2012 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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A number of persons facilitated our effort in implementing the study. Staff in the Office of the State Superintendent of Education and the Washington Child Development Council provided invaluable support throughout this project. Many licensed family home providers and child care center providers gave of their time and energy to participate in this project and to encourage others to participate. This report would not have been possible without their willing support, participation, and advice. We give our sincere appreciation and gratitude to all of them.

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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, who are 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.

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

OSSE contract providers - are licensed child development centers and/or licensed child development homes that have a contract with the Office of the State Superintendent of 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 national accreditation and compliance with licensing regulation.

EXECUTIVE SUMMARY

Overview. The Child Care Market Rate Survey and Capacity Utilization (MRS): A Study of Licensed Family Home and Child Care Center Providers in the District of Columbia have been conducted since 1998. In 2012, 106 family home providers (FHP) and 237 child care center providers (CP) totaling 343 respondents participated. Completed survey interviews represents 78% of the 136 active FHPs and 71% of the 335 active CPs contacted.

Market Rates.* OSSE-contract center provider daily rates are significantly lower than private center provider rates across all age groups as reflected in the charts. Rates for infants are approximately $26 lower, toddlers are $22 lower, and pre-schoolers are $19 lower. Enrollment at OSSE providers is approximately 50% higher across all age groups than private providers (*see* chart below). Findings suggest that OSSE-contract center enrollment may be higher due to lower rates when compared to private providers.

2012 annual child care cost of $39,252 equals 62% of the 2011 median household income in the District of Columbia. The comparative cost for a family at a center participating in the Child Care Subsidy Program is $27,444 per year or 44% of the 2011 median household income. Thus, there continues to be a critical need for affordable, quality child care and early education options throughout the city.

Capacity Utilization. 79% for private centers and 76% at OSSE-contract centers are operating at their licensed capacity utilization of child care slots. OSSE subsidized family home providers utilize 81% of capacity compared to 74% by private providers. Findings suggest that OSSE contractors are on par with private contractors in terms of capacity utilization.

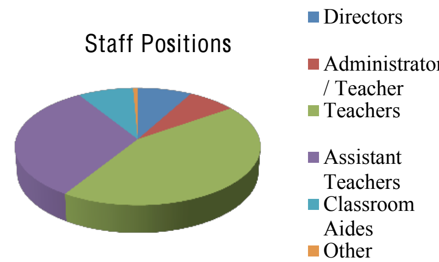
Retention of Child Care Facilities. There was a decrease of CPs in 4 of the 8 wards; however Wards 2, 5, 6, and 7 experienced a net growth. All wards, except Ward 5, experienced a decline in the number of FHPs. Fifty-six (56) of the CPs in the 2010 MRS study were no longer licensed in 2012; however, this was offset, by the addition of 58 newly licensed child care centers and 38 newly licensed family homes. Contributing factors related to turnover and retention include: 1) licensing renewal processes; 2) perception of low subsidy rate; and 3) OSSE's policy that limits the number of slots for infants & toddlers.

Waiting Lists. 9,714 children are on provider waiting lists of which the largest population is children ages 0-3 years (8,456 or 77%). Despite 4,000 open child care slots citywide, the distribution is not geographically available according to demand and need.

Children with Disabilities. 9% of family home providers and 22% of centers have children with disabilities currently enrolled, despite services being available at 42% of homes and 52% of child care centers. Of these children, only 9% have either an IEP* or IFSP.

*Rates are calculated at the 75th percentile.

Staffing Patterns. Child care center providers responding to the survey employed 3,473 workers of which 91% of them are directly involved with children in the classroom; at similar ratios 3.4 to 1 (Private Rate) and 3.8 to 1 (OSSE rate).



Training. The average annual training hours in all categories among center based employees increased with the highest increase occurring among classroom aides from 7 in 2010 to 32 in 2012. This increase may be a result of the associated value and professional development/growth that training provides for the classroom aides. **Obstacles to Training.** Three major obstacles to employee participation in training are: 1) lack of funds for substitutes (61%); 2) unpaid time (56%); and 3) lack of accessibility (49%).

