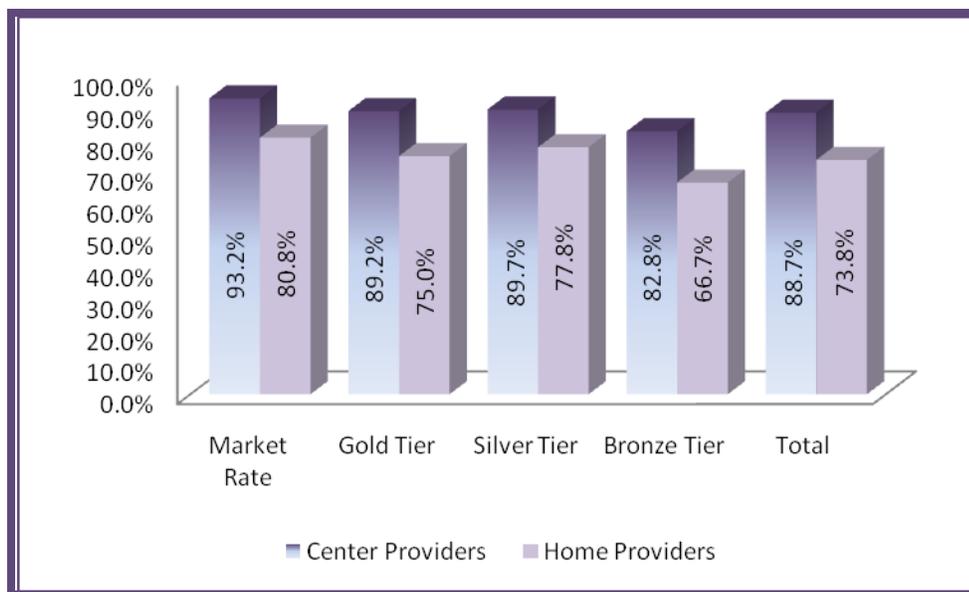
Source: 2010 Market Rate Survey

Access to the Internet

Most child care providers have working computers with access to the internet. Overall, 73.8 percent of family home providers and 88.7 percent of child care center providers have internet access; however, market rate child care providers are more likely than OSSE/ECE contract child care providers to have internet access.

Figure 2 illustrates the percentage of child care providers with working computers with internet access by tier level. Bronze tier providers, among both family home providers and child care center providers, are the least likely to have internet access.

FIGURE 2
CHILD CARE PROVIDERS WITH WORKING COMPUTER
WITH INTERNET ACCESS (2010)



Source: 2010 Market Rate Survey

Number of Employees and Staffing Patterns

Child care center providers responding to the survey employed 2,822 workers.

Approximately 85.4 percent of employees are directly involved with children in the classroom. As indicated in Table 6, the single largest employee group is teachers (42.2 percent) followed by assistant teachers.

TABLE 6
NUMBER OF CHILD CARE CENTER EMPLOYEES BY POSITION (2010)

JOB TYPE	NUMBER OF EMPLOYEES	% OF TOTAL EMPLOYEES
Administrators	304	10.8%
Teachers	109	3.9%
Administrator / Teachers	1197	42.2%
Assistant Teachers	923	32.7%
Classroom Aides	182	6.4%
Other	107	3.8%
Total Employees	2,822	100.0%

Source: 2010 Market Rate Survey

There are significant changes in the staffing patterns of both market rate child care center providers and child care center providers with OSSE/ECE contracts or provider agreements since the 1998 market survey. Overall, the ratio of child to staff declined in all employee categories. Furthermore, the difference in ratios between market rate child care center providers and OSSE/ECE contract child care center providers narrowed.

Staffing patterns at child care centers are shown in Table 7. Both market rate providers and OSSE/ECE contract providers have similar ratios of children to classroom employees, 4.6 to 1 and 4.9 to 1, respectively. In 1998, this ratio was 5.5 to 1 for market rate providers and 7.3 to 1 for OSSE/ECE contract providers. The ratio of children to teacher declined from 11.4 to 1 in 1998 to 6.9 to 1 in 2008, but increased to 9.4 to 1 in 2010 for market rate providers. For OSSE/ECE contract providers, the child to teacher ratio fell from 17.3 to 1 in 1998 to 9.1 to 1 in 2008 and increased to 9.8 to 1 in 2010.

TABLE 7
STAFFING PATTERNS AT CHILD CARE CENTERS (2010)

STAFF	MARKET RATE PROVIDERS N=78	OSSE/ECE CONTRACT PROVIDERS N=143	TOTAL PROVIDERS N=221
Teachers	5.8	5.2	5.4
Administrator / Teachers	.4	.5	.5
Assistant Teachers	4.9	4.2	4.2
Classroom Aides	.6	.8	.8
Administrators	1.4	1.4	1.4
Other	.5	.5	.5
Total Employees	13.6	12.3	12.8
Average Number of Children Enrolled	54.2	51.4	53.3
Child : Staff Ratio	4.0:1	4.2:1	4.2:1
Child : Teacher	9.4:1	9.8:1	9.8:1
Child: Admin. / Teacher	124.4:1	98.0:1	108.1:1
Child : Asst. Teacher	11.0:1	13.7:1	12.8:1
Child : Classroom Aide	86.3:1	54.8:1	64.4:1
Child : Total Classroom Employees	4.6:1	4.9:1	4.9:1

Source: 2010 Market Rate Survey

Education Level

Approximately 64.6 percent of child care center employees and 55.0 percent of family home providers have educational experiences beyond the high school / GED level. Among family home providers, 39.9 percent have college degrees including: 6.5 percent with the Master's degree or higher, 5.4 percent with the Bachelor's degree, and 28 percent with the Associate's degree. Additionally, 54.8 percent have the Child Development Associate (CDA) certification. Many family home providers with the CDA also have college degrees. In 1998, 19 percent of family home providers had college

degrees, and 15.7 percent had the CDA.

Family home providers with OSSE/ECE contracts are more likely to have education beyond high school (75 percent) than are market rate providers (62.1 percent). Gold tier family home providers have the highest levels of education. (See Table 9)

Education credentials for child care center employees are shown in Table 8 and Table 9. Approximately 53.1 percent of administrators, 50.0 percent of administrator/teachers, and 39.6 percent of teachers have a Bachelor’s or higher degree. An additional 10 percent of administrators, 34 percent of administrator/teachers and 25.1 percent of teachers have an Associate’s degree. While there are significant gains in the percentage of teachers with college degrees, there is a decline in the percentage of administrators with college degrees.

TABLE 8
EDUCATION LEVEL OF CHILD CARE CENTER EMPLOYEES (2010)

POSITION	MASTERS OR HIGHER (%)	BACHELORS (%)	ASSOCIATES (%)	CDA (%)
Administrator <i>n=304</i>	22.7%	30.4%	10.0%	24.0%
Administrator/ Teacher <i>n=109</i>	11.0%	39.0%	34.0%	43.0%
Teacher <i>n=1197</i>	7.9%	31.7%	25.1%	67.0%
Assistant Teacher <i>n=923</i>	.4%	7.0%	13.0%	41.0%
Classroom Aide <i>n=183</i>	0.0%	4.0%	6.0%	21.0%
Other <i>n=107</i>	3.0%	14.0%	2.0%	4.0%
Total <i>n=2,823</i>	6.0%	21.0%	18.0%	47.0%

Source: 2010 Market Rate Survey

There are significant differences in the education credentials of both teachers and total classroom personnel employed by the center groups. Teachers at market rate child care centers are much more likely to have a bachelor’s degree or higher (53.1 percent) than are teachers at OSSE/ECE contract child care centers (31.3 percent). Conversely, teachers at OSSE/ECE contract child care centers are more likely to have a CDA than are teachers at market rate child care centers (72.8 percent versus 56.9 percent, respectively). Teachers with college degrees may have the CDA credential also.

TABLE 9

DISTRIBUTION OF TEACHER CREDENTIALS BY TIER LEVEL

POSITION	MARKET RATE (%)	GOLD TIER (%)	SILVER TIER (%)	BRONZE TIER (%)
Administrator/Teacher	n=34	n=15	n=17	n=43
<i>Bachelor's degree+</i>	70.6%	13.3%	52.9%	44.2%
<i>Associates degree</i>	14.7%	60.0%	23.5%	14.0%
<i>CDA</i>	47.1%	33.3%	29.4%	48.8%
Teacher	n=450	n=363	n=139	n=245
<i>Bachelor's degree+</i>	53.1%	32.0%	33.10%	29.4%
<i>Associates degree</i>	28.7%	28.1%	16.5%	18.8%
<i>CDA</i>	56.9%	75.5%	71.2%	69.8%
Total Teachers	n=484	n=378	n=156	n=288
<i>Bachelor's degree+</i>	54.3%	31.2%	35.3%	31.6%
<i>Associates degree</i>	27.7%	29.4%	17.3%	18.1%
<i>CDA</i>	56.2%	73.8%	66.7%	66.7%
Family Home Provider	n=29	n=17	n=10	n=37
<i>Bachelor's degree+</i>	17.2%	17.6%	<1.0%	8.1%
<i>Associates degree</i>	27.6%	41.2%	30.0%	21.6%
<i>CDA</i>	27.6%	82.4%	80.0%	56.8%

Source: 2010 Market Rate Survey

Hours of Training

The average annual clock hours of training for family home providers has continued to decline. The median annual hours of training decreased by more than 40 percent and the percentage of providers reporting zero hours of training nearly doubled in the past two years. Clock hours of training include both on-the-job training and training during work and non-work hours.

As shown in Table 10, the average annual clock hours of training for center-based employees increased in 2010. Average annual training hours range from a low of 6.8 hours for classroom aides to a high of 33.6 hours for teachers with a BA degree or higher. The smallest declines in average training hours occur for teachers with the CDA and assistant teachers. The largest increases in average training hours occur for teachers with a BA or higher degree and administrators.

TABLE 10
AVERAGE ANNUAL HOURS OF TRAINING
BY PROVIDER TYPE AND EMPLOYEES (2008 AND 2010)

EMPLOYEE	MEDIAN ANNUAL HOURS OF TRAINING		MEAN ANNUAL HOURS OF TRAINING		% WITH "0" ANNUAL HOURS OF TRAINING		
	2008	2010	2008	2010	1998	2008	2010
Family Home Provider	32.0	18.0	50.3	33.3	36.7%	11.6%	22.6%
Administrator	8.0	15.0	21.2	29.9	16.5%	43.7%	42.5%
Admin. / Teacher	0.0	0.0	17.2	15.0	na	59.6%	61.3%
Teacher w BA+	0.0	18.0	18.2	33.6	13.9%	51.6%	37.7%
Teacher w CDA	18.0	18.0	31.3	31.6	16.7%	37.3%	29.7%
Assistant Teacher	6.5	17.0	25.7	25.2	7.6%	46.5%	41.5%
Classroom Aide	0.0	0.0	8.1	6.8	6.8%	72.9%	79.2%
Total Child Care Center Provider	90	97.0	122.5	144.3	8.9%	12.0%	9.9%

Source: 1998, 2008, and 2010 Market Rate and Capacity Utilization Surveys

A substantial number of center-based personnel participated in no training activities in both 2008 and 2010. However, 90.1 percent of all centers provided training for some categories of employees in 2010. Center providers reporting zero hours of training range from a high of 79.2 percent of classroom aides to a low of 29.7 percent for teachers with the CDA. While the percentage of family home providers with zero hours of training decreased by more than two-thirds between 1998 and 2008, it doubled between 2008 and 2010. The percentage of center-based employees not engaged in training for professional development declined between 2008 and 2010.

Almost all directors (93.9 percent) are aware of employee training activities. While most employers (86.8 percent) pay at least some of the cost of employee training, both employers and employees make liberal use of free training opportunities offered largely through the District of Columbia government.

Child care center providers were asked about obstacles they face with regard to participation in training activities. The obstacles to employee participation in training are identified by rank order below:

1. No funds for substitutes - 34.0 percent
2. Can't afford to participate - 32.0 percent
3. Training is not accessible - 28.3 percent
4. Staff is not interested - 20.3 percent
5. Training is too elementary - 19.8 percent
6. Nonpaid training time - 19.3 percent

Compensation

Center providers were asked to give salary information for each employee category. Centers were also asked to provide the number of hours worked per week and the number of weeks worked per year for each category of employees. These figures were used to compute adjusted salary figures. For example, two employees with the same annual salary rate may have different hourly rates if their number of hours worked per week (and/or number of weeks worked per year) differs.

Where annual salaries were given, hourly rates were computed by dividing the annual rate by the product of the hours worked per week multiplied by the number of weeks worked per year. Where hourly salaries were given, the annual salaries were computed by multiplying the hourly rate by the number of hours worked per week and the number of weeks worked per year.

The mean beginning salary for a teacher with a Bachelor's degree is \$31,803 per year, or \$16.88 per hour. The median annual salary is \$30,000 (or \$15.00 per hour). The comparable salaries for a teacher with the CDA certification are \$25,272 per year (\$13.44 per hour) for the mean and \$24,960 per year (\$12.55 per hour) for the median. The mean salary shows the average salary earned based on the number of employees in that group. The median salary is that point at which one-half of the employees in that group earn more and one-half earn less. (See Table 11)

Salaries increased for all positions except teachers with a bachelor's degree or higher, whose mean and median salaries declined by 17.2 percent and 3.8 percent, respectively. This drastic decline in salary for this teacher position was largely fueled by a 21.4 percent decrease among market rate providers. Still, market rate provider salaries for teachers with a bachelor's degree or higher are 19 percent more than are salaries paid by OSSE/ECE contract child care center providers. Salaries for this position declined with all child care center provider groups except silver tier providers. (See Table 12)

TABLE 11
2010 AVERAGE BEGINNING SALARIES BY CENTER EMPLOYEE GROUP

POSITION	ANNUAL		HOURLY	
	Mean	Median	Mean	Median
Administrator <i>n=304</i>	\$50,537	\$40,000	\$26.97	\$19.23
Administrator / Teacher <i>n=109</i>	\$37,080	\$35,000	\$18.83	\$16.83
Teacher with Bachelor's or higher <i>n=473</i>	\$31,803	\$30,000	\$16.88	\$15.00
Teacher with CDA <i>n=785</i>	\$25,272	\$24,960	\$13.44	\$12.55
Assistant Teacher <i>n=659</i>	\$20,818	\$19,760	\$10.68	\$10.00
Classroom Aide <i>n=179</i>	\$18,109	\$18,360	\$9.81	\$9.50

Source: 2010 Market Rate Survey

Providers were also asked about the policies for adjusting salaries. Approximately 56.6 percent of providers give merit-based raises, 31.6 percent give cost of living raises, and 24.1 percent give other bases for raises. Other bases cited include availability of funds, education, years on the job, and regional salary levels.

While market rate providers continue to be more likely to adjust salaries based on merit (60.2 percent) than are OSSE/ECE contract providers (54.7 percent), the gap has narrowed since 2008 (62.8 versus 45.3). OSSE/ECE contract providers are more likely than market rate providers to base salary adjustments on the cost of living, availability of funds, or other reasons.

TABLE 12
2010 ANNUAL BEGINNING SALARIES
BY SELECTED POSITION AND TIER LEVEL

POSITION	MARKET RATE (N=78)	GOLD TIER (N=48)	SILVER TIER (N=30)	BRONZE TIER (N=65)
Administrator Only				
Mean Salary	\$71,151	\$46,851	\$40,566	\$37,555
Median Salary	\$40,000	\$39,000	\$38,000	\$36,000
Administrator/Teacher				
Mean Salary	\$39,720	\$40,266	\$37,122	\$34,532
Median Salary	\$37,000	\$35,000	\$30,600	\$35,000
Teacher w/Bachelor's+				
Mean Salary	\$35,674	\$29,930	\$31,195	\$29,310
Median Salary	\$33,280	\$30,000	\$29,210	\$27,040
Teacher w/CDA				
Mean Salary	\$27,561	\$25,076	\$24,711	\$24,118
Median Salary	\$28,225	\$24,490	\$24,000	\$22,440
Assistant Teacher				
Mean Salary	\$24,753	\$19,298	\$18,121	\$17,942
Median Salary	\$24,500	\$19,760	\$17,840	\$17,680

Source: 2010 Market Rate Survey

Benefits

Table 13 reports benefits received by family home providers and employees of child care centers. While most centers (78.8 percent) do not offer benefits for part-time employees, the percentage with part-time employees participating in benefits programs more than doubled since 2008. Still, there continues to be a decline in the percentage of centers offering benefits to all employees.

Benefits offered decreased in all categories since 2008 and the percentage of centers with no benefits increased substantially. While there is an increase in the percentage of family home providers with disability benefits, there are declines in the percentages of those with health, life insurance, retirement and paid leave benefits.

Most other benefits provided include transportation/parking fees, tuition reimbursement, child care discounts, personal leave, and dental and vision insurance.

TABLE 13

TYPES OF PROVIDER BENEFITS

TYPE OF BENEFIT	FAMILY HOME PROVIDERS		CENTER PROVIDERS	
	2008	2010	2008	2010
Health Insurance	89.7 %	83.1%	72.9 %	67.5%
Life Insurance	77.4 %	50.0%	52.3 %	46.7%
Retirement	30.8 %	26.7%	51.9 %	45.3%
Disability	23.3%	27.8%	42.2%	40.1%
Paid Sick Leave	14.4 %	5.6%	83.3%	69.8%
Paid Vacation	21.9 %	4.4%	86.0%	69.3%
Other	0.0%	11.1%	12.8%	11.9%
No Benefits	4.1 %	8.9%	1.6%	7.5%

Source: 2010 Market Rate Survey

Family home providers were asked to identify the source of their benefits. Most providers (60.9 percent) indicated that they are the source of their benefits and 21.3 percent stated that their spouse is the source.

Family home providers paid a mean annual cost of \$1,081 and a median of \$500 for out-of-pocket medical expenses for the last year. Approximately 78.2 percent made no visits to the emergency room for their own care, and 94.5 percent made no emergency room visits for their own child’s care. Nearly 3.9 percent made four or more visits to emergency rooms during the past year. Most family home providers (61.5 percent) would continue to offer child care services if health insurance were not available to them.

On average, 72.7 percent of child care center employees participate in the benefit plans offered. An increasing percentage of centers (44.3 percent versus 35.6 percent in 2008) have 100 percent employee participation and 2.9 percent have no employee participation in available benefit plans. Employee benefit programs average 22.5 percent of salaries.

Revenue Received

Rates were computed for each age category, for both full-time and part-time care, and annualized based on the reported hours per day, days per week, and months per year of care provided. Then, the annualized rate was multiplied by the number of enrolled slots for each age category. The per child gross revenue estimates were derived by dividing annual revenue by total enrollment at each center. Revenue estimates are based on enrollment charges and do not include fees, grants or non-cash benefits. Additionally, revenue estimates assume stable enrollment levels for the year.

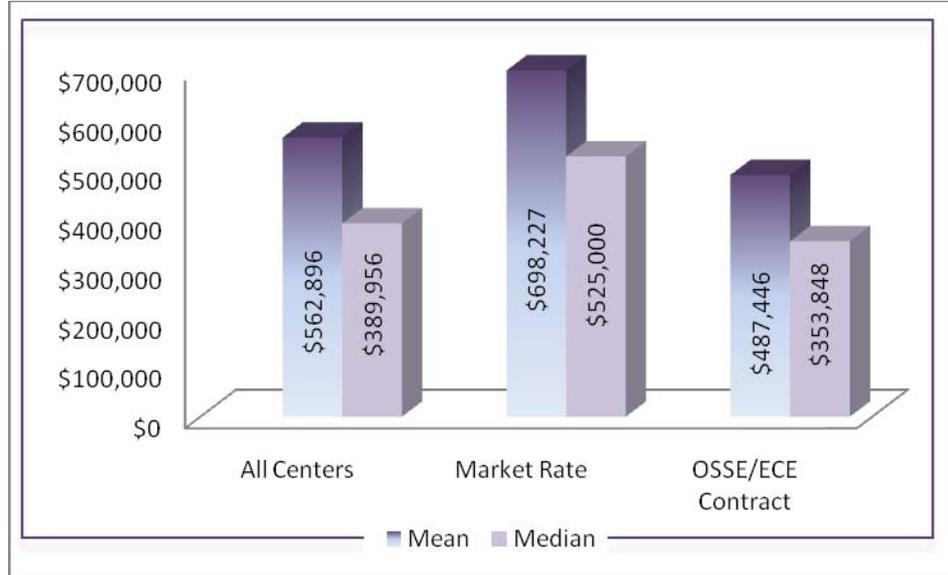
Gross revenue received does not represent annual salary or annual net income received since operating expenses have not been deducted. For family home providers, the gross annual enrollment revenue has a mean average of \$38,728 and a median of \$36,242. Twenty-five percent of family home providers received less than \$25,007 in gross receipts. Market rate providers received an average of \$40,661 and OSSE/ECE contract providers received average gross revenue of \$37,919. While, overall, market rate family home providers' gross receipts are 7.2 percent higher than receipts of OSSE/ECE contract providers, gold tier providers actually have the highest average gross receipts at \$46,530. This difference is largely attributable to higher average enrollment figures (4.4 versus 3.3 for market rate).

Figure 3 illustrates the gross annual enrollment revenue received by center providers, Figure 4 provides revenue figures by tier level, and Figure 5 shows the gross annual enrollment revenue per child. While the difference between gross revenue received by market rate centers and OSSE/ECE contract centers continues to be substantial, the gap has narrowed. In a comparison of market rate centers and gold tier centers, adjusted for enrollment levels, the gap narrows to 3.6 percent.

Gross revenue received by market rate centers is 43.2 percent higher than revenue received by OSSE/ECE contract providers. However, market rate centers have an average enrollment of 57.1 children versus an average of 54.7 children at OSSE/ECE contract centers. When adjusted for enrollment differences, revenues are just 22.5 percent (or \$118,973) higher at market rate centers.

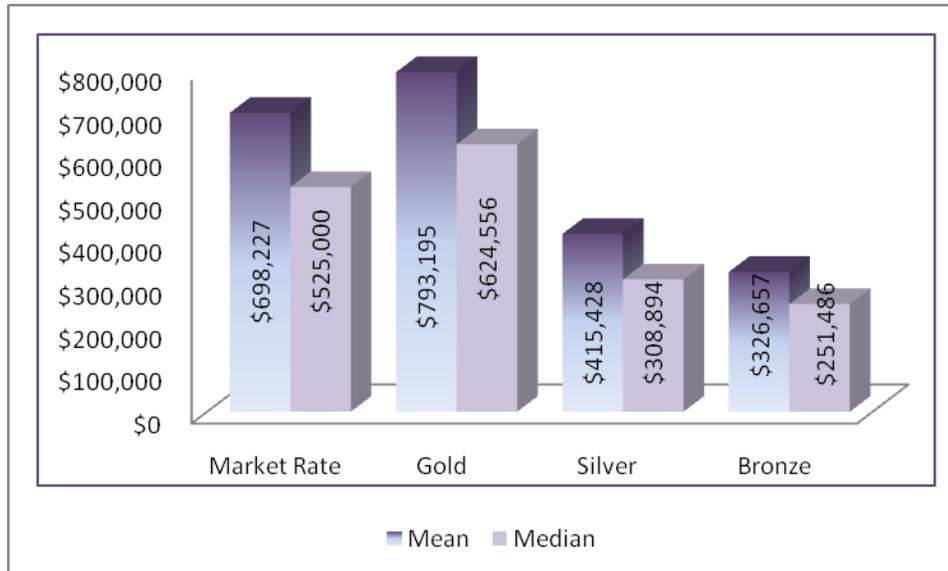
Gold tier centers have substantially higher enrollment levels than either market rate or other tier level centers. Mean enrollment is 73.9 children at gold tier centers, 57.1 children at market rate centers, 45.1 at silver tier centers, and 43.7 at bronze tier centers.

FIGURE 3
GROSS ANNUAL CENTER ENROLLMENT REVENUE
BY CONTRACT STATUS (2010)



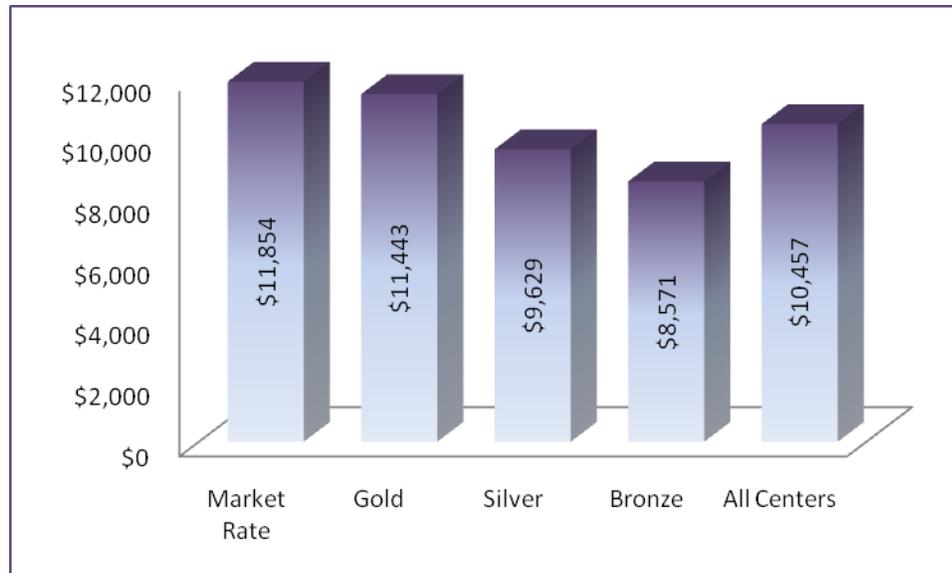
Source: 2010 Market Rate Survey

FIGURE 4
GROSS ANNUAL CENTER ENROLLMENT REVENUE
BY TIER LEVEL (2010)



Source: 2010 Market Rate Survey

FIGURE 5
GROSS ANNUAL CENTER ENROLLMENT REVENUE PER CHILD (2010)



Source: 2010 Market Rate Survey

Provider Revenue Sources

The percent of providers charging other fees is delineated in Table 14. The percent of providers receiving funds from other revenue sources is identified in Table 15.

More than one-third of family home providers and three-fourths child care center providers currently charge registration fees for children enrolling in their programs. While the percentage of family home providers charging registration fees remained the same, center providers charging registration fees increased by 50 percent. Child care center providers are more likely to have fees for meals, transportation, and special activities/programs. Child care center providers are more likely to have fees for meals, transportation, and special activities/programs. Other fees include primarily late fees, late payment fees, and bounced check fees.

Both family home providers (54.8 percent) and child care center providers (73.1 percent) charge fees for picking up children late. Fifty-eight (58) percent of family home providers and 61.4 percent of child care center providers charging fees, charge by the minute. Approximately 15.7 percent of homes and 15.9 percent of centers grant a grace period (typically 15 minutes) before requiring additional payment.

TABLE 14
PERCENT OF PROVIDERS CHARGING ADDITIONAL FEES (2010)

TYPE OF FEE	% FAMILY HOME PROVIDERS	% CHILD CARE CENTER PROVIDERS
Registration	33.3%	76.8%
Supplies	4.1%	17.6%
Activities/Programs	1.1%	22.8%
Meals	0.0%	10.8%
Liability Insurance	0.0%	2.3%
Transportation	0.0%	1.5%
Other Fees	54.8%	73.1%

Source: 2010 Market Rate Survey

While 62.4 percent of family home providers and 76.9 percent of child care center providers receive revenue directly from parent charges, child care center providers continue to report a variety of other revenue sources. Fund raising activities generate revenue for 23.6 percent of these providers, while 11.3 to 27.4 percent receive revenue from private, federal and/or District grants. More than one-third of all family home providers and 45.8 percent of all child care center providers receive revenues from agency reimbursements.

TABLE 15
OTHER REVENUE SOURCES (2010)

REVENUE SOURCE	% FAMILY HOME PROVIDERS	% CHILD CARE CENTER PROVIDERS
Fund Raising	3.2%	23.6%
Agency Reimbursements	36.6%	45.8%
Federal Government Grants	2.2%	17.9%
District Government Grants	11.8%	27.4%
Private Grants	0.0%	11.3%
Other Revenue Source	0.0%	5.2%

Source: 2010 Market Rate Survey

While less than two percent of family home providers reported receiving non-cash benefits in the form of rent, utilities and/or equipment, 7.5 percent receive food contributions. Approximately 3.3 percent of centers receive non-cash rent, 3.3 percent receive non-cash utilities, 6.6 percent receive food contributions, 4.7 percent receive equipment contributions, and 8.4 percent reported receiving other non-cash benefits. Other non-cash benefits include items and/or services donated by parents and/or other organizations. Nearly 80 percent of child care center providers and 98 percent of family home providers receive no non-cash benefits.

The percentage of family home providers receiving food contribution decreased, but the percentage of child care center providers receiving food contributions increased. Non-cash contributions for rent, utilities and equipment decreased for child care center providers.

Professional Accreditation Status

Approximately 38.5 percent of child care center providers and 24.2 percent of family home providers report that they have received accreditation from a professional accreditation organization. However, while 6.6 percent of family home providers cite the National Association for Education of Young Children (NAEYC) as their accrediting organization, NAEYC does not accredit facilities where the operator lives.

An additional 30.7 percent of child care center providers and 24.8 percent of family home providers are currently engaged in some step of the accreditation process. (See Table 16)

The most frequently cited accreditation organization for centers is the National Association for the Education of Young Children (NAEYC) at 31.6 percent and for Family home providers is the National Association for Family Child Care (NAFCC) at 14.3 percent. Other accreditation organizations cited are: the Council on Accreditation (COA); the National After-School Association; the American International Montessori Society (AIMS); the International Christian Accrediting Association; the National Association of Independent Schools (NAIS); the Association of Independents Schools of Greater Washington (AISGW); the Association of Independent Maryland Schools; and the Partnership for Jewish Life and Learning.

During the past decade, there has been a significant increase in the percentage of both family home providers and child care center providers accredited and/or seeking accreditation. Market rate child care center providers are more likely to be accredited by some accrediting organization than are OSSE/ECE child care center providers (42 percent versus 30.1 percent, respectively); however, OSSE/ECE contract child care center providers are a little more likely to be accredited by NAEYC (32.4 percent versus 30.1 percent, respectively). OSSE/ECE contract family home providers are more likely to be accredited than their market rate peers.

TABLE 16
PROFESSIONAL ACCREDITATION STATUS (2008 AND 2010)

STATUS	FAMILY HOME PROVIDERS		CHILD CARE CENTER PROVIDERS	
	2008	2010	2008	2010
Accredited	24.7 %*	24.2%**	45.0 %	38.5%
Have filed application for accreditation	1.4 %	7.6%	13.2 %	6.6%
Preparing to apply for accreditation	7.5 %	17.2%	13.6 %	24.1%

Source: 2008 and 2010 Market Rate Surveys

*Note: An additional 13.7 percent cited NAEYC accreditation; however, NAEYC does not accredit facilities where the operator lives. **Includes 6.6 percent citing NAEYC accreditation.

Providers not currently accredited were asked what they would need to become accredited. The top two areas of assistance needed cited by providers are additional information and a mentor. Other types of assistance needed include staff training, scholarships, and time for applying. Approximately 23.7 percent of family home providers and 10.4 percent of child care center providers do not intend to apply for accreditation. (See Table 17)

TABLE 17
ASSISTANCE NEEDED FOR ACCREDITATION (2010)

AREA OF NEED	FAMILY HOME PROVIDERS	CHILD CARE CENTER PROVIDERS
Additional information	39.8%	27.4%
Mentor	14.0%	20.3%
Assistance with fees	22.6%	21.2%
Don't Intend to Apply	23.7%	10.4%

Source: 2010 Market Rate Survey

Tenure

Table 18 shows the median and mean years of service for child care providers by position for total providers, market rate providers, and OSSE/ECE contract providers. In 2008, staff at OSSE/ECE contract child care centers had higher average years of service than their peers at market rate child care centers; however, in 2010 staff at market rate child care centers have more average years of service.

OSSE/ECE contract family home providers have more average years of service than do their market rate peers.

TABLE 18
AVERAGE TENURE OF CHILD CARE WORKFORCE BY POSITION (2010)

POSITION	TOTAL PROVIDERS	MARKET RATE	OSSE/ECE CONTRACT
Family Home Provider			
Median Years of Service	11.0	9.0	12.0
Mean Years of Service	13.9	12.2	14.6
Administrator Only			
Median Years of Service	5.0	7.5	5.0
Mean Years of Service	8.9	9.5	8.7
Administrator/Teacher			
Median Years of Service	5.0	5.0	5.0
Mean Years of Service	9.3	9.8	9.0
Teacher			
Median Years of Service	5.0	6.8	5.0
Mean Years of Service	6.9	8.4	6.1
Assistant Teacher			
Median Years of Service	4.0	5.0	3.0
Mean Years of Service	5.2	6.6	4.4
Classroom Aide			
Median Years of Service	2.0	5.0	2.0
Mean Years of Service	3.9	6.1	3.3

Source: 2010 Market Rate Survey

3.2 MARKET RATES

Child care rates were computed for seven age groups:

- Infant
- Age 1 year
- Age 2 years
- Age 3 years
- Age 4 years
- Age 5 years
- Ages 6-12 years
- Ages 13-18 years

In order for a slot to be included in the rate analysis there had to be children enrolled in the age category and a rate had to be given by the provider. The 75th percentile is used to calculate rates. (Note: A comparison of the 75th percentile, median, mean, and standard deviation for market rate providers can be found in Appendix C.) Rates are based on the actual number of hours and days that the typical child is in care with each provider.

Market rate child care providers are licensed child development centers and/or licensed child development homes that have no contract or provider agreement with the Division of Early Childhood Education to provide services under the Child Care Subsidy Program.

OSSE/ECE contract child care providers are licensed child development centers and/or licensed child development homes that have a contract or provider agreement with the Division of Early Childhood Education to provide care for eligible children under the Child Care Subsidy Program; however, all children enrolled at these facilities are not necessarily participants in the subsidy program.

Total Providers includes both market rate providers and OSSE/ECE contract providers.

Family Home Provider respondents include:

- 64 OSSE/ECE contract child development homes, with 369 licensed slots
- 29 market rate child development homes, with 149 licensed slots

Child Care Center Providers includes

- 143 OSSE/ECE contract child development centers, with 9,620 licensed slots
- 78 market rate child development centers, with 4,962 licensed slots

Market rate child care providers were 31.1 percent of family home providers and 33.3 percent of child care center providers responding to the survey in 2008. This distribution remained fairly consistent in 2010, with 31.2 percent of family home providers and 35.3 percent of child care center providers responding to the survey being classified as market rate child care providers.