Compensation. Salaries for all employee positions of private providers are higher than OSSE contract child care providers, with Directors** at 20% higher.

Provider Revenue Sources. Both FHPs (68%) and CPs (76%) charge fees for late pick-up of children. 58% of FHPs and 57% of CPs charging fees, charge by the minute. This should be considered a significant finding for OSSE, as it may reflect how OSSE contractor providers utilize fees as revenue in order to offset the low subsidy rate.

Provider Accreditation Status. 40% of private child care centers are accredited compared to 29% of OSSE child care centers; a slight increase since 2010 (39 % and 24%). The top two professional accreditation challenges are: 1) assistance with fees (49%); and 2) mentoring (40%). Approximately 39% of FHPs and 16% of CPs indicated that they "do not intend to apply" for accreditation. Finding suggests that child care center providers may perceive their affiliation with an accredited organization as more valuable and credible than family home providers.

Provider Difficulties. 19% of FHPs and 31% of CPs find it "very difficult" to adequately fund their programs.

Provider Challenges. Top three challenges in recruiting and retaining staff are: 1) low salaries, 2) inadequate benefits, and 3) employer hiring competition.

Provider Recommendations and Priorities. *OSSE Child Care Providers*: Increase subsidy reimbursement rate and increase benefits to staff and teachers. *Private Child Care Providers*: Streamline licensing, immunization verification and renewal processes and Increase the number of infant and toddler slots. *All Providers:* More training opportunities.

**Data calculated for center providers only.

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 (OSSE) 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 final 2012 data from the eighth biennial market rate survey and provides additional information on educational level of providers, compensation, revenue, and accreditation status of 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 105,334 in 2011. Approximately 36,163 of the children were ages 0 through 4 and 47,567 were ages 5 through 13 for a total of 83,730 children ages 0 through 13 in 2011. The total estimated population increased from 604,453 in 2010 to 617,996 in 2012. While there was a net growth of 2.2 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 2011).

According to the 2011 American Community Survey's 1-year estimates, the median household income in the District of Columbia is $63,124. Twenty five percent (25%) of the population lives in poverty. The city's population of children from 0-17 years comprises 105,334 children or 18% of the residents, and 44,600 or 41% of these children live in households living in poverty. The District of Columbia's eligibility threshold for participation in the Child Care Subsidy Program is 250 percent of the poverty level.

The US Census, Current Population Survey, reports that in 2011 25 percent of the city's children live in families with incomes 100 percent below the federal poverty level; 6 percent in families 138 percent below the poverty level; and 14 percent in families 250 percent of the poverty level.

The quality and cost of child care are enduring issues in the District of Columbia, as well as in other urban areas. Using the 2012 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 rates* for care:

Infant	(@ $84.48 per day or $1829 per month*)	$21,948
Preschool	(@ $66.60 per day or $1,442 per month*)	$17,304
Total 2012 Annual Child Care Cost		$39,252

The total 2012 Annual Child Care Cost is $39,252 which equals 62 percent of the 2011 median household income in the District of Columbia. The comparative cost for a family at a center participating in the Child Care Subsidy Program is $27,444 per year or 44percent of the 2011 median household income.

The cost of center based child care has increased nationwide over the past decade. Other studies affirm the findings of the 2012 market rate study. According to the Child Care Aware of America (formerly NACCRRA) the average cost, in Washington, D.C. in 2011, for full-time infant care at a center provider was $20,178 annually (2012). Our study finds that the annual cost for infants is $18,528 ($21,948 at private providers and $15,240 at OSSE providers) in Washington, D.C; the annual cost of child care is equivalent to tuition for public, four-year universities. In order to obtain a more accurate understanding of child care rates in the District of Columbia, it is necessary to compare child care rates against neighboring counties, specifically: Prince Georges County, Montgomery County (Maryland) and Fairfax (Virginia). The counties represented below can be considered similar to the District in terms of urban demographics, income and population density.