Family Home Provider Rates

Infants

Child care rates are identified for market rate providers in Table 19, providers with OSSE/ECE contracts/provider agreements in Table 20, and the total pool of family home providers in Table 21. Approximately 36.7 percent of all family child care infant enrollment is with market rate providers. Seventy-one (71) percent of infant enrollment in 1998 and 29.1 percent in 2008 was with market rate providers.

The full-time daily market rate for infants is \$46.00 (Table 19). The market rate declined from \$55.00 per day in 2008. The rate charged by providers with OSSE/ECE contracts or provider agreements is \$40.50 per day (Table 20). The total pool of family home providers has a rate of \$45.00 per day (Table 21).

Hourly rates were computed by dividing the daily rate by the actual hours per day that the typical child is enrolled with the provider. Therefore, the hourly rate may differ for providers with the same daily rate if one provider operates 10 hours per day while the other operates 12 hours per day.

Weekly, monthly, and annual rates are also provided for each age category.

Toddlers

The full-time daily market rate for children age 1-year is \$47.50 (Table 19). The market rate declined from \$50.00 per day in 2008. Approximately 23.3 percent of children in this age group are with market rate providers. Providers with OSSE/ECE contracts or provider agreements have a daily rate of \$36.00 (Table 20). The total pool of Family home providers has a rate of \$37.50 per day (Table 21).

The full-time daily market rate for children age 2-years is \$50.00 (Table 19). Providers with OSSE/ECE contracts or provider agreements have a daily rate of \$34.25 (Table 20). As Table 21 shows, the total pool of family care providers has a rate of \$35.00. More than twenty-eight (28.3) percent of children age 2-years are with market rate providers. In 1998, more than 76 percent of toddlers (ages 1 and 2 years) were enrolled with market

rate providers. The corresponding figures for 2006 and 2008 are 24.4 percent and 26.1 percent, respectively.

Preschool

The full-time market rate for children age 3-years is \$62.50 per day (Table 19). The full-time rate for providers with OSSE/ECE contracts or provider agreements is \$33.00 (Table 20). The rate for the total pool of providers is \$35.00 (Table 21). Approximately 20.8 percent of 3-year-olds are enrolled with market rate providers. In 1998, 77.2 percent of preschoolers in family home care were with market rate providers. The corresponding numbers are 35.4 percent in 2006 and 21.7 percent in 2008, respectively.

The full-time market rate for children age 4-years is \$55.25, while the rate for OSSE/ECE contract providers is \$31.00 and for the total pool of providers is \$31.50 per day. This represents a decline in rates for this age group in all categories. There are few 4-year-olds enrolled full-time in family home provider care. Therefore, the market rate is based on 4 reported slots, while the contract rate is based on 16 reported slots.

School-Age

The full-time market rate for school-age children is \$52.50 per day (Table 19). Providers with OSSE/ECE contracts or provider agreements have a rate of \$25.80 per day (Table 20). The rate for the total pool of providers is \$27.25 per day (Table 21).

The full-time rate for school-age children is based on rates reported for full-time care when school is closed. Most children (86.8 percent) are with OSSE/ECE contract providers. In 2008, 91.7 percent of school-age children were with OSSE/ECE contract providers.

Few children in any of the age categories are enrolled part-time with family home providers.

TABLE 19
FULL-TIME RATES
FOR FAMILY HOME MARKET RATE PROVIDERS (2010)

SERVICE GROUP	HOURLY*	DAY	WEEK	MONTH	YEAR
Infant n=22	\$4.60	\$46.00	\$230.00	\$995.90	\$11,951
Age 1 n=20	\$4.75	\$47.50	\$237.50	\$1,028.38	\$12,341
Age 2 n=32	\$5.00	\$50.00	\$250.00	\$1,082.50	\$12,990
Age 3 n=15	\$7.99	\$62.50	\$312.00	\$1,353.13	\$15,566
Age 4 n=4	\$7.62	\$55.25	\$276.25	\$1,196.16	\$13,347
School-age n=9	-	\$52.50	\$262.50	-	-

Source: 2010 Market Rate Survey

Note: Rates are at the 75th percentile. *Hourly rates are not standardized; they are computed based on the actual number of hours the typical child is in care with each provider.

School-age rates are the full-time rates charged when school is closed.

n= number of enrolled slots

TABLE 20
FULL - TIME RATES
FOR FAMILY HOME OSSE/ECE CONTRACT PROVIDERS (2010)

SERVICE GROUP	HOURLY*	DAY	WEEK	MONTH	YEAR
Infant n=38	\$4.38	\$40.50	\$202.50	\$876.83	\$10,522
Age 1 n=66	\$4.38	\$36.00	\$180.00	\$779.40	\$9,353
Age 2 n=71	\$3.33	\$34.25	\$173.75	\$752.34	\$8,709
Age 3 n=57	\$3.50	\$33.00	\$167.50	\$725.28	\$8,573
Age 4 n=16	\$3.88	\$31.00	\$155.00	\$671.15	\$8,054
School-age n=46	-	\$25.80	\$129.00	-	-

Source: 2010 Market Rate Survey

Note: Rates are at the 75th percentile. *Hourly rates are not standardized; they are computed based on the actual number of hours the typical child is in care with each provider.

n= number of enrolled slots

Table 21
FULL-TIME RATES
FOR TOTAL FAMILY HOME PROVIDERS (2010)

SERVICE GROUP	HOURLY*	DAY	WEEK	MONTH	YEAR
Infant n=60	\$4.50	\$45.00	\$225.00	\$974.25	\$11,691
Age 1 n=86	\$4.41	\$37.50	\$188.75	\$817.29	\$9,807
Age 2 n=113	\$3.88	\$35.00	\$175.00	\$757.75	\$9,093
Age 3 n=72	\$3.88	\$35.00	\$175.00	\$757.75	\$9,093
Age 4 n=20	\$3.88	\$31.50	\$155.00	\$671.15	\$8,054
School-age n=53	-	\$27.25	\$136.25	-	-

Source: 2010 Market Rate Survey

Note: Rates are at the 75th percentile. *Hourly rates are not standardized; they are computed based on the actual number of hours the typical child is in care with each provider.

n= number of enrolled slots

Child Care Center Provider Full-time Rates

Infants

Child care center rates are identified for market rate providers in Table 22, providers with OSSE/ECE contracts/provider agreements in Table 23, and the total pool of child care center providers in Table 24. Approximately 35.4 percent of all enrolled infant slots are with market rate providers; 64.4 percent are with OSSE/ECE contract providers. Fifty-eight (58) percent of infant enrollment in 1998 and 34.5 percent in 2008 was with market rate providers.

The daily full-time market rate for infants is \$75.29 (Table 22). Providers with OSSE/ECE contracts or provider agreements have a daily rate of \$60.00 (Table 23). The OSSE/ECE full-time rates are significantly below the market rates for infant care.

The total pool of center-based providers has a rate of \$70.40 per day (Table 24).

Toddlers

The daily full-time market rate for children age 1-year is \$72.47 (Table 22). Approximately 40.5 percent of 1-year-olds are with market rate providers; 59.5 percent

are with OSSE/ECE contract providers. Providers with OSSE/ECE contracts or provider agreements have a daily rate of \$55.61 (Table 23). The total pool of child care center providers has a rate of \$67.44 per day (Table 24). Just more than twenty-eight (28.2) percent of children age 2-years in full-time care are with market rate providers, while 71.8 percent are with OSSE/ECE contract providers. In 1998, 60 percent of toddlers were enrolled with market rate providers. The corresponding numbers are 32.2 percent in 2008 and 35.7 percent in 2010, respectively.

The full-time daily market rate for the children age 2-years is \$64.20 (Table 22). Providers with OSSE/ECE contracts or provider agreements have a rate of \$51.00 per day (Table 23). The total pool of center-based providers has a daily rate of \$58.66 (Table 24).

Preschool

The full-time market rate for children age 3-years is \$57.78 per day (Table 22) a decrease from \$61.89 in 2008. The rate charged by providers with OSSE/ECE contracts or provider agreements is \$46.19 (Table 23). The rate for the total pool of providers is \$53.49 per day (Table 24). Approximately 59.2 percent of the enrolled slots for 3-year-olds are with OSSE/ECE contract providers, while 40.8 percent are with market rate providers. Forty-nine percent of these slots were with market rate providers in 2008.

The full-time market rate for children age 4-years is \$57.60 per day (Table 22). The rate charged by providers with OSSE/ECE contracts or provider agreements is \$50.00 (Table 23). The rate for the total pool of providers is \$54.04 per day (Table 24). Approximately 59.3 percent of the enrolled slots for 4-year-olds are with OSSE/ECE contract providers, while 40.7 percent are with market rate providers. In 1998, 25 percent of preschool slots were with market rate providers. The corresponding figures are 47.8 percent in 2008 and 40.8 percent in 2010, respectively.

School-Age

Full-time rates for school-age children are computed based on the rate charged for full-time care when school is closed. The full-time daily market rate for school-age children is \$57.30 per day (Table 22). Providers with OSSE/ECE contracts or provider agreements have a rate of \$45.00 per day (Table 23). The rate for the total pool of providers is \$54.00 per day (Table 24). Approximately seventeen percent (17.2) of school-age children in full-time care with child care providers when school is closed are with market rate providers and 82.9 percent are with OSSE/ECE providers. In 1998, the distribution was somewhat different, with 24.4 percent enrolled with market rate providers.

TABLE 22
FULL-TIME RATES
FOR CHILD CARE CENTER MARKET RATE PROVIDERS (2010)

SERVICE GROUP	HOURLY*	DAY	WEEK	MONTH	YEAR
Full-Time					
Infant <i>n</i> =416	\$8.87	\$75.29	\$376.44	\$1,630	\$19,560
Age 1 <i>n</i> =524	\$8.49	\$72.47	\$354.50	\$1,535	\$18,420
Age 2 <i>n</i> =565	\$7.83	\$64.20	\$321.02	\$1,390	\$16,680
Age 3 <i>n</i> =757	\$7.22	\$57.78	\$288.91	\$1,251	\$15,012
Age 4 <i>n</i> =602	\$7.01	57.60	\$287.99	\$1,247	\$14,964
School-age <i>n</i> =267	-	57.30	\$286.50	-	-

Source: 2010 Market Rate Survey

Note: Rates are at the 75th percentile. *Hourly rates are not standardized. They are computed based on the actual number of hours the typical child is in care with each provider. *n*= number of enrolled slots

TABLE 23
FULL-TIME RATES
FOR CHILD CARE CENTER OSSE/ECE CONTRACT PROVIDERS (2010)

SERVICE GROUP	HOURLY*	DAY	WEEK	MONTH	YEAR
Full-Time					
Infant <i>n</i> =753	\$6.88	\$60.00	\$300.00	\$1,299	\$15,588
Age 1 <i>n</i> =784	\$6.87	\$55.61	\$282.00	\$1,221	\$14,653
Age 2 <i>n</i> =1442	\$5.76	\$51.00	\$255.00	\$1,104	\$13,250
Age 3 <i>n</i> =1406	\$5.04	\$46.19	\$230.95	\$1,000	\$12,000
Age 4 <i>n</i> =1055	\$5.43	\$50.00	\$250.00	\$1,082	\$12,925
School-age <i>n</i> =1605	-	\$45.00	\$225.00	-	-

Source: 2010 Market Rate Survey

Rates are at the 75th percentile. *Hourly rates are not standardized; they are computed based on the actual number of hours the typical child is in care with each provider. *n*= number of enrolled slots

Table 24
FULL-TIME RATES
FOR TOTAL CHILD CARE CENTER PROVIDERS (2010)

SERVICE GROUP	HOURLY*	DAY	WEEK	MONTH	YEAR
Full-Time					
Infant <i>n=1169</i>	\$7.95	\$70.40	\$350.00	\$1,515	\$18,186
Age 1 <i>n=1308</i>	\$7.78	\$67.44	\$337.18	\$1,460	\$17,520
Age 2 <i>n=2007</i>	\$6.36	\$58.66	\$293.30	\$1,270	\$15,172
Age 3 <i>n=2163</i>	\$6.00	\$53.49	\$267.44	\$1,158	\$13,700
Age 4 <i>n=1657</i>	\$6.08	\$54.04	\$270.21	\$1,170	\$14,040
School-age <i>n=1552</i>	-	\$54.00	\$270.00	-	-

Source: 2010 Market Rate Survey

Note: Rates are at the 75th percentile. *Hourly rates are not standardized; they are computed based on the actual number of hours the typical child is in care with each provider. *n*= number of enrolled slots

Table 25 illustrates the comparative differences in daily rates for child care services between market rate child care providers and child care providers with an OSSE/ECE contract or provider agreement to provide services under the Child Care Subsidy Program, as well as differences between child care provider rates for 2008 and 2010.

Table 25
COMPARISON OF DAILY FULL-TIME RATES
FOR CHILD CARE SERVICES

FULL-TIME (35 HRS A WEEK OR MORE)	MARKET RATE PROVIDERS		OSSE/ECE CONTRACT PROVIDERS		TOTAL PROVIDERS	
	2008	2010	2008	2010	2008	2010
Family Home Provider	2008	2010	2008	2010	2008	2010
Infant	\$55.00	\$46.00	\$38.00	\$40.50	\$40.00	\$45.00
Age 1	\$50.00	\$47.50	\$35.75	\$36.00	\$35.00	\$37.50
Age 2	\$37.00	\$50.00	\$35.00	\$34.25	\$35.00	\$35.00
Age 3	\$36.00	\$62.50	\$30.00	\$33.00	\$35.00	\$35.00
Age 4	\$65.00	\$55.25	\$42.00	\$31.00	\$40.00	\$31.50
School-age	\$32.00	\$52.50	\$35.00	\$25.80	\$35.00	\$27.25
Center Provider	2008	2010	2008	2010	2008	2010
Infant	\$69.28	\$75.29	\$54.20	\$60.00	\$59.12	\$70.40
Age 1	\$66.05	\$72.47	\$51.60	\$55.61	\$59.00	\$67.44
Age 2	\$62.12	\$64.20	\$51.00	\$51.00	\$54.00	\$58.66
Age 3	\$61.89	\$57.78	\$45.00	\$46.19	\$50.00	\$53.49
Age 4	\$61.89	\$57.60	\$42.00	\$50.00	\$48.00	\$54.04
School-age	\$47.25	\$57.30	\$38.91	\$45.00	\$46.00	\$54.00

Source: 2010 Market Rate Survey
Note: Rates are at the 75th percentile

Child Care Center Part-time Rates

Approximately 19 percent of providers have children enrolled in care part-time. These providers were asked if they have a minimum number of hours required for part-time care. Overall, 23.7 percent of these child care center providers require a minimum number of hours. Among child care center providers with children enrolled part-time, 41 percent of market rate providers and just 8.3 percent of OSSE/ECE contract providers have such a policy.

Child care center providers with children enrolled in part-time care have a variety of policies for part-time child care. Some providers require a minimum number of days, some a minimum number of hours per day and some a minimum number of hours per week or per month. The part-time rates in Table 26 are based on the actual number of days per week and hours per day children are in care with each provider. Table 27 shows the median hours per day and days per week by age group for children in care part-time.

There are few infants (42) in part-time care. The market rate for infants in part-time care is \$127.30 per day or \$14.15 per hour. Providers with OSSE/ECE contracts or provider agreements have a part-time rate of \$41.25 per day or \$8.16 per hour. The rate for the total pool of child care center providers is \$102.39 per day or \$11.38. Infants are in part-time care a median of 9 hours per day and 2 days per week with market rate providers and a median of 6 hours per day and 5 days per week with OSSE/ECE contract providers.

Table 26
PART-TIME RATES

FOR CHILD CARE CENTER PROVIDERS (2010)

SERVICE GROUP	MARKET RATE		OSSE/ECE CONTRACT		TOTAL PROVIDERS	
	Hourly	Daily	Hourly	Daily	Hourly	Daily
Infant <i>n=42</i>	\$14.15	\$127.30	\$8.16	\$41.25	\$11.38	\$102.39
Age 1 <i>n=45</i>	\$10.31	\$92.76	\$7.63	\$38.75	\$7.63	\$39.38
Age 2 <i>n=188</i>	\$17.11	\$53.25	\$11.20	\$44.80	\$11.20	\$51.32
Age 3 <i>n=303</i>	\$12.32	\$36.95	\$6.30	\$25.20	\$12.32	\$36.95
Age 4 <i>n=281</i>	\$11.59	\$46.35	\$6.30	\$25.20	\$11.59	\$46.35

Source: 2010 Market Rate Survey

Note: Rates are at the 75th percentile. *Hourly rates are not standardized; they are computed based on the actual number of hours the typical child is in care with each provider. *n* = number of enrolled slots

Table 27
MEDIAN HOURS PER DAY AND DAYS PER WEEK CHILDREN ARE ENROLLED
PART-TIME IN CHILD CARE CENTERS (2010)

SERVICE GROUP	MARKET RATE		OSSE/ECE CONTRACT		TOTAL PROVIDERS	
	Hours	Days	Hours	Days	Hours	Days
Infant <i>n=42</i>	9	2	6	5	6	5
Age 1 <i>n=45</i>	6	4	6	5	6	5
Age 2 <i>n=188</i>	3	3	6	5	3	3
Age 3 <i>n=303</i>	3	5	4	5	3	5
Age 4 <i>n=281</i>	4	5	6	5	4	5

Source: 2010 Market Rate Survey

The part-time market rate for 1-year-olds is \$92.76 per day or \$10.31 per hour (Table 26). The rate charged by providers with OSSE/ECE contracts is \$38.75 per day or \$7.63 per hour. The part-time rate for 1-year olds for the total pool of providers is \$39.75 per day or \$7.63 per hour. Children age 1-year are in care a median of 6 hours per day and 4 days per week with market rate providers and 6 hours per day and 5 days per week with OSSE/ECE contract providers.

The part-time market rate for 2-year-olds is \$53.25 per day or \$17.11 per hour (Table 26). For providers with OSSE/ECE contracts or provider agreements, the part-time rate is \$44.80 per day or \$11.20 per hour. The part-time rate for the total pool of providers is \$51.32 per day or \$17.11 per hour. Children age 2-years are in care a median of 3 hours per day and 3 days per week with market rate providers and 6 hours per day and 5 days per week with OSSE/ECE contract providers.

The part-time market rate for children age 3-years is \$36.95 per day or \$12.32 per hour (Table 26). Approximately 74.7 percent of part-time slots for preschoolers are with market rate providers. The part-time rate charged by providers with OSSE/ECE contracts is \$25.20 per day or \$6.30 per hour. The part-time rate for the total pool of providers is \$36.95 per day or \$12.32 per hour. Three year-olds are in care a median of 3 hours per day and 4-year-olds are in care on average of 4 hours per day with market rate providers and 4 hours per day and 6 hours per day, respectively, with OSSE/ECE contract providers.

Rates for Child Care Providers Enrolling Children with Disabilities

Child care providers responding to the survey currently enroll 471 children with disabilities. Approximately 8.6 percent of family home providers and 22.2 percent of centers have children with disabilities currently enrolled. The rates charged at these facilities are not specifically for children with disabilities; they are the usual rates charged by providers for all children enrolled.

Rates for Nontraditional Hours of Care

Less than two (2) percent of child care center providers and 7.6 percent of family home providers reported different rates for nontraditional hours of care. Approximately 5.4 percent of family home providers have overnight rates, 3.2 percent have evening rates, 2.2 percent have weekend rates, and 2.2 percent have extended day rates. Their rates, however, were not provided by age category. Child care providers reporting nontraditional rates have varying categories of rates; therefore, an average rate could not be determined.

3.3 CAPACITY UTILIZATION

Retention of Child Care Facilities

The number of licensed child development centers and child development homes both decreased since 2008, by 22.4 percent and 2.4 percent, respectively. However, there was a substantial turnover in both the number and location of these facilities. (See Table 28)

TABLE 28
NET CHANGE IN THE NUMBER OF LICENSED CHILD CARE FACILITIES
BY WARD (2008-2010)

WARD	CLOSED (No.)		NEW LICENSE (No.)		NET CHANGE	
	Homes	Centers	Homes	Centers	Homes	Centers
1	6	7	0	5	-6 (-46.2%)	2 (6.5%)
2	4	7	0	12	-4 (-57.1%)	-5 (-6.8%)
3	0	3	0	3	0 (0.0%)	0 (0.0%)
4	7	11	4	5	-3 (-7.7%)	6 (15.8%)
5	13	4	2	6	-11 (-35.5%)	-2 (-5.3%)
6	10	8	5	11	-5 (-15.6%)	-3 (-7.0%)
7	17	5	5	8	-12 (-25.5%)	-3 (-8.6%)
8	7	7	3	10	-4 (-14.3%)	-3 (-6.7%)
Total	64	56	19	48	-45 (-22.4%)	-8 (-2.4%)

Source: 2010 Market Rate Survey

Nearly one-third (31.8 percent) of all family home providers and 16.6 percent of all child care center providers operating in 2008 were no longer licensed in 2010. These losses in service providers were somewhat offset by the addition of 48 newly licensed child development centers and 19 newly licensed child development homes during this two-year period. Forty (15.5 percent) of the centers responding to the 2008 Market Rate and Capacity Utilization Study were no longer licensed in 2010.

While most wards lost child care centers, Wards 1 and 4 experienced a net growth in the number of centers. Approximately 42.8 percent of centers closed were operated by the Department of Parks and Recreation. All wards, except Ward 3 which had no net change, experienced a decline in the number of family home providers.

Capacity Utilization

Survey respondents have a licensed capacity of 15,100 child care slots. Family home providers are licensed for 518 slots and child care center providers are licensed for 14,582. However, not all providers are able to provide services at their full licensed capacity. Providers were asked for the maximum number of children they could currently serve at one time. The ratio between the current enrollment and the current maximum served was computed to determine the capacity utilization for child care services in the District of Columbia.

Both family home providers and child care center providers had decreases in capacity utilization since 2008. The capacity utilization in 2010 is 76.1 percent for family home providers; 82.3 percent for child care center providers; and 82.1 percent for total providers. (See Table 29)

TABLE 29
CAPACITY AND ENROLLMENT BY PROVIDER TYPE (2010)

NO. OF CHILD CARE SLOTS	FAMILY HOME PROVIDERS	CHILD CARE CENTER PROVIDERS	TOTAL PROVIDERS
Licensed Capacity	518	14,582	15,100
Current Maximum	502	14,061	14,563
Current Enrollment	382	11,578	11,960
*Capacity Utilization - 2010	76.1%	82.3%	82.1%
*Capacity Utilization – 2008	78.6%	86.0%	85.6%

Source: 2010 Market Rate Survey

* Ratio of current enrollment to the current maximum

The capacity utilization was also computed for both market rate and OSSE/ECE contract providers. While 87.8 percent of current center capacity is being utilized at market rate centers, just 79.5 percent of center capacity is being utilized at OSSE/ECE contract centers. However, among family home providers, OSSE/ECE contract providers utilize nearly 81.0 percent of capacity while market rate providers utilize 67.1 percent of capacity.

Waiting List

Most family home providers and child care center providers maintain waiting lists for families seeking child care services at their facilities when no slots are available for the requested age group. These waiting lists are not related to the Child Care Subsidy Program. The Division of Early Childhood Education does not have a waiting list for families seeking child care subsidies.

There are currently 10,377 children on provider waiting lists. Family home providers have 234 children on waiting lists, including 211 children 0-3-years of age. Child care center providers have 10,143 children on waiting lists. While children ages 0-3-years are the largest single component of those on the waiting lists, there are significant numbers of children waiting in the preschool/prekindergarten age range (Table 30). Children under 3 years of age hold 7,381 waiting list slots, or 72.8 percent of the total, and children ages 3 and 4 years hold 2,220 of the remaining slots (21.9 percent).

The ratio of the total current wait list slots to total licensed capacity was computed in order to compare the severity of the current shortage with that of the 1998 shortage. As Table 30 shows, there are substantial numbers of children waiting for slots. Names on the list surpass the enrollment levels for the youngest age groups and exceed 10 percent for the other categories. The shortage of available slots increased from 36.9 percent of capacity in 1998 to 77.0 percent in 2008, but has decreased to 68.7 percent of capacity in 2010. While some of the names on the waiting lists may be duplicated on lists at more than one facility, the list has doubled during the past decade.

As shown in Table 31, children are on provider waiting lists in all wards in the District of Columbia and in all age categories except 13 to 18-year-olds. However, three-fourths (73.2 percent) of children on waiting lists are under 3-years of age and 21.6 percent are 3- and 4-year olds. More than half (56.8 percent) of children are waiting for slots at child care facilities located in Wards 1 and 2, and an additional 24.2 percent are waiting for slots in Wards 6 and 8.

TABLE 30
CURRENT ENROLLMENT AND WAITING LIST BY AGE AND PROVIDER GROUP (2010)

AGE GROUP	FAMILY HOME PROVIDERS		CHILD CARE CENTER PROVIDERS		TOTAL PROVIDERS	
	Enrollment	Wait List	Enrollment	Wait List	Enrollment	Wait List
Infant	64	120	1,211	3,599	1,275	3,719
Age 1	89	49	1,353	1,986	1,442	2,035
Age 2	115	42	2,195	1,796	2,310	1,838
Age 3	75	17	2,466	1,467	2,541	1,484
Age 4	24	6	1,938	753	1,962	759
School-age	15	0	2,389	542	2,404	542
Total	382	234	11,552	10,143	11,934	10,377
% Licensed Capacity - 2010	73.7%	45.2%	79.2%	69.6%	79.0%	68.7%

Source: 2010 Market Rate Survey

TABLE 31
DISTRIBUTION OF CHILD CARE WAITING LISTS BY AGE AND WARD (2010)

Ward	Infants	Age 1	Age 2	Age 3	Age 4	Age 5+	Total	%Total
Ward 1	358	257	401	459	143	13	1,631	15.7%
Ward 2	1,377	884	711	504	374	417	4,265	41.1%
Ward 3	328	76	151	99	40	16	710	6.8%
Ward 4	231	57	60	79	72	40	533	5.1%
Ward 5	130	35	74	47	16	0	288	2.9%
Ward 6	698	297	125	154	57	35	1,386	13.4%
Ward 7	170	90	133	34	12	3	442	4.3%
Ward 8	427	339	183	110	43	20	1,122	10.8%
Total	3,719	2,035	1,838	1,484	757	544	10,377	100.0%
% Total	35.8%	19.6%	17.7%	14.3%	7.3%	5.2%	100.0%	

Source: 2010 Market Rate Survey

3.4 OUT-OF-SCHOOL TIME ACTIVITIES

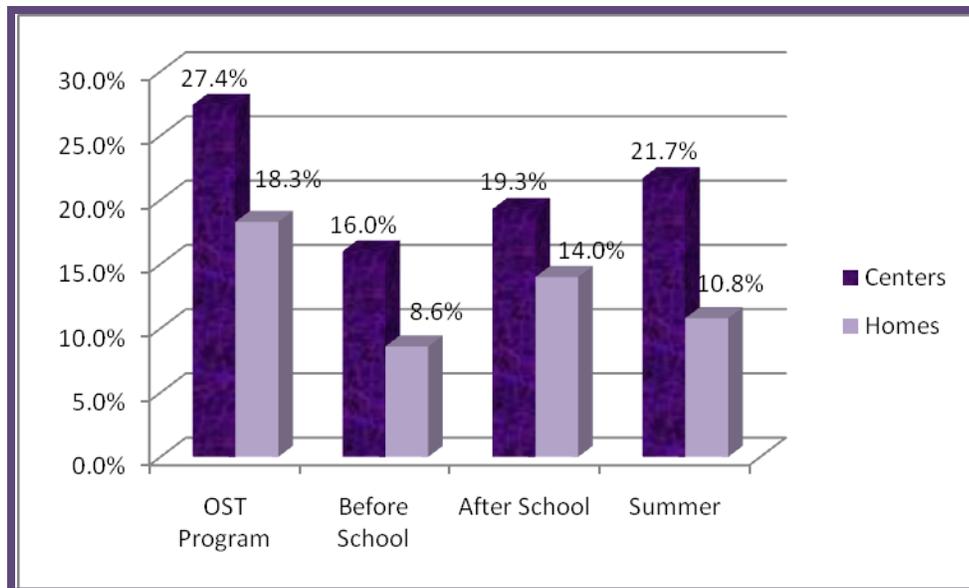
Characteristics of Out-of-School Time (OST) Programs

There has been a significant decline in the percent of child care providers offering special programs for school-age children outside of normal hours. In 2008, approximately 39.1 percent of child development centers and 19.2 percent of family homes offered special programs before school, after school, and/or during the summer for school-age children; however, just 27.4 percent of centers and 18.3 family homes offered OST programs in 2010. While 18.3 percent of family home providers offer OST programs, only 8.6 percent currently have school age children enrolled.

As shown in Figure 6, before school programs are the least likely OST programs to be offered by both center providers and home providers.

FIGURE 6

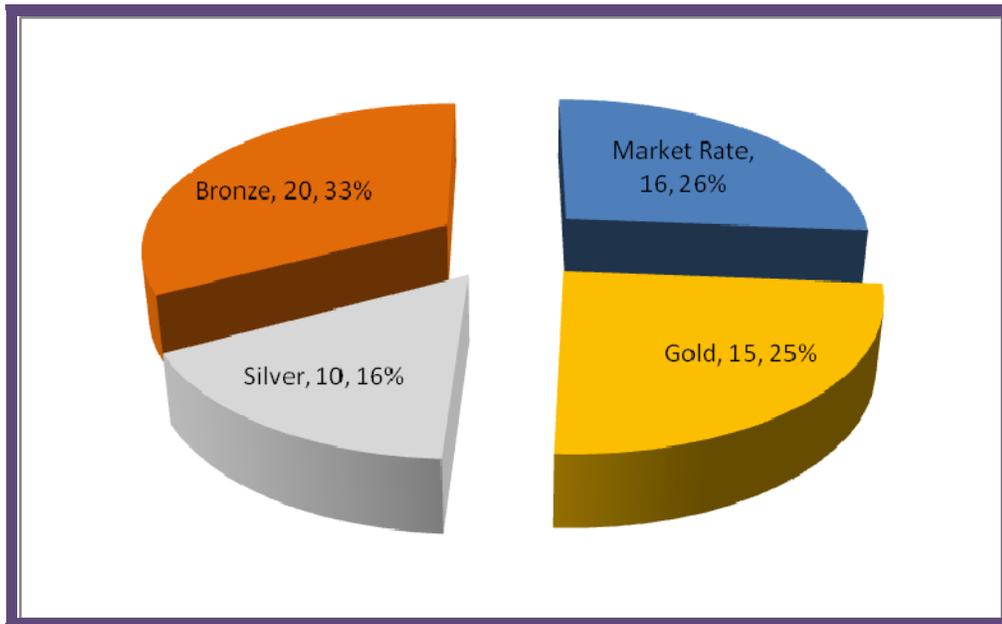
CHILD CARE PROVIDERS OFFERING OUT-OF-SCHOOL TIME SERVICES (2010)



Source: 2010 Market Rate Survey

More than one-fourth of the providers offering OST programs are market rate child care centers. The OSSE/ECE contract child care center providers offering OST services continue to include all tiers of the subsidy program; however, there is a significant increase in the percent of gold centers and a significant decrease in the percent of silver centers offering OST programs. In 2008, gold centers were 18 percent and silver centers were 23 percent of OST programs. Currently, silver tier centers are the least likely to offer these special programs (Figure 7).

FIGURE 7
DISTRIBUTION OF CENTERS OFFERING OUT-OF-SCHOOL-TIME PROGRAMS
BY TIER LEVEL (2010)



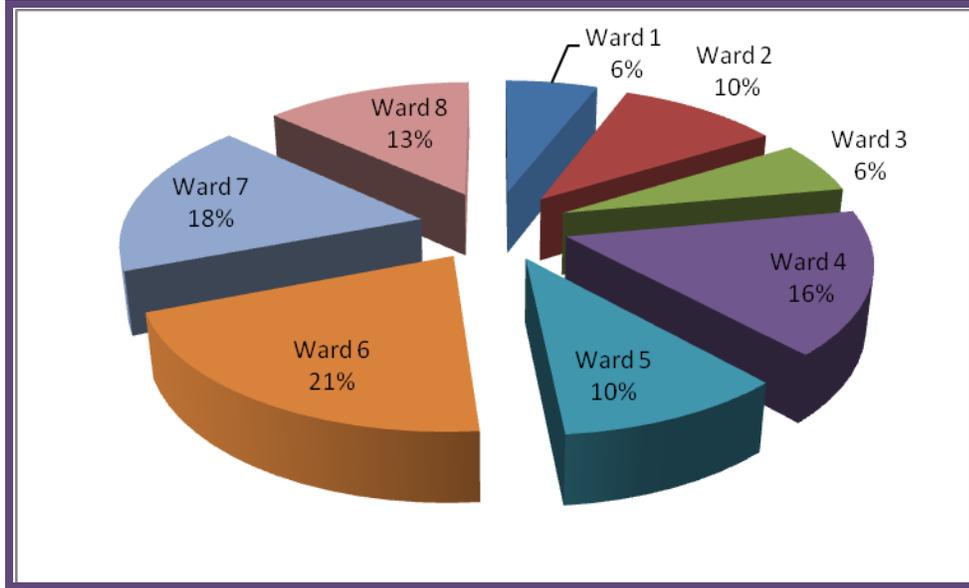
Source: 2010 Market Rate Survey

Location of OST Programs

Family home providers offering OST programs are located in Wards 2, 5, 6, 7, and 8. Center providers are located throughout the District of Columbia. As illustrated in Figure 8, if we look at the distribution of total center providers offering OST programs, the highest percentage of centers are in Ward 6 and the lowest percentage in Wards 1 and 3. However, if we examine the availability of OST programs as a percentage of the centers within a ward, then centers in Ward 7 (60.0 percent), Ward 6 (45.2 percent), and Ward 8 (31.0) are the most likely to offer programs (Table 32).

FIGURE 8

LOCATION OF CENTERS OFFERING OUT-OF-SCHOOL TIME PROGRAMS (2010)



Source: 2010 Market Rate Survey

Providers were asked if they provided before school, after school, and/or summer programs for school-age children. Not all providers offer each of these services. Overall, 55.7 percent of centers offering OST programs have before school services, 67.2 percent have after school services, and 75.4 percent offer summer programs.

Table 32 identifies program offerings by ward. Wards 1, 3 and 7 are the most likely to offer before school programs and Wards 1, 3 and 4 are the most likely to offer after school programs. Wards 2, 5 and 8 are the most likely to offer summer programs for school-age children. Ward 2 centers are the least likely to provide before school services and after school services. Ward 3 centers continue to be the least likely to provide summer programs.