Family Home Provider: Jurisdiction Weekly Rate Comparison

	DC*		MD-PG County*		MD-Montgomery*		VA-Fairfax	
	Market	Subsidy	Market	Subsidy	Market	Subsidy	Market	Subsidy
Infants	$298	$227	$183	$141	$235	$179	$195 - 225	$185
Toddlers	$251	$201	$152	$111	$199	$149	$185 - 200	$175
Preschool	$253	$198	$152	$111	$199	$149	$170 - 200	$165

Center Provider: Jurisdiction Weekly Rate Comparison

	DC*		MD-PG County*		MD-Montgomery*		VA-Fairfax	
	Market	Subsidy	Market	Subsidy	Market	Subsidy	Market	Subsidy
Infants	$422	$293	$227	$195	$319	$252	$285 - $319	$280
Toddlers	$378	$268	$166	$124	$244	$166	$266 - $305	$225
Preschool	$329	$233	$166	$124	$244	$166	$231 - $259	$235

*Rates calculated at the 75th percentile

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 2010 market rate survey estimated the median annual salary for a child care teacher with a bachelor's degree at $30,000 and a classroom aide at $18,360. Approximately 32.5 percent of the center-based workforce also received no health insurance benefits and 54.7 percent received no retirement benefits in 2010. The 2012 data show little improvement in annual salaries: $31,200 for a teacher with a bachelor’s degree; and $18,720 for a classroom aide. As reflected in previous market rate surveys, there continues to be a decline in employee benefits since 2006. Based on providers’ responses, 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 has undertaken initiatives to improve child care services using data from the previous market rate 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;
- 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 telephone, in-person, email, and mail surveys of licensed child care family home providers and licensed child care 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 private 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 eighth 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. Consultations were conducted with researchers, providers, and public officials in the District of Columbia prior to developing the survey instrument.

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 2012 list of licensed providers was obtained from the OSSE and included 150 names, addresses, email, and telephone numbers for family child care homes and 339 names, addresses, email, 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 prior code numbering system.

Survey Instrument

The survey instrument used in the 2012 study was slightly modified from the 2010 version. Adjustments to the previous survey instrument were made after a review of the CCDF and consultations with OSSE. In brief, the survey modifications included: program services targeted to children with disabilities and the number of children with IEP and IFSP; staff average time in position; number of employees hired/left program; and highest level of education among program staff.

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 mailed to all providers and follow-up telephone calls were made to both centers and homes. The majority of the surveys were conducted via phone; 40 minutes for centers and 20 minutes for homes.

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/UDC attended meetings of the Washington Association of Child Care Centers (WACC).

OSSE and CARUP mailed letters explaining the survey objectives and process to the 489 child care providers at the addresses provided by the Child Care Licensing Unit. For letters returned undelivered, the provider name was cross-checked with OSSE 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, and role playing.

Survey data collection was launched in June 2012 and ended September 2012. 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 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.

A copy of survey instrument was mailed to the 342 child care center providers and 150 family home providers. Follow up telephone calls and in-person visits were made to all family home and 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 492 providers on the original list, 4.3 percent were either no longer in business (or, in the case of child care centers, absorbed into other active sites), had disconnected or non-working telephone numbers, or had wrong numbers where valid telephone numbers could not be found. This represents 1.4 percent of licensed child care center providers and 2.9 percent of licensed family home providers. Therefore, as shown in Table 1 below, the pool of active licensed providers operating in the District of Columbia was reduced to 471 providers, consisting of 136 family home providers and 335 child care center providers.