TABLE 32

**CENTERS OFFERING OUT-OF-SCHOOL TIME PROGRAMS
BY WARD AND WHEN PROGRAMS ARE OFFERED**

Ward	% of Child Care Centers Within Ward Offering OST Program		When OST Programs are Offered					
			% Offering Before School		% Offering After School		% Offering Summer	
	2008	2010	2008	2010	2008	2010	2008	2010
Ward 1	33.3%	17.4%	88.9%	100.0%	100.0%	100.0%	66.7%	75.0%
Ward 2	19.3%	14.3%	63.6%	14.3%	81.8%	28.6%	54.5%	100.0%
Ward 3	46.2%	22.2%	58.3%	75.0%	50.0%	100.0%	33.3%	25.0%
Ward 4	42.3%	16.7%	45.5%	50.0%	63.6%	100.0%	81.8%	50.0%
Ward 5	40.7%	25.9%	36.4%	47.9%	63.6%	57.1%	63.6%	85.7%
Ward 6	34.0%	45.2%	45.5%	50.0%	63.6%	57.1%	63.6%	71.4%
Ward 7	62.5%	60.0%	60.0%	75.0%	66.7%	83.3%	66.7%	66.7%
Ward 8	53.8%	31.0%	76.2%	55.6%	85.7%	55.6%	28.6%	100.0%

Source: 2010 Market Rate Survey

Participation in OST Programs

Survey respondents were asked how many children are enrolled in out-of-school time programs at their facilities. While 2,389 school-age children are enrolled in centers responding to the survey, approximately 72.3 percent (1,727) are enrolled in centers providing special programs for school-age children. Survey respondents in Ward 4 have the lowest percentage (25.6 percent) of school-age children enrolled in centers offering special OST programs and respondents in Ward 7 have the highest percentage (98.2 percent).

Types of Activities

Providers with OST programs offer a wide variety of activities for children. The top ten activities in which most children participate are, in order of rank:

1. Field trips – 82.2%
2. Arts and Crafts – 67.5%
3. Games – 62.4%
4. Homework Assistance – 56.2%
5. Tutoring – 56.1%
6. Academic Enrichment – 53.0%
7. Computer Training – 47.2%
8. Aerobics/Exercise – 44.2%
9. Music – 38.7%
10. Drama – 36.8%

However, the types of activities in which children participate continue to vary by ward. Table 33 shows the activities offered and the percentage of enrolled school-age children participating in these activities by ward.

Arts and crafts are the top ranked activity in Wards 1 and 2 and the second ranked activity in Ward 6. Field trips are among the top ranked activities in all wards except Wards 1 and 4. Games are the second ranked activity in Wards 2, 7 and 8. Homework assistance is the top ranked activity in Ward 1 and the second ranked activity in Wards 3 and 5.

Most child care providers do not charge additional fees for OST activities; however, some do charge a registration fee for these programs.

Table 33

Participation in Out-of-School Time Activities by Activity Type and Ward

Activity	Percent (%) of Enrolled Children Participating in Activity							
	Ward 1 n=246	Ward 2 n=151	Ward 3 n=81	Ward 4 n=53	Ward 5 n=135	Ward 6 n=461	Ward 7 n=219	Ward 8 n=381
Tutoring	45.1%	92.7%	3.7%	100%	55.6%	62.9%	16.0%	68.5%
Arts & Crafts	45.1%	100%	30.9%	34.0%	77.8%	77.7%	54.8%	72.7%
Homework Assistance	45.1%	60.9%	53.1%	22.6%	91.9%	55.5%	51.6%	57.5%
Field Trips	28.9%	100%	76.5%	34.0%	100%	84.4%	99.1%	98.7%
Academic Enrichment	45.1%	80.8%	12.3%	43.4%	83.0%	63.6%	20.1%	52.5%
Music	0.0%	25.2%	24.5%	100%	80.7%	26.7%	60.7%	50.7%
Computer Training	0.0%	70.9%	6.2%	9.4%	38.5%	60.7%	30.6%	78.7%
Dance	0.0%	30.5%	24.5%	81.1%	51.9%	13.2%	47.0%	40.7%
Health/Nutrition	0.0%	67.5%	18.5%	0.0%	63.7%	23.0%	38.8%	42.0%
Drama	0.0%	6.6%	0.0%	81.1%	68.1%	8.7%	79.5%	72.4%
Aerobics/Exercise	16.3%	91.4%	18.5%	34.0%	68.1%	49.0%	43.4%	36.7%
Games	16.3%	94.0%	18.5%	34.0%	100%	60.3%	79.5%	72.4%
Sports	0.0%	61.6%	43.2%	34.0%	53.3%	11.3%	34.2%	42.0%
Bowling	0.0%	74.2%	0.0%	0.0%	60.0%	13.7%	48.4%	32.8%
Gymnastics	0.0%	25.2%	0.0%	0.0%	34.1%	11.3%	28.3%	0.0%
Skating	0.0%	60.9%	0.0%	0.0%	50.4%	13.7%	16.0%	5.5%
Swimming	16.3%	92.7%	0.0%	34.0%	83.7%	0.0%	18.3%	33.9%

Source: 2010 Market Rate Survey

3.5 PROVIDER DIFFICULTIES, CHALLENGES, AND PRIORITIES

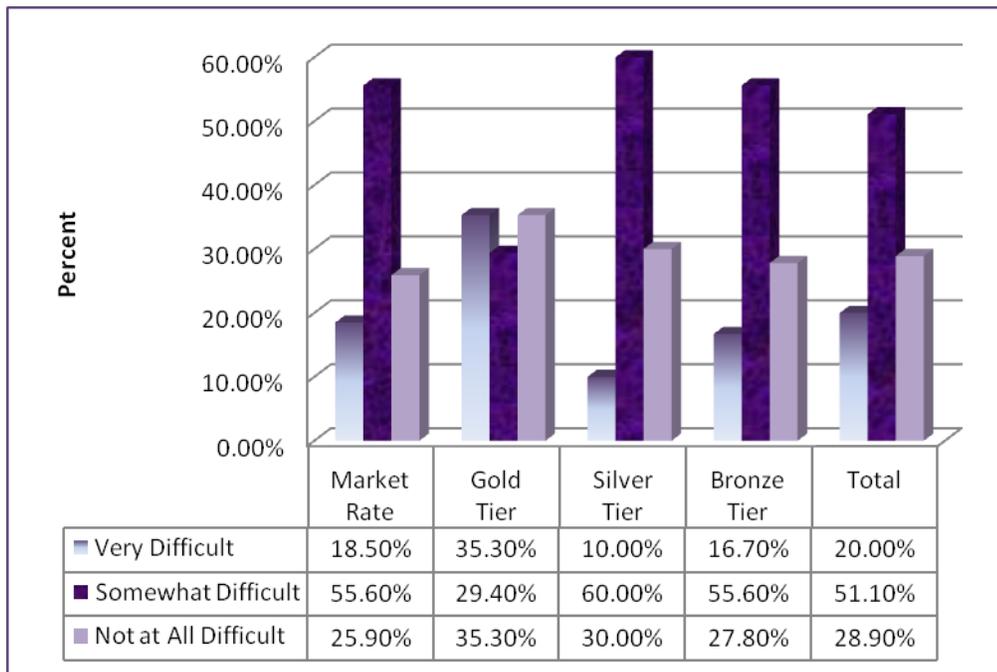
Child care providers were asked about difficulties and challenges they may have in operating their child care programs. They were also asked to identify a maximum of three priorities they would recommend that the District of Columbia government pursue in order to improve child care services in the city.

Difficulty Making Ends Meet

Both family home providers and child care center providers were asked whether they faced difficulties in making ends meet in their child care program. One-fifth of family home providers and 10.4 percent of child care center providers find it very difficult to make ends meet in their programs. As shown in Figure 9 and Figure 10 below, 28.7 percent of family home providers and 29.7 percent of child care center providers find it not at all difficult to make ends meet.

FIGURE 9

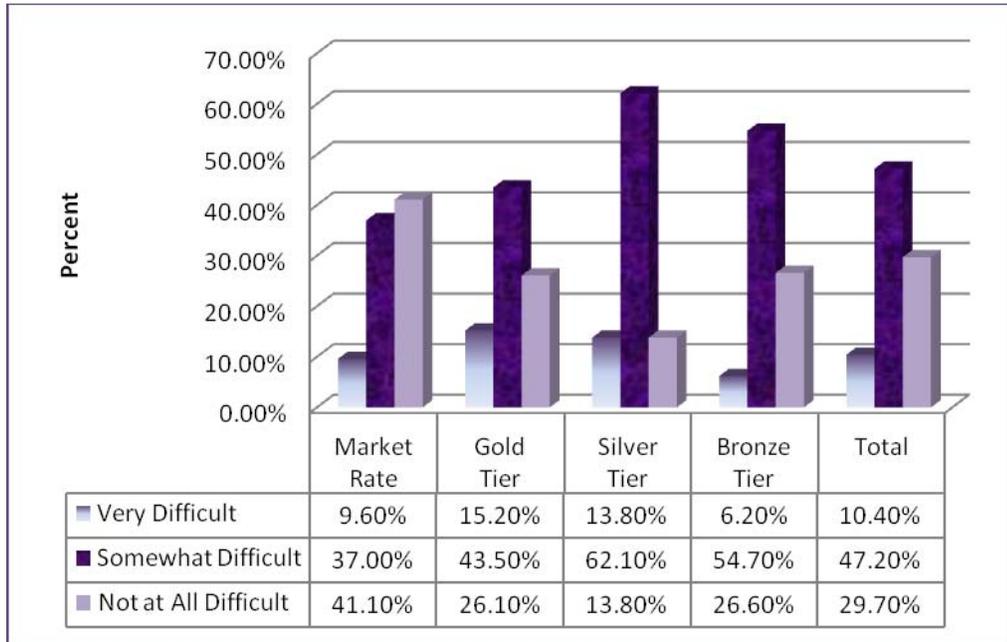
LEVELS OF DIFFICULTY FAMILY HOME PROVIDERS HAVE MAKING ENDS MEET IN THEIR CHILD CARE PROGRAM (2010)



Source: 2010 Market Rate Survey

FIGURE 10

LEVELS OF DIFFICULTY CHILD CARE CENTER PROVIDERS HAVE MAKING ENDS MEET IN THEIR CHILD CARE PROGRAM (2010)



Source: 2010 Market Rate Survey

Note: Several child care center providers expressed no opinion on the level of difficulty; thus, percentages do not total 100%.

Among family home providers, gold tier providers are much more likely to find it very difficult to make ends meet; however, overall, market rate providers face the most difficulty. Bronze tier providers have the highest difficulty levels among the OSSE/ECE contract family home providers.

Market rate child care center providers face lower levels of difficulty than OSSE/ECE contract child care center providers in making ends meet. Silver tier child care center providers find it most difficult to make ends meet.

Challenges in Recruiting and Retaining Staff

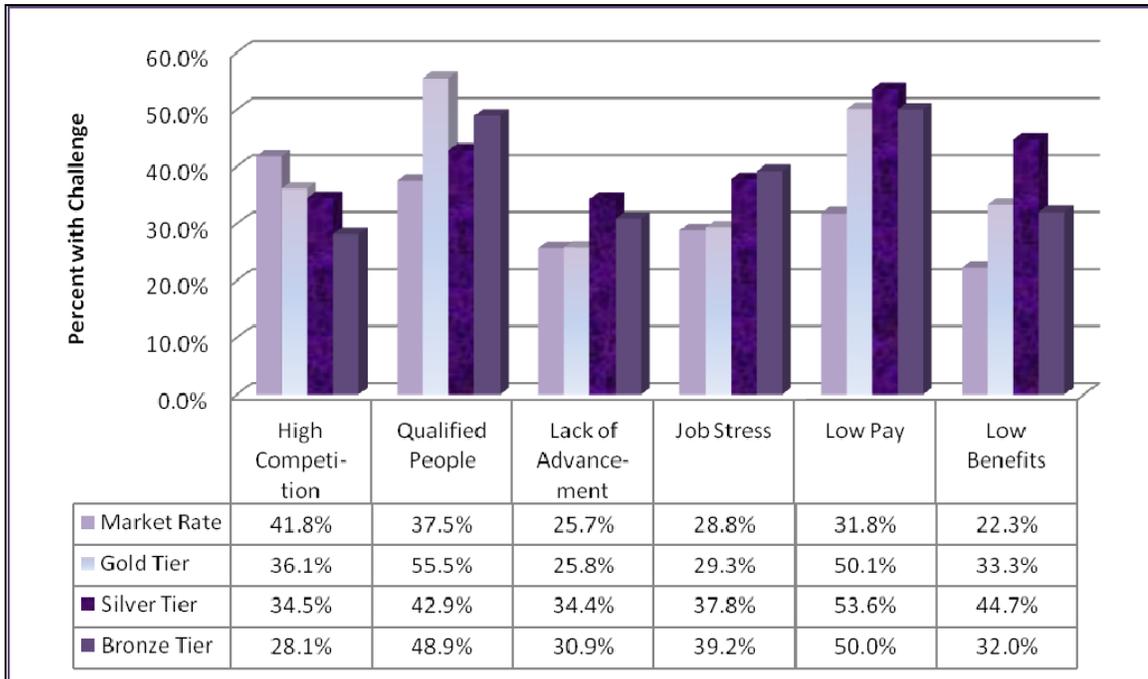
Child care center providers were probed about challenges they face in recruiting and retaining staff. Six areas of potential challenges were presented to providers: High competition, qualified people, lack of advancement opportunities, job stress, low pay, and low benefits. They were asked to rate their degree of challenge in each area on a 5 point scale: No challenge, little challenge, some challenge, more challenge, or big challenge.

Overall, the top three challenges identified are: Finding qualified people; low pay; and

high competition. However, as illustrated in Figure 11, there are differences in challenges identified by tier level. Market rate child care center providers find their biggest challenge in the competitive environment, while gold tier child care center

FIGURE 11

CHALLENGES FACED BY CHILD CARE CENTER PROVIDERS IN RECRUITING AND RETAINING STAFF BY TIER LEVEL (2010)



Source: 2010 Market Rate Survey

providers are most challenged by finding qualified staff. Both silver tier and bronze tier child care center providers find low pay as their biggest challenge. Low benefits are more of a challenge for silver tier providers and job stress is among the top three challenges for bronze tier providers.

Child care center providers were also invited to identify other areas of challenge that they face in recruiting and retaining staff. Other challenges identified include:

- Inability to offer full-time work
- Commuting distances into the District of Columbia
- Finding qualified staff willing and/or able to work with infants and toddlers
- Lack of vacation time
- Inadequate funding for professional development

- Child care rate increases not keeping pace with increases in operating costs

Child Care Provider Recommendations on Needed Actions

Both family home providers and child care center providers were asked to provide a maximum of three priority actions that the DC Government should take related to early childhood services. A total of 154 responses were received from family home providers and 219 responses were received from child care center providers. Priorities were reduced or condensed, coded, and described. Emerging themes were identified and four connecting or interrelated themes were developed.

Themes with the highest number of responses, for both family home providers and child care center providers, are:

1. System changes
2. Increases in child care rates
3. Additional supports
4. Training and/or professional development supports

System Changes

Changes recommended by family home providers address regulatory, process, and policy concerns:

- Increase the number of children family home providers can serve, including an increase in the number of infants and/or toddlers.
- Increase the population of family home providers.
- Improve communications between OSSE and family home providers by enhancing the timeliness, quantity and quality of information disseminated.
- Provide customer service training for staff that interacts with family home providers to foster more positive communication exchanges.
- Reduce bureaucracy and paperwork requirements.
- Reconsider educational and/or training requirements so that family home providers are not required to secure college degrees.

Changes recommended by child care center providers include:

- Reduce/streamline the bureaucracy and paperwork requirements for licensing, vouchers, and new immunization requirements.

- Do not guarantee spaces in elementary schools for pre-K, but increase the number of community-based organizations that participate in Pre-K; young children should be in center-based environments.
- Improve communications between OSSE and child care center providers. Provide customer service training for staff that interacts with centers.
- Establish a reliable substitute teacher organization.
- Increase the number of organizations allowed to give CDA certification training.
- Do not ask centers to utilize DCPS pay scales when staffing under grant programs. It is unfair to other staff not working on grant assisted programs within the same organization and/or building.
- Increase parent education programs and develop enforcement of attendance policies for children under kindergarten age.
- Provide more services for children with special needs.
- Develop policies and/or structures to help providers to stay afloat when provider resources are limited.
- Send checks in a timely manner.
- Establish a DC Twitter to receive provider input on a continuing basis.

Increase in Child Care Rates

Both family home providers and child care center providers recommend increasing rates more often to keep pace with rising operating costs.

Additional Supports

Additional supports include supplemental financial and organizational assistance aimed at strengthening the structural and/or organizational foundation of child care providers. Recommendations from family home providers and child care center providers include:

- Provide wage supplements for teachers.
- Withhold taxes from payments to family home providers.
- Grant paid vacation and sick leave to family home providers, particularly those with 15 years or more of service.

- Establish insurance and retirement benefit pools to reduce costs to individual providers.
- Increase supports for the purchase of supplies and equipment.
- Assist with accreditation activities.
- Increase facility expansion supports.

Training and/or Professional Development Supports

Training and professional supports include financial assistance, enhanced offerings, and more accessibility of training opportunities. Recommendations include:

- Increase funding for college degree programs and tuition reimbursement assistance.
- Provide more free or reduced rate continuing education opportunities.
- Make available more enhanced professional development opportunities.
- Offer more diversified training by OSSE.
- Provide more training opportunities on weekends.
- Create a development program for center directors.
- Establish more training sites, particularly for CDA training.
- Improve communications concerning available training for providers (to be received in a more timely fashion).
- Offer more specialized training sessions on working with children with special health care needs.
- Provide more workshops on curriculum and adopt a play-based curriculum.

4. CONCLUSIONS

Provider Characteristics

The decline in the number of both licensed family home providers and child care center providers has continued. The number of licensed homes and the number of licensed centers both declined since 2008, by 22.8 percent and 2.8 percent, respectively. These numbers, however, belie the degree of change within the community of child care providers in the District of Columbia. Given the large number of exits and entrants during the past two years, coupled with changes in the regulatory environment, the landscape for community-based early care and education programs has changed. A closer examination of characteristics and factors affecting stability in the child care market would facilitate the strategic management and policy formulation processes of both child care providers and public policymakers.

Child care providers continue to offer a wide range of services in the District of Columbia. Family child care providers consistently appear to be more flexible than child care center providers in addressing the demand for nontraditional hours of service (evening, overnight, and weekend).

The District of Columbia continues to ensure that comparable child care choices are available to families participating in the Child Care Subsidy Program. The percentage of child care center slots with providers participating in the subsidy program continues to increase. While in 1998 just 42 percent of enrolled center slots were with providers participating in the subsidy program, that percentage increased to 65.5 percent in 2008 and to 66.2 percent in 2010.

As a percentage of total enrollments, infant and toddler enrollment grew to 41.7 percent at OSSE/ECE contract centers in 2010. In 1998, only 11.3 percent of enrollees at OSSE/ECE contract centers were infants and toddlers compared to 32.8 percent at market rate centers. By 2008, infant and toddler enrollment increased to 39.3 percent of total enrollment at OSSE/ECE contract centers, surpassing the 30.9 percent at market rate centers. In 2010, there is little difference in the distribution of infant and toddler enrollment, with 39.8 percent at market rate centers compared to 41.7 percent at OSSE/ECE contract centers.

Services for children with disabilities appear to be more concentrated among fewer centers. While the number of children with disabilities enrolled with child care center providers increased, there was a decline in the percentage of centers serving this population (from 28.3 percent in 2008 to 24.3 percent in 2010).

Workforce

Center survey respondents have a total of 2,822 employees. Approximately 85.4 percent of all child care employees are directly involved with children in the classroom. The ratio of children to staff has increased at both market rate and OSSE/ECE contract child care centers. However, the disparity in the child to teacher ratio has continued to narrow and is currently near parity.

Child care providers continue to have a wide range of educational experiences and credentials. Although the degree of difference continues to decrease, wide disparities remain in the level of education credentials held by both teachers and total classroom personnel at market rate centers compared to staff at OSSE/ECE contract centers. Teachers at market rate centers are much more likely to have a Bachelor's degree or higher degree than are teachers at OSSE/ECE contract centers; conversely, teachers at contract centers are more likely to have a CDA than are teachers at market rate centers.

Overall, the percentage of teachers and family home providers with college degrees increased. Nearly 40 percent of family home providers and 64.7 percent of teachers have a college degree.

There is a decline in the mean and median hours of training for family home providers and a doubling of the percentage reporting no clock hours of training. On the other hand, there is an increase in the participation of center personnel in training activities. While 90 percent of centers reported training activities for some categories of employees, large percentages of employees participated in no formal training activities in 2010. Teachers were the center employees most likely to be engaged in training activities during the past year.

Average beginning salaries for child care employees range from \$18,109 per year or \$9.81 per hour for classroom aides to \$50,537 per year or \$26.97 per hour for administrators. The average beginning salary for teachers with a bachelor's degree or higher is \$31,803 per year or \$16.88 per hour. Salaries increased for all categories of employees except teachers with a bachelor's degree. Although, the mean salary for teachers with a bachelor's degree decreased at all tier levels except silver, this reduction is largely fueled by significant decreases in salaries paid at market rate centers. Still, teachers at market rate centers earned significantly higher salaries than teachers at OSSE/ECE contract centers.

The financial incentive for employees to increase their level of education is still clear. Teachers with a bachelor's degree earn 25.8 percent more than teachers with the CDA.

Many of the gains in benefit levels for both family home providers and employees at child care centers appear to be evaporating. Providers appear to be scaling back on benefits packages to offset the rising cost of operations. However, when benefits programs are offered, the percentage of participation continues to grow.

Revenue

The average gross enrollment revenue for family child care providers is \$36,242 per year. However, 25 percent of family home providers received less than \$25,007 in gross receipts. Gold tier providers have the highest level of gross revenue, as well as the highest mean enrollment.

The difference in gross enrollment revenue received by market rate center providers continues to be substantially higher, overall, than gross revenue received by providers with an OSSE/ECE contract or provider agreement. Market rate centers receive, on average, gross revenue of \$698,227 compared to \$487,446 for centers participating in the Child Care Subsidy Program. When adjusted for enrollment differences, revenues are just 22.5 percent higher at market rate centers.

Gold tier centers have the highest gross revenue levels. However, these centers have significantly higher enrollment levels than any other group, including market rate centers.

The percentage of child care center providers receiving non-cash benefits in the form of rent, utilities, and/or equipment decreased, while those receiving food contributions increased.

Accreditation

The percentage of center child care providers with national accreditation decreased; but, the percentage preparing to apply for accreditation increased. The large turnover in licensed facilities may explain some of this decline.

Market rate centers are more likely to be accredited; however, OSSE/ECE contract centers continue to be more likely to be accredited by NAEYC. The percentage of family home providers accredited decreased.

Child Care Rates

The percentage of child care center providers participating in the subsidy program dropped from approximately two-thirds of child care providers in the District of Columbia to 61.8 percent. This decline can be largely attributed to the closing and/or change in operators of the Department of Parks and Recreation centers.

Market rates charged for child care services at centers not participating in the subsidy program have increased an average of 4.9 percent since 2008. This includes increases in rates for children under 3-years and decreases in rates for 3- and 4-year olds. Private pay rates at centers participating in the subsidy program increased by 9.3 percent overall, with increases in all rates except those for 2-year olds. Rates increased across all groups for school-age children when school is closed. Rates for total providers increased an average of 13.2 percent

Market rates for family home providers not participating in the subsidy program decreased for infants and 1-year olds, but increased substantially for 2-, 3-, and 4- year olds. For total family home providers, rates increased an average of 9.8 percent for infants and 1-year olds, but did not change for 2- and 3-year old children.

Capacity Utilization and Expansion

There has been a decline in the capacity utilization rate for both family home providers and child care center providers since 2008. Yet, there are large numbers of children names on provider waiting lists. The average number of lists a particular child's name may be listed on is unknown.

More than 41 percent of children on waiting lists are on lists at centers in Ward 2, the downtown business district. Ward 2 centers also have the largest number of nonresident children enrolled. More than 55 percent of the waiting lists are comprised of the names of infants and 1-year olds.

There appears to be a mismatch between the slots needed and/or desired and the current supply.

Out-of-School Time Activities

Out-of-school time (OST) services are available throughout the city. However, there is a decline in the percentage of child care providers with OST offerings. Providers in Ward 6, Ward 7, and Ward 8 are the most likely to offer OST programs.

A wide range of activities remain available; however, there are different patterns of participation in the various wards of the city. Field trips, arts and crafts, and games are the top three activities offered, followed by homework assistance, tutoring, and academic enrichment activities.

Most providers do not charge additional fees for these activities.

Provider Difficulties, Challenges, and Recommendations

Most providers do find some difficulty in making ends meet in their programs. While gold tier family home providers and gold tier child care center providers have the highest gross revenue levels, they are the greatest percentage of providers finding it very difficult to make ends meet. Among family home providers, bronze tier providers have the highest percentage of providers expressing some level of difficulty; however, among child care center providers, silver tier providers have the highest percentage expressing some level of difficulty.

The top three challenges faced by child care center providers in recruiting and retaining staff are finding qualified people, low pay, and high competition. Gold tier providers are experiencing the biggest challenge in finding qualified people. Finding qualified people willing to work with infants and toddlers was emphasized by some providers. Low pay is reported as a bigger challenge for OSSE/ECE contract providers. Salary levels are also substantially lower with contract providers than with market rate providers. Bronze tier providers seem to be the least challenged by a competitive environment.

Both family home providers and child care center providers recommend that OSSE/ECE take some steps to reduce the bureaucracy and to streamline paperwork requirements related to licensing, payments and immunization. Both provider groups also recommend improved communication systems and staff training in customer service.

Providers are asking for supports in organizing and/or funding benefits pools and a reliable substitute teacher organization. The decreasing benefits levels support the urgency expressed here. Also, some of the inability to participate in training would be mitigated by the availability of reliable substitutes.

Family home providers would like to see an increase in the number of children they may serve at one time. They also would like to be compensated for some vacation and/or sick leave time.

Child care center providers would like to see the development program for center directors implemented. They also feel a need for more supports in the area of professional development.

Several providers expressed a concern that community-based programs are a more appropriate setting for young children, particularly 3-year-olds. They would like OSSE/ECEs support and assistance in strengthening their programs. Or in the words of one provider:

“Strengthen the value, respect and support for community-based programs!”

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APPENDICES

- A. LOCATION OF NON-RESPONDENT CHILD CARE CENTERS BY WARD**
- B. DAILY 75TH PERCENTILE, MEDIAN, AND MEAN CHILD CARE RATES FOR TOTAL ENROLLED SLOTS**
- C. 2010 MARKET RATE SURVEY INSTRUMENTS**

Appendix A

LOCATION OF NON-RESPONDENT CHILD CARE PROVIDERS BY WARD

2010

WARD	FAMILY HOME PROVIDERS		CENTER PROVIDERS		TOTAL PROVIDERS	
	No.	%	No.	%	No.	%
Ward 1	1	2.9%	9	9.3%	4	7.6%
Ward 2	1	2.9%	18	18.6%	17	14.4%
Ward 3	1	2.9%	16	16.5%	8	12.9%
Ward 4	13	37.1%	17	17.5%	16	22.7%
Ward 5	5	14.3%	6	6.2%	13	8.3%
Ward 6	5	14.3%	8	8.2%	9	9.8%
Ward 7	5	14.3%	12	12.4%	12	12.9%
Ward 8	4	11.4%	11	11.3%	8	11.4%
Total	35	100.0%	97	100.0%	87	100.0%

Source: 2010 Market Rate Survey

APPENDIX B

Daily 75th Percentile, Median, and Mean Child Care Rates for Total Enrolled Slots

Service Group	75 th Percentile	Median	Mean	Standard Deviation
Family home providers				
Infant Total Slots n=60	\$45.00	\$35.00	\$36.72	\$11.31
OSSE/ECE Contract n=38	\$40.50	\$35.00	\$34.96	\$10.40
Market Rate n=22	\$46.00	\$40.00	\$39.90	\$12.41
Age 1 Total Slots n=86	\$37.75	\$33.00	\$34.97	\$10.22
OSSE/ECE Contract n=66	\$36.00	\$33.00	\$33.69	\$9.10
Market Rate n=20	\$47.50	\$33.00	\$39.82	\$12.89
Age 2 Total Slots n=113	\$35.00	\$30.00	\$34.34	\$10.41
OSSE/ECE Contract n=81	\$34.25	\$30.00	\$31.63	\$6.19
Market Rate n=32	\$50.00	\$35.00	\$41.66	\$15.14
Age 3 Total Slots n=72	\$35.00	\$30.00	\$34.08	\$11.83
OSSE/ECE Contract n=57	\$33.00	\$30.00	\$30.53	\$6.63
Market Rate n=15	\$62.50	\$45.00	\$48.31	\$16.91
Age 4 Total Slots n=20	\$31.00	\$29.00	\$30.21	\$8.57
OSSE/ECE Contract n=16	\$31.00	\$29.00	\$28.67	\$3.13
Market Rate n=4	\$55.25	\$31.00	\$36.00	\$18.38
Full-time when school closed(5+)				
Total Slots n=53	\$27.25	\$22.00	\$23.44	\$9.14
OSSE/ECE Contract n=46	\$25.80	\$22.00	\$22.69	\$6.98
Market Rate n=7	\$52.50	\$20.50	\$29.00	\$18.89
Child Care Centers				
Infant Total Slots n=1169	\$70.40	\$55.00	\$58.11	\$19.73
OSSE/ECE Contract n=753	\$60.00	\$54.41	\$51.79	\$15.17
Market Rate n=416	\$75.29	\$69.20	\$69.33	\$21.82
Age 1 Total Slots n=1308	\$67.44	\$52.15	\$56.59	\$18.93
OSSE/ECE Contract n=784	\$50.80	\$50.80	\$50.42	\$14.07
Market Rate n=524	\$72.47	\$66.00	\$67.84	\$21.34
Age 2 Total Slots n=2007	\$58.66	\$50.00	\$48.88	\$16.63
OSSE/ECE Contract n=1442	\$51.00	\$46.23	\$45.27	\$13.29
Market Rate n=565	\$64.20	\$59.80	\$57.60	\$20.28
Age 3 Total Slots n=2163	\$53.49	\$42.00	\$43.17	\$15.86
OSSE/ECE Contract n=1406	\$46.19	\$40.00	\$39.29	\$12.82
Market Rate n=757	\$57.78	\$51.96	\$50.19	\$18.25
Age 4 Total Slots n=1657	\$54.04	\$42.00	\$43.88	\$19.61
OSSE/ECE Contract n=1055	\$50.00	\$39.83	\$41.23	\$18.70
Market Rate n=602	\$57.60	\$48.91	\$47.75	\$20.27
Full-time when school closed(5+)				
Total Slots n=1552	\$54.00	\$30.00	\$36.87	\$15.55
OSSE/ECE Contract n=1285	\$45.00	\$30.00	\$33.97	\$13.67
Market Rate n=267	\$57.30	\$50.00	\$50.99	\$16.46

Source: 2010 Market Rate Survey

APPENDIX C

Family Provider Survey Instrument

2010 MARKET RATE AND CAPACITY SURVEY: DISTRICT OF

1. What is your current ward location?

- | | | |
|------------------------------|------------------------------|----------------------------------|
| <input type="radio"/> Ward 1 | <input type="radio"/> Ward 4 | <input type="radio"/> Ward 7 |
| <input type="radio"/> Ward 2 | <input type="radio"/> Ward 5 | <input type="radio"/> Ward 8 |
| <input type="radio"/> Ward 3 | <input type="radio"/> Ward 6 | <input type="radio"/> Don't Know |

2. Days of Operation:

- Monday Tuesday Wednesday Thursday Friday Saturday Sunday

3. Number of Months of Operation per Year:

4. Which of the following describes the type of child development provider you are?

(Check all that apply).

- | | |
|---|--|
| <input type="checkbox"/> (a) Non-Profit Provider (Tax-Exempted) | <input type="checkbox"/> (j) Part of a Child Care System/Network |
| <input type="checkbox"/> (b) For Profit Provider | <input type="checkbox"/> (k) Part of UPO Child Care System/Network |
| <input type="checkbox"/> (c) District Government Agency | <input type="checkbox"/> (l) Part of FCS Child Care System/Network |
| <input type="checkbox"/> (d) Dept. of Defense Provider | <input type="checkbox"/> (m) Part of ARE Child Care System/Network |
| <input type="checkbox"/> (e) Federal, Non-DOD Provider | <input type="checkbox"/> (n) Montessori |
| <input type="checkbox"/> (f) Cooperative Provider | <input type="checkbox"/> (o) Child Development Center |
| <input type="checkbox"/> (g) Head Start Provider | <input type="checkbox"/> (p) Private School |
| <input type="checkbox"/> (h) Early Head Start Provider | <input type="checkbox"/> (q) Employer/Corporate Provider |
| <input type="checkbox"/> (i) Faith-Based Organization | <input type="checkbox"/> (r) 23-Hour Provider |
| <input type="checkbox"/> (s) Other (please specify) | |

5. Number of licensed child care spaces and maximum number of children you can currently serve at any one time.

(a) How many child care spaces are you licensed for?

(b) What is the maximum number of children you can currently serve at any one time?

6. Number of children currently enrolled in your child care program.

(a) How many children do you currently have enrolled in your child care program?

(b) If greater than the licensed capacity, please explain:

7. How many of the enrolled children are DC residents?

2010 MARKET RATE AND CAPACITY SURVEY: DISTRICT OF

8. participation in the Child and Adult Care Food Program (CACFP).

(a) Do you participate in the Child and Adult Care Food Program?

(b) If NO are you aware of the program?

9. Does your child development program offer the following types of service?

- | | |
|---|---|
| <input type="checkbox"/> (a) Full-time Care (35 or more hrs/wk) | <input type="checkbox"/> (i) Before School |
| <input type="checkbox"/> (b) Part-time Care (Less than 35 hrs/wk) | <input type="checkbox"/> (j) After School (after 3:00 p.m.) |
| <input type="checkbox"/> (c) Evening Care | <input type="checkbox"/> (k) Full-Day During School Closing |
| <input type="checkbox"/> (d) Overnight Care | <input type="checkbox"/> (l) Mildly Ill or Sick Children |
| <input type="checkbox"/> (e) Saturday | <input type="checkbox"/> (m) Children with Disabilities |
| <input type="checkbox"/> (f) Sunday | <input type="checkbox"/> (n) Emergency or Back-up Care |
| <input type="checkbox"/> (g) Holiday | <input type="checkbox"/> (o) Transportation |
| <input type="checkbox"/> (h) Drop-in | |

10.(a) Indicate the time service begins.