Table 1

Survey Response Rates

Provider Status	Family Home Providers No. (%)		Child Care Center Providers No. (%)		Total Providers No. (%)	
	2010	2012	2010	2012	2010	2012
Licensed Providers*	156	150	330	342	486	492
No Longer in Business	16 (10.3%)	5 (3.3%)	3 (1.0%)	7 (2.1%)	19 (3.9%)	12
Disconnected/Non-working Telephone	4 (2.7%)	7 (4.7%)	3 (1.0%)	0	7 (1.4%)	7
Wrong Number (no new number found)	7 (19.5%)	2 (1.3)	6 (2.0%)	0	13 (2.7%)	2
Duplicate Listings	1 (0.6%)	0	0	0	1 (0.2%)	0
Total Active Licensed Providers	128	136	318	335	446	471
Refusals	10 (7.8%)	5 (3.7%)	23 (7.0%)	16 (4.8%)	33 (7.4%)	21 (4.5%)
No Answer/No Response	25 (19.5%)	25 (18.4%)	74 (23.0%)	82 (24.5%)	99 (22.2%)	107 (23.1%)
Completed Interviews	93 (72.7%)	106 (78.4%)	221 (69.5%)	237 (70.7)	314 (70.4%)	343 (72.8%)

*Source: Office of the State Superintendent of Education 2/10 and 5/12.

In 2012, CARUP completed interviews with 78.4 percent of the 136 active family home providers and 70.7 percent of the 335 active child care center providers. The response rate for the overall survey was 72.8 percent, representing 106 active family home providers and active 237 child care center providers for a total of 343 interviews (*see* Table 1 above). Overall, Table 1 reflects a slight increase (6 percentage points) among family home providers, in the Year 2012 response rates in comparison to the 2010 response rates. The 2012 response rate for total providers (family home and center) was similar to that of 2010. Refusals included providers who cited time constraints and those who believed that the survey results on rates would not be used to establish new reimbursement rates. A complete list of non-respondents, by ward, can be found in Appendix A.

Survey Demographics

Family home providers are licensed for a maximum of up to six children, depending on the

ages of the children and space. More than half (55.7 percent) of the family home survey respondents are OSSE contract providers, and 44.4 percent are private providers.
Among child care center providers, 33.2 percent of the survey respondents are private providers and 67.7 percent of survey respondents are OSSE contract providers.

The survey respondents represent providers from all areas of the city. The distribution of survey responses by ward is presented below in Table 2.

Table 2

Location of Survey Respondents by Ward

Ward*	Family Home Providers No. (%)		Child Care Center Providers No. (%)		Total Providers No. (%)	
	2010	2012	2010	2012	2010	2012
Ward 1	2 (2.2%)	4 (3.8%)	23 (10.4%)	24 (10.1%)	25 (8.0%)	28 (8.2%)
Ward 2	2 (2.2%)	2 (1.9%)	49 (22.2%)	36 (15.2%)	51 (16.2%)	38 (11.1%)
Ward 3	3 (3.2%)	2 (1.9%)	18 (8.1%)	21 (8.9%)	21 (6.7%)	23 (6.7%)
Ward 4	15 (16.1%)	17 (16%)	24 (10.9%)	29 (12.2%)	39 (12.4%)	46 (13.5%)
Ward 5	14 (15.1%)	21 (19.8%)	27 (12.2%)	28 (11.8%)	41 (13.1%)	49 (14.4%)
Ward 6	12 (12.9%)	15 (14.2%)	31 (14.0%)	26 (10.9%)	43 (13.7%)	41 (12.0%)
Ward 7	22 23.7%)	27 (25.5%)	20 (9.0%)	34 (14.3%)	42 (13.4%)	60 (17.6%)
Ward 8	23 (24.7%)	18 (16.9%)	29 (13.1%)	39 (16.5%)	52 (16.6%)	56 (16.4%)
Total	93 (100%)	106 (100%)	221 (100%)	237 (100%)	314 (100%)	343 (100%)

*Source: Ward designation provided by the Office of the State Superintendent of Education 2/10 and 5/12

Survey Data Analysis

CARUP staff entered the survey data using SPSS 20.0 software for data analysis. Case summaries, frequencies, descriptive statistics, cross tabulations, and ANOVA statistics were used to analyze data for this report. Every effort was taken to clean the data to reflect in the data analysis in this final 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 private providers with no OSSE contracts to provide child care services for eligible children under the Child Care Subsidy Program; OSSE contract providers with OSSE contracts to provide child care services for eligible children under the Child Care Subsidy Program; and for total providers including both private providers and OSSE contract providers.

CARUP, using SPSS 20.0 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 child care slots were computed separately from rates offered by family home providers and child care centers. Also, providers were divided into two groups: (1) private providers, defined as those without OSSE subsidy contracts; and (2) providers with OSSE subsidy contracts. 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 4.12 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 80.2 percent of family home providers classify themselves as "for profit" providers and 8.5 percent are 23-hour providers. There was a decline in the number of family home providers self-identifying as "a part of a Child Care system" in 2010 from 2.2 percent to 0.9 percent. However, since 2010 there was an increase of 23-hour providers from 1.1 percent to 8.5 percent.

While 52.8 percent of child care centers are nonprofit providers, an increasing number of centers (38.7 percent), self-identify as "for profit". There was a decline in child care centers that are "part of a child care system" from 9.9 percent in 2010 to 2.6 percent in 2012. The decline in centers identifying as "part of a Child Care system" is largely attributable to a 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.

TABLE 3

TYPES OF PROVIDERS*

Type	% of Family Home Providers		% of Child Care Center Providers	
	2010	2012	2010	2012
For Profit Provider	82.8%	80.2%	30.7%	38.7%
Nonprofit Provider	16.1%	5.7%	63.2%	52.8%
No Response	1.7%	14.1%	6.1%	8.5%
Total	100%	100%	100%	100%

**Providers self-identified their type in the 2010 and 2012 Market Rates and Capacity Utilization Surveys.*

Days and Hours of Operation

Approximately 97.6 percent of child care providers operate their services Monday through Friday. Thirteen percent of family home providers and 3.4 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. Ninety-three percent of family home providers and 89.3 percent of child care center providers operate between 9 and 12 hours per day.

Additionally, 27.4 percent of family home providers and 11.5 percent of child care center providers operate more than 12 hours per day. Similar percentages were reported for those providers offering nontraditional hours of care (evening, overnight and/or weekend care. Most providers operate on a 7:00 a.m. to 6:00 p.m. schedule.

As shown in Table 4, while all providers offering nontraditional hours of care are distributed throughout the city, except Ward 1, this type of service is more readily available in Wards 7 and 8. No licensed family home providers in Wards 1, 2, and 3 currently offer nontraditional hours of care.