- | | HH | MM | AM/PM |
|----------------------------------|----------------------|------------------------|----------------------|
| (a) Evening Care | <input type="text"/> | : <input type="text"/> | <input type="text"/> |
| (b) Before School | <input type="text"/> | : <input type="text"/> | <input type="text"/> |
| (c) After School (after 3:00 PM) | <input type="text"/> | : <input type="text"/> | <input type="text"/> |

10.(b) Indicate the time service ends.

- | | HH | MM | AM/PM |
|----------------------------------|----------------------|------------------------|----------------------|
| (a) Evening Care | <input type="text"/> | : <input type="text"/> | <input type="text"/> |
| (b) Before School | <input type="text"/> | : <input type="text"/> | <input type="text"/> |
| (c) After School (after 3:00 PM) | <input type="text"/> | : <input type="text"/> | <input type="text"/> |

11. How many days per year is your program closed for the following?

- (a) Holidays
- (b) Vacation
- (c) Staff Training

12.(a) Does your program have a contract or provider agreement with the Child Care Subsidy Program? If yes, at what level is your program? If No Go to Question 13.

- NO
 YES, Bronze
 YES, Silver
 YES, Gold

2010 MARKET RATE AND CAPACITY SURVEY: DISTRICT OF

12.(b) How many slots are currently being used by the Child Care Subsidy Program?

13. Do you offer other types of fee reductions to help low-income families afford your services?

 (a) NO

 (b) YES, Sliding fee based on family income

 (c) YES, Scholarships

 (d) YES, Other (please specify)

14. What is the total number of children enrolled whose charges are paid for fully or in part by subsidies, government funds, or another agency?

15. Do you provide information to parents about government subsidies for child care?

 YES

 NO

16. Has your program recently provided care to a child with a disability?

 No

 Yes, Currently

 Yes, during the past 3 years

THE FOLLOWING QUESTIONS RELATE TO THE NUMBER OF CHILDREN YOU SERVE AND YOUR RATES. QUESTIONS ABOUT FULL-TIME CARE AND PART-TIME CARE FOR CHILDREN ARE BEING ASKED SEPARATELY. FULL-TIME CARE IS 35 HOURS A WEEK OR MORE; PART-TIME CARE IS LESS THAN 35 HOURS A WEEK.

17. What are the FULL TIME (35 hours or more per week) and PART TIME (less than 35 hours per week) enrollment in your program for each of the following age groups?

	Current Full Time Enrollment	Current Part Time Enrollment
(a) Infants	<input type="text"/>	<input type="text"/>
(b) Age 1	<input type="text"/>	<input type="text"/>
(c) Age 2	<input type="text"/>	<input type="text"/>
(d) Age 3	<input type="text"/>	<input type="text"/>
(e) Age 4	<input type="text"/>	<input type="text"/>
(f) Age 5	<input type="text"/>	<input type="text"/>
(g) Ages 6 through 12	<input type="text"/>	<input type="text"/>
(h) Ages 13 through 18	<input type="text"/>	<input type="text"/>

2010 MARKET RATE AND CAPACITY SURVEY: DISTRICT OF

18. How many children with disabilities do you currently serve for both Full Time and Part Time? If no children with disabilities, go to Question 19.

	Full Time Enrolled Children with Disabilities	Part Time Enrolled Children with Disabilities
(a) Infants	<input type="text"/>	<input type="text"/>
(b) Age 1	<input type="text"/>	<input type="text"/>
(c) Age 2	<input type="text"/>	<input type="text"/>
(d) Age 3	<input type="text"/>	<input type="text"/>
(e) Age 4	<input type="text"/>	<input type="text"/>
(f) Age 5	<input type="text"/>	<input type="text"/>
(g) Ages 6 through 12	<input type="text"/>	<input type="text"/>
(h) Ages 13 through 18	<input type="text"/>	<input type="text"/>

19. How are your FULL-TIME rates charged? If No Children enrolled Full-Time, Go to Question 22.

- (a) Hourly
 (b) Daily
 (c) Weekly
 (d) Monthly
 (e) Yearly

20. What do you charge for FULL-TIME care for each of the following age groups?

(a) Infants	<input type="text"/>
(b) Age 1	<input type="text"/>
(c) Age 2	<input type="text"/>
(d) Age 3	<input type="text"/>
(e) Age 4	<input type="text"/>
(f) Age 5	<input type="text"/>
(g) Ages 6 through 12	<input type="text"/>
(h) Ages 13 through 18	<input type="text"/>

2010 MARKET RATE AND CAPACITY SURVEY: DISTRICT OF

21. Please estimate by age group the number of FULL-TIME hours the typical child attends your program:(Please fill in columns by hour, day, AND month for ages that apply only).

	Hours Per Day	Days Per Week	Months Per Year
(a) Infants	<input type="text"/>	<input type="text"/>	<input type="text"/>
(b) Age 1	<input type="text"/>	<input type="text"/>	<input type="text"/>
(c) Age 2	<input type="text"/>	<input type="text"/>	<input type="text"/>
(d) Age 3	<input type="text"/>	<input type="text"/>	<input type="text"/>
(e) Age 4	<input type="text"/>	<input type="text"/>	<input type="text"/>
(f) Age 5	<input type="text"/>	<input type="text"/>	<input type="text"/>
(g) Ages 6 through 12	<input type="text"/>	<input type="text"/>	<input type="text"/>
(h) Ages 13 through 18	<input type="text"/>	<input type="text"/>	<input type="text"/>

22. How are your PART-TIME rates charged? If No Children enrolled Part-Time, go to question 26.

- (a) Hourly
 (b) Daily
 (c) Weekly
 (d) Monthly
 (e) Yearly

23. What do you charge for PART-TIME care for each of the following age groups?

(a) Infants	<input type="text"/>
(b) Age 1	<input type="text"/>
(c) Age 2	<input type="text"/>
(d) Age 3	<input type="text"/>
(e) Age 4	<input type="text"/>
(f) Age 5	<input type="text"/>
(g) Ages 6 through 12	<input type="text"/>
(h) Ages 13 through 18	<input type="text"/>

2010 MARKET RATE AND CAPACITY SURVEY: DISTRICT OF

24. Please estimate the number of hours by day, week, AND month that the typical child attends your PART-TIME program: (Answer for ages that apply only).

	Hours per Day	Days per Week	Months per Year
(a) Infants	<input type="text"/>	<input type="text"/>	<input type="text"/>
(b) Age 1	<input type="text"/>	<input type="text"/>	<input type="text"/>
(c) Age 2	<input type="text"/>	<input type="text"/>	<input type="text"/>
(d) Age 3	<input type="text"/>	<input type="text"/>	<input type="text"/>
(e) Age 4	<input type="text"/>	<input type="text"/>	<input type="text"/>
(f) Age 5	<input type="text"/>	<input type="text"/>	<input type="text"/>
(g) Ages 6 through 12	<input type="text"/>	<input type="text"/>	<input type="text"/>
(h) Ages 13 through 18	<input type="text"/>	<input type="text"/>	<input type="text"/>

25. Do families using PART-TIME care have to pay for a minimum number of hours?

Yes

No

If yes, what is the minimum number of hours?

26.(A) Do you have additional charges for the following services? If NO, go to question 27:

(a) NO

(b) Yes, Summer

(c) Yes, Before/After Services

26.(B) Please indicate the rate (\$__per__).

(a) Summer

(b) Before/After Services

27.(A) If you offer both traditional hours and nontraditional hours, do you charge different rates for:

(a) No

(d) Yes, Evening Care

(b) Yes, Overnight

(e) Yes, Extended Hours

(c) Yes, Weekend

27.(B) If Yes to Question 27A, please indicate the rate (\$__per__).

(a) Overnight

(b) Weekend

(c) Evening Care

(d) Extended Hours

2010 MARKET RATE AND CAPACITY SURVEY: DISTRICT OF

28. How many school age children (ages 4 years and older) did you serve FULL-TIME (35 hours or more per week) during the last time school was not in session: e.g., school breaks, school vacations, or summers? IF NONE, GO TO QUESTION 30.

29. What do you charge for FULL-TIME care when school is not in session for children ages 4 years and older? (\$__PER__).

30. Does your program have a waiting list? IF NO, GO TO QUESTION 32.

Yes

No

31. How many children are currently on your waiting list for each of the following age groups?

(a) Infants

(b) Age 1

(c) Age 2

(d) Age 3

(e) Age 4

(f) Age 5

(g) Ages 6 through 12

(h) Ages 13 through 18

32. How much do you charge, if anything, for the following services?

(a) Registration

(b) Supplies

(c) Activities/Programs

(d) Meals

(e) Liability Insurance

(f) Transportation

(g) Late Fees

(h) Other (Identify)

2010 MARKET RATE AND CAPACITY SURVEY: DISTRICT OF

37.(B) If your program is not currently accredited, what assistance would you need to become accredited?

- (a) Additional Information
 (c) Mentor
 (b) Assistance with Fees
 (d) Don't intend to apply

38. How many people, including yourself work in your program on a normal day? Please list the individuals by TITLE and indicate whether they are full Time(FT) or Part Time(PT).

- (a)
- (b)
- (c)
- (e)
- (f)

39. How long have you served as a family child development provider?

40. What is your HIGHEST Educational degree? Is the degree in Early Childhood Education or related field?

	H.S./GED	Associate	Bachelors	Masters or Higher
(a) Owner	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
(b) Other	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
(c) Total degrees in Early Childhood Education or Related fields	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Other, Please Identify Related Fields

41. Do you have the CDA Certification?

- Yes
 No

42. What is the average number of clock hours per year you spend in training? Clock hours include training during work hours and training during non work hours. (Include enrollment in college courses, CDA training, etc...)

	College Classes	CDA Training	Training with focus on Disability	Other
(a) Owner	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
(b) Other	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Please identify Other Training

43. Who pays for training?

2010 MARKET RATE AND CAPACITY SURVEY: DISTRICT OF

44. Do you have a working computer with access to the internet?

Yes

No

45. Which of the following benefits, if any, do you currently have? . (If you have no benefits, proceed to Question 47).

(a) Health Insurance

(e) Paid Sick Leave

(b) Life Insurance

(f) Paid Vacation

(c) Disability Insurance

(g) None

(d) Retirement Plan

(h) Other Please Identify

46. Who provides your benefits?

(a). Self

(b). Spouse

Other (please specify)

47. Without access to health insurance, would you continue as a family child care provider?

Yes

No

Not Sure

48. How much in out-of-pocket health care expenses did you spend in the last year?

49. How often did you use the emergency room in the past year?

(a) For your own care?

(b) For your child's care?

50. Do you use volunteers in your program? (By volunteers I mean anyone working for at least one hour during the week who is not directly paid by your program.) If Yes, answer (a) and (b).

Do you use volunteers in your program?

(a) What is the TOTAL number of volunteer hours worked in your program by volunteer workers during the average week?

(b) How many of these hours are provided by parents and guardians per week?

51. How difficult is it for you to make ends meet to keep your child care activity going?

(a) Very Difficult

(b) Somewhat Difficult

(c) Not at all difficult

2010 MARKET RATE AND CAPACITY SURVEY: DISTRICT OF

THE FINAL QUESTIONS RELATE TO SCHOOL AGE OUT-OF-SCHOOL-TIME ACTIVITIES.

52. Do you have special programs for school age children outside of normal school hours? If No, please go to Question 56

Yes

No

53. If yes to Question 52, what time of day are the programs offered?

(a) Before School

(b) After School

(c) Summer

54. Indicate the number of school age children who participate in the following of activities. If None, enter zero.

(a) Tutoring	<input type="text"/>
(b) Homework Assistance	<input type="text"/>
(c) Academic Enrichment	<input type="text"/>
(d) Computer Training	<input type="text"/>
(e) Health/Nutrition	<input type="text"/>
(f) Aerobics/Exercise	<input type="text"/>
(g) Sports	<input type="text"/>
(h) Gymnastics	<input type="text"/>
(i) Swimming	<input type="text"/>
(j) Arts and Crafts	<input type="text"/>
(k) Field Trips	<input type="text"/>
(l) Music	<input type="text"/>
(m) Dance	<input type="text"/>
(n) Drama	<input type="text"/>
(o) Games	<input type="text"/>
(p) Bowling	<input type="text"/>
(q) Skating	<input type="text"/>
(r) Other	<input type="text"/>

55. Please indicate other charges applicable to your program? (Please Specify FEE PER CHILD for each applicable category).

(a) Registration	<input type="text"/>
(b) Supplies	<input type="text"/>
(c) Snacks	<input type="text"/>
(d) Transportation	<input type="text"/>
(e) Insurance	<input type="text"/>
(f) Other	<input type="text"/>

2010 MARKET RATE AND CAPACITY SURVEY: DISTRICT OF

56. If the District Government were to take additional action related to early childhood services, what would you advise them to do? List maximum of 3 priorities.

Priority 1

Priority 2

Priority 3

57. Please provide the facility ID number.

58. What is your current zip code?

Child Care Center Provider Survey Instrument

2010 MARKET RATE AND CAPACITY SURVEY: UDC/CARUP

DISTRICT OF COLUMBIA CHILD DEVELOPMENT CENTER

1. What is your current ward location?

- | | | |
|------------------------------|------------------------------|----------------------------------|
| <input type="radio"/> Ward 1 | <input type="radio"/> Ward 4 | <input type="radio"/> Ward 7 |
| <input type="radio"/> Ward 2 | <input type="radio"/> Ward 5 | <input type="radio"/> Ward 8 |
| <input type="radio"/> Ward 3 | <input type="radio"/> Ward 6 | <input type="radio"/> Don't Know |

2. Days of operation:

- Monday Tuesday Wednesday Thursday Friday Saturday Sunday

3. Number of months of operation per year.

4. Which of the following describes the type of child development provider you are? (Check all that apply).

- | | |
|--|--|
| <input type="checkbox"/> (a) Non-Profit Provider (Tax-Exempted) | <input type="checkbox"/> (k) Part of UPO Child Care System/Network |
| <input type="checkbox"/> (b) For Profit Provider | <input type="checkbox"/> (l) Part of FCS Child Care System/Network |
| <input type="checkbox"/> (c) District Government Agency | <input type="checkbox"/> (m) Part of ARE Child Care System/Network |
| <input type="checkbox"/> (d) Dept. of Defense Provider | <input type="checkbox"/> (n) Part of other Child Care System/Network |
| <input type="checkbox"/> (e) Federal, Non-DOD Provider | <input type="checkbox"/> (o) Montessori |
| <input type="checkbox"/> (f) Cooperative Provider | <input type="checkbox"/> (p) Child Development Center |
| <input type="checkbox"/> (g) Head Start Provider | <input type="checkbox"/> (q) Private School |
| <input type="checkbox"/> (h) Early Head Start Provider | <input type="checkbox"/> (r) Employer/Corporate Provider |
| <input type="checkbox"/> (i) Pre-kindergarten Incentive Programs | <input type="checkbox"/> (s) 23-Hour Provider |
| <input type="checkbox"/> (j) Faith-Based Organization | <input type="checkbox"/> (t) Charter School |
| <input type="checkbox"/> (u) Other (please specify) | |

5. Number of licensed child care spaces and maximum number of children you can currently serve at any one time.

- (a) How many child care spaces are you licensed for?
- (b) What is the maximum number of children you can currently serve at any one time?

6. Number of children currently enrolled in your child care program.

- (a) How many children do you currently have enrolled in your child care program?
- (b) If greater than the licensed capacity, please explain:

2010 MARKET RATE AND CAPACITY SURVEY: UDC/CARUP

7. How many of the enrolled children are DC residents?

8. Participation in Child and Adult Care Food Program(CACFP).

(a) Do you participate in the Child and Adult Care Food Program?

(b) If "No," are you aware of the program?

9. Does your child development program offer the following types of service?

- | | |
|---|--|
| <input type="checkbox"/> (a) Full-time Care (35 or more hrs/wk) | <input type="checkbox"/> (i) Before School, if yes see 7(b) |
| <input type="checkbox"/> (b) Part-time Care (Less than 35 hrs/wk) | <input type="checkbox"/> (j) After School (after 3:00 p.m.), if yes see 7(c) |
| <input type="checkbox"/> (c) Evening Care, if yes see 7(a) | <input type="checkbox"/> (k) Full-Day During School Closing |
| <input type="checkbox"/> (d) Overnight Care | <input type="checkbox"/> (l) Mildly Ill or Sick Children |
| <input type="checkbox"/> (e) Saturday | <input type="checkbox"/> (m) Children with Disabilities |
| <input type="checkbox"/> (f) Sunday | <input type="checkbox"/> (n) Emergency or Back-up Care |
| <input type="checkbox"/> (g) Holiday | <input type="checkbox"/> (o) Transportation |
| <input type="checkbox"/> (h) Drop-in | |

10.(a) Indicate the time service begins.

- | | HH | MM | AM/PM |
|---------------------------------|----------------------|------------------------|----------------------|
| (a) Evening Care | <input type="text"/> | : <input type="text"/> | <input type="text"/> |
| (b) Before School | <input type="text"/> | : <input type="text"/> | <input type="text"/> |
| (c) After School (after 3:00PM) | <input type="text"/> | : <input type="text"/> | <input type="text"/> |

10.(b) Indicate the time service ends.