Table 4

PERCENT OF PROVIDERS OFFERING NONTRADITIONAL HOURS BY WARD

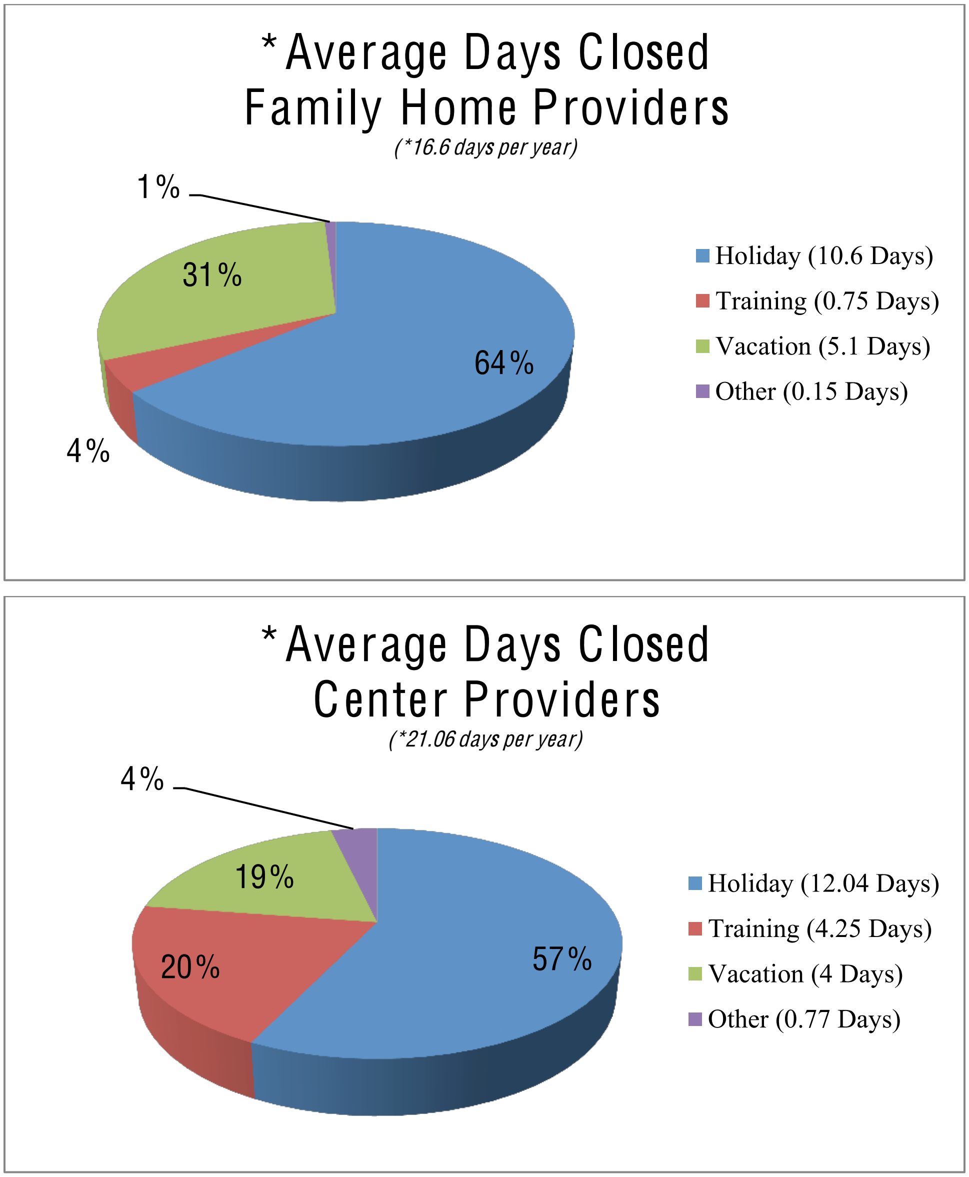
Ward	% of Family Home Providers	% of Child Care Center Providers
Ward 1	0.0%	0.0%
Ward 2	0.0%	0.8%
Ward 3	0.0%	0.4%
Ward 4	2.7%	2.1%
Ward 5	3.2%	2.6%
Ward 6	4.1%	1.8%
Ward 7	8.1%	2.1%
Ward 8	7.2%	2.1%

Source: 2012 Market Rate Survey

Most child care centers (98.3 percent) operate 12 months per year. Less than 2 percent of centers operate 9 months or less per year or 10 to 11 months per year. Most family home providers (98.1 percent) operate 12 months per year.

Family home providers are closed an average of 16.6 days per year and child care centers are closed an average of 21.06 days per year. This represents an average decrease of 5 days of available child care for family homes and 1.5 days for centers in 2012; this decrease is similar to that of 2010. As Figure 1 shows, family home providers are closed more often for vacation days, while center providers are closed more days for holidays and training.

Figure 1
Average Days Closed by Provider Type



Source: 2012 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 93.4 percent of family home providers and 84.7 percent of center-based providers, while part-time services are available from 42.5 percent of family homes and 44.5 percent of centers. Evening, overnight, Saturday, and Sunday care is limited at child care centers. While Saturday care is available at 13.2 percent of family home providers and 3.4 percent of centers, few child care providers offer regular Saturday hours.