- | | HH | MM | AM/PM |
|---------------------------------|----------------------|------------------------|----------------------|
| (a) Evening Care | <input type="text"/> | : <input type="text"/> | <input type="text"/> |
| (b) Before School | <input type="text"/> | : <input type="text"/> | <input type="text"/> |
| (c) After school (after 3:00PM) | <input type="text"/> | : <input type="text"/> | <input type="text"/> |

11. How many days per year is your program closed for the following?

- | | |
|--------------------|----------------------|
| (a) Holidays | <input type="text"/> |
| (b) Vacation | <input type="text"/> |
| (c) Staff Training | <input type="text"/> |
| (d) Other | <input type="text"/> |

2010 MARKET RATE AND CAPACITY SURVEY: UDC/CARUP

12.(a) Does your program have a contract or provider agreement with the Child Care Subsidy Program? If yes, at what level is your program.

- (a) NO (b) YES, Bronze (c) YES, Silver (d) YES, Gold

12.(b). How many slots are currently being used by the Child Care Subsidy Program?

13. Do you offer other types of fee reductions to help low-income families afford your services? Check all that apply.

- (a) NO
 (b) YES, Sliding fee based on family income
 (c) YES, Scholarships
 (d) YES, Other (please specify)

14. What is the total number of children enrolled whose charges are paid for fully or in part by subsidies, government funds, or another agency?

15. Do you provide information to parents about government subsidies for child care?

- YES NO

16. Has your program recently provided care to a child with a disability?

- No Yes, Currently Yes, during the past 3 years

2010 MARKET RATE AND CAPACITY SURVEY: UDC/CARUP

THE FOLLOWING QUESTIONS RELATE TO THE NUMBER OF CHILDREN YOU SERVE AND YOUR RATES. QUESTIONS ABOUT FULL-TIME CARE AND PART-TIME CARE FOR CHILDREN ARE BEING ASKED SEPARATELY. FULL-TIME CARE IS 35 HOURS A WEEK OR MORE; PART-TIME CARE IS LESS THAN 35 HOURS A WEEK.

17. What are the FULL TIME (35 hours or more per week) and PART TIME (less than 35 hours per week) enrollment in your program for each of the following age groups?

	Current Full Time Enrollment	Current Part Time Enrollment
(a) Infants	<input type="text"/>	<input type="text"/>
(b) Age 1	<input type="text"/>	<input type="text"/>
(c) Age 2	<input type="text"/>	<input type="text"/>
(d) Age 3	<input type="text"/>	<input type="text"/>
(e) Age 4	<input type="text"/>	<input type="text"/>
(f) Age 5	<input type="text"/>	<input type="text"/>
(g) Ages 6 through 12	<input type="text"/>	<input type="text"/>
(h) Ages 13 through 18	<input type="text"/>	<input type="text"/>

18. How many children with disabilities do you currently serve for both Full Time and Part Time? If no children with disabilities, go to Question 19.

	Full Time Enrolled Children with Disabilities	Part Time Enrolled Children with Disabilities
(a) Infants	<input type="text"/>	<input type="text"/>
(b) Age 1	<input type="text"/>	<input type="text"/>
(c) Age 2	<input type="text"/>	<input type="text"/>
(d) Age 3	<input type="text"/>	<input type="text"/>
(e) Age 4	<input type="text"/>	<input type="text"/>
(f) Age 5	<input type="text"/>	<input type="text"/>
(g) Ages 6 through 12	<input type="text"/>	<input type="text"/>
(h) Ages 13 through 18	<input type="text"/>	<input type="text"/>

19. How are your FULL-TIME rates charged? If No Children FULL-TIME, Go to question 22.

- (a) Hourly
 (b) Daily
 (c) Weekly
 (d) Monthly
 (e) Yearly

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20. What do you charge for FULL-TIME care for each of the following age groups?

(a) Infants	<input type="text"/>
(b) Age 1	<input type="text"/>
(c) Age 2	<input type="text"/>
(d) Age 3	<input type="text"/>
(e) Age 4	<input type="text"/>
(f) Age 5	<input type="text"/>
(g) Ages 6 through 12	<input type="text"/>
(h) Ages 13 through 18	<input type="text"/>

21. Please estimate by age group the number of FULL-TIME hours the typical child attends your program(Please fill in columns by hour, day, AND month for ages that apply only):

	Hours Per Day	Days Per Week	Months Per Year
(a) Infants	<input type="text"/>	<input type="text"/>	<input type="text"/>
(b) Age 1	<input type="text"/>	<input type="text"/>	<input type="text"/>
(c) Age 2	<input type="text"/>	<input type="text"/>	<input type="text"/>
(d) Age 3	<input type="text"/>	<input type="text"/>	<input type="text"/>
(e) Age 4	<input type="text"/>	<input type="text"/>	<input type="text"/>
(f) Age 5	<input type="text"/>	<input type="text"/>	<input type="text"/>
(g) Ages 6 through 12	<input type="text"/>	<input type="text"/>	<input type="text"/>
(h) Ages 13 through 18	<input type="text"/>	<input type="text"/>	<input type="text"/>

22. How are your PART-TIME rates charged? If No Children Enrolled PART-TIME, Go to Question 26.

(a) Hourly
 (b) Daily
 (c) Weekly
 (d) Monthly
 (e) Yearly

23. What do you charge for PART-TIME care for each of the following age groups?

(a) Infants	<input type="text"/>
(b) Age 1	<input type="text"/>
(c) Age 2	<input type="text"/>
(d) Age 3	<input type="text"/>
(e) Age 4	<input type="text"/>
(f) Age 5	<input type="text"/>
(g) Ages 6 through 12	<input type="text"/>
(h) Ages 13 through 18	<input type="text"/>

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24. Please estimate the number of hours by day, week, AND month that the typical child attends your PART-TIME program: (Answer for ages that apply only).

	Hours per Day	Days per Week	Months per Year
(a) Infants	<input type="text"/>	<input type="text"/>	<input type="text"/>
(b) Age 1	<input type="text"/>	<input type="text"/>	<input type="text"/>
(c) Age 2	<input type="text"/>	<input type="text"/>	<input type="text"/>
(d) Age 3	<input type="text"/>	<input type="text"/>	<input type="text"/>
(e) Age 4	<input type="text"/>	<input type="text"/>	<input type="text"/>
(f) Age 5	<input type="text"/>	<input type="text"/>	<input type="text"/>
(g) Ages 6 through 12	<input type="text"/>	<input type="text"/>	<input type="text"/>
(h) Ages 13 through 18	<input type="text"/>	<input type="text"/>	<input type="text"/>

25. Do families using PART-TIME care have to pay for a minimum number of hours?

Yes

No

If yes, what is the minimum number of hours

26.(A) Do you have additional charges for the following services? If NO, go to Question 27:

(a) No

(b) Yes, Summer

(c) yes, Before/After Services

26.(B) Please indicate the rate (\$___per___).

(a) Summer

(b) Before/After Services

27.(A) If you offer both traditional hours and nontraditional hours, do you charge different rates for: If No, Go to question 28.

(a) NO

(d) Yes, Evening Care

(b) Yes, Overnight

(e) Yes, Extended Hours

(c) Yes, Weekend

27.(B) If Yes to Question 27A, Please indicate the rate (\$___per___).

(a) Overnight

(b) Weekend

(c) Evening Care

(d) Extended Hours

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28. How many school age children (ages 4 years and older) did you serve FULL-TIME (35 hours or more per week) during the last time school was not in session: e.g., school breaks, school vacations, or summers? IF NONE, GO TO QUESTION 30.

29. What do you charge for FULL-TIME care when school is not in session for children ages 4 years and older? (Specify \$__per__).

30. Does your program have a waiting list? IF NO, GO TO QUESTION 32.

Yes

No

31. How many children are currently on your waiting list for each of the following age groups?

(a) Infants	<input type="text"/>
(b) Age 1	<input type="text"/>
(c) Age 2	<input type="text"/>
(d) Age 3	<input type="text"/>
(e) Age 4	<input type="text"/>
(f) Age 5	<input type="text"/>
(g) Ages 6 through 12	<input type="text"/>
(h) Ages 13 through 18	<input type="text"/>

32. How much do you charge, if anything, for the following services?

(a) Registration	<input type="text"/>
(b) Supplies	<input type="text"/>
(c) Activities/Programs	<input type="text"/>
(d) Meals	<input type="text"/>
(e) Liability Insurance	<input type="text"/>
(f) Transportation	<input type="text"/>
(g) Late Fees	<input type="text"/>
(h) Other (Identify)	<input type="text"/>

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33. From which of the following sources do you receive revenue?

- (a) Federal Government grants
- (b) District Government Grants
- (c) Private Grants (foundations, businesses, etc.)
- (d) Fund Raising Activities
- (e) Agency Reimbursements (incl. CACFP, subsidies, etc.)
- (f) Parent Charges
- (g) Other (please specify)

34. Do you receive non-cash contributions on a regular basis for any of the following?

- (a) Equipment
- (b) Rent
- (c) Food
- (d) Utilities
- (e) None

35. Please identify any other contributions which support your program.

THE NEXT GROUP OF QUESTIONS RELATE TO PROGRAM AND STAFF.

36. Is your program professionally accredited? If yes, identify accrediting body and skip to Question 38.

- (a) Not accredited, go to question 37
- (b) National Association for Education of Young Children (NAEYC)
- (c) Council on Accreditation (COA)
- (d) National Association for Family Child Care (NAFCC)
- (e) National AfterSchool Association (NAA)
- (e) Other (please specify)

37.(A) If your program is not currently accredited, identify current status:

(a) Have filed with

(b) Am preparing to apply with

Other, please identify below

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37.(B) If your program is not currently accredited, what assistance would you need to become accredited?

- (a) Mentor
 (c) Additional Information
 (b) Assistance with Fees
 (d) Don't intend to apply

38. Using the following categories, how many people, including yourself work in your program on a normal day? Please place each employee in one category only.

	Full - Time	Part - Time
(a) Administrator Only	<input type="text"/>	<input type="text"/>
(b) Administrator/Teacher	<input type="text"/>	<input type="text"/>
(c) Teacher	<input type="text"/>	<input type="text"/>
(d) Assistant Teacher	<input type="text"/>	<input type="text"/>
(e) Classroom Aide	<input type="text"/>	<input type="text"/>
(f) Other	<input type="text"/>	<input type="text"/>

Please specify below

39. How long has the typical employee served in their current position?

- (a) Administrator Only
 (b) Administrator/Teacher
 (c) Teacher
 (d) Assistant Teacher
 (e) Classroom Aide
 (f) Other

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40. On a scale of 1 (no challenge) to 5 (a big challenge), rate how the following issues affect recruiting and retaining staff at all levels.

	No Challenge	Little Challenge	Some Challenge	More Challenge	Big Challenge	N/A
(a) High competition with other employers	<input type="radio"/>					
(b) Lack of availability of qualified people who meet acceptable standards	<input type="radio"/>					
(c) Site location is undesirable	<input type="radio"/>					
(d) Hours are too long or inconvenient	<input type="radio"/>					
(e) Lack of advancement opportunities	<input type="radio"/>					
(f) The stress of the job	<input type="radio"/>					
(g) Low pay	<input type="radio"/>					
(h) Inadequate benefits	<input type="radio"/>					
(i) Other challenge	<input type="radio"/>					

Please specify below

41. Identify the number of employees in each category who are CDA-certified.

(a) Administrator Only	<input type="text"/>
(b) Administrator/Teacher	<input type="text"/>
(c) Teacher	<input type="text"/>
(d) Assistant Teacher	<input type="text"/>
(e) Classroom Aide	<input type="text"/>
(f) Other	<input type="text"/>

42. Identify the number of employees in each category by the HIGHEST degree.

	H.S./GED	Associate	Bachelors	Masters or Higher
(a) Administrator Only	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
(b) Administrator/Teacher	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
(c) Teacher	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
(d) Assistant Teacher	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
(e) Classroom Aide	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
(f) Other	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
(g) Total Degrees in Early Childhood Education	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
(h) Total Degrees in Related Fields	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Please Identify Related Fields

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43. What is the average number of clock hours spent this past year in staff training for each category of employee? Clock hours include training during work hours and training during non-work hours. (Include staff enrolled in college courses, CDA training, etc.)

	College Classes	CDA Training	Training with focus on Disability	Other
(a) Administrator Only	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
(b) Administrator/Teacher	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
(c) Teacher w/Bachelors Degree or higher	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
(d) Teacher with CDA	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
(e) Assistant Teacher	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
(f) Classroom Aide	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
(g) Other	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Please identify Other types of training on the space provided below

44. Who pays for training?

(a) Employer

(b) Employee

(c) Other (please specify)

45. Is the Director generally aware of employees' outside training?

Yes

No

46. Does your facility have a working computer with access to the internet?

Yes

No

47. How often do the following concerns affect the ability of you and your staff to obtain training?

	Always an Issue	Sometimes an Issue	Never an Issue
(a) Cannot afford training costs (e.g. registration fees)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
(b) Staff are not paid for the time they spending training	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
(c) Staff are not interested in training beyond the required 6 hours	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
(d) Training opportunities are not accessible	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
(e) Training is too elementary	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
(f) Lack of funding for substitutes to replace those attending training	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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48. Which of the following benefits, if any, are provided to full-time employees in your program?

- | | |
|---|--|
| <input type="checkbox"/> (a) Health Insurance | <input type="checkbox"/> (e) Paid Sick Leave |
| <input type="checkbox"/> (b) Life Insurance | <input type="checkbox"/> (f) Paid Vacation |
| <input type="checkbox"/> (c) Disability Insurance | <input type="checkbox"/> (g) None |
| <input type="checkbox"/> (d) Retirement Plan | |
| <input type="checkbox"/> (h) Other, Please Identify | |
-

49. Are Benefits offered to part-time employees?

- Yes No

50. Approximately what percentage of salaries is your benefit package?

51. What percentage of employees participate in benefits offered?

52. How are salaries calculated for each category of employee?

(a) Administrator Only	<input type="text"/>
(b) Administrator/Teacher	<input type="text"/>
(c) Teacher	<input type="text"/>
(d) Assistant Teacher	<input type="text"/>
(e) Classroom Aide	<input type="text"/>
(f) Other	<input type="text"/>
Other (please specify)	<input type="text"/>

53.(A) What is the beginning salary paid for each category of employee?

(a) Administrator Only	<input type="text"/>
(b) Administrator/Teacher	<input type="text"/>
(c) Teacher with Bachelor's Degree or Higher	<input type="text"/>
(d) Teacher with CDA	<input type="text"/>
(e) Assistant Teacher	<input type="text"/>
(f) Classroom Aide	<input type="text"/>
(g) Other	<input type="text"/>

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53.(B) What is the salary paid an employee with 5 years experience?

- (a) Administrator Only
- (b) Administrator/Teacher
- (c) Teacher with Bachelor's Degree or Higher
- (d) Teacher with CDA
- (e) Assistant Teacher
- (f) Classroom Aide
- (g) Other

54. On what basis are salaries adjusted?

- (a) Merit (b) Cost of Living
- (c) Other (Identify)
-

55. How many hours per week and weeks per year does the typical employee work?

	Hours per week	Weeks per year
(a) Administrator Only	<input type="text"/>	<input type="text"/>
(b) Administrator/Teacher	<input type="text"/>	<input type="text"/>
(c) Teacher with Bachelor's Higher	<input type="text"/>	<input type="text"/>
(d) Teacher with CDA	<input type="text"/>	<input type="text"/>
(e) Assistant Teacher	<input type="text"/>	<input type="text"/>
(f) Classroom Aide	<input type="text"/>	<input type="text"/>
(g) Other	<input type="text"/>	<input type="text"/>

Please identify below

56. How difficult is it for you to make ends meet to keep your child care activity going?

- (a) Very Difficult (b) Somewhat Difficult (c) Not at all difficult

THE FINAL QUESTIONS RELATE TO SCHOOL AGE OUT-OF-SCHOOL-TIME ACTIVITIES

57. Do you have special programs for school age children outside of normal school hours? If No, Go to Question 61.

- Yes No

58. If yes to Question 57, what time of day are the programs offered?

- (a) Before School (b) After School (c) Summer

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59. Indicate the number of school age children who participate in the following activities. If NONE, enter zero.

(a) Tutoring	<input type="text"/>
(b) Homework Assistance	<input type="text"/>
(c) Academic Enrichment	<input type="text"/>
(d) Computer Training	<input type="text"/>
(e) Health/Nutrition	<input type="text"/>
(f) Aerobics/Exercise	<input type="text"/>
(g) Sports	<input type="text"/>
(h) Gymnastics	<input type="text"/>
(i) Swimming	<input type="text"/>
(j) Arts and Crafts	<input type="text"/>
(k) Field Trips	<input type="text"/>
(l) Music	<input type="text"/>
(m) Dance	<input type="text"/>
(n) Drama	<input type="text"/>
(o) Games	<input type="text"/>
(p) Bowling	<input type="text"/>
(q) Skating	<input type="text"/>
(r) Other	<input type="text"/>

60. Please indicate other charges applicable to your program? (\$__per__).

(a)Registration	<input type="text"/>
(b)Supplies	<input type="text"/>
(c)Snacks	<input type="text"/>
(d)Transportation	<input type="text"/>
(e)Insurance	<input type="text"/>
(f)Other	<input type="text"/>

61. If the District Government were to take additional action related to early childhood services, what would you advise them to do? List maximum of 3 priorities.

Priority 1	<input type="text"/>
Priority 2	<input type="text"/>
Priority 3	<input type="text"/>

63. What is your zip code?