Overall, family home providers are more likely than center providers to offer a variety of child care services; however, their (family home provider) capacity is very limited. Services for children with disabilities are available at approximately 41.5 percent of family homes and 51.9 percent of child care centers. The percentage of centers offering services for children with disabilities increased significantly from an average of 20 percent, in 2010, to 46.7 percent in 2012.

Table 5

Types of Services Offered by Providers

Types of Services	% Family Home Providers	% Child Care Center Providers
Full-time Care, 35 hours per week or more	93.4%	84.7%
Part-time Care, less than 35 hours per week	42.5%	44.5%
Evening Care	27.4%	11.5%
Overnight Care	17.9%	3.4%
Saturday	13.2%	3.4%
Sunday	13.2%	3.0%
Before School	37.7%	40.4%
After School	47.2%	40.0%
Full Day during School Closing	54.7%	40.4%
Drop-In	44.3%	31.3%
Holiday	12.2%	6.0%
Mildly Ill or Sick Children	24.5%	8.5%
Children with Disabilities	41.5%	51.9%
Emergency or Back-Up Care	57.5%	28.1%
Transportation	7.5%	12.8%

Source: 2012 Market Rate Survey

Access to Internet

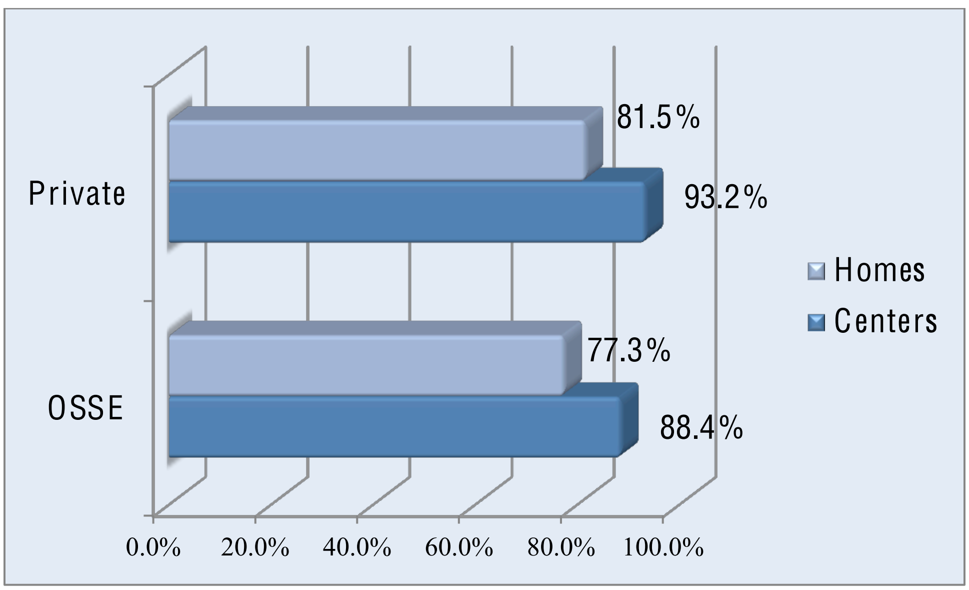
Most child care providers have working computers with access to the internet. Overall, 79.3 percent of family home providers and 92.4 percent of child care center providers have internet access; however, private child care providers (87 percent) are slightly more likely than OSSE contract child care providers (83 percent) to have internet access.

Figure 2 illustrates the percentage of child care providers with working computers with internet access.

FIGURE 2

CHILD CARE PROVIDERS WITH WORKING COMPUTER WITH INTERNET ACCESS (2012)

(CONTRACT TO CONTRACT)



Source: 2012 Market Rate Survey

Number of Employees and Staffing Patterns

Child care center providers responding to the survey employed 3473 workers. Approximately 91.3 percent of employees (including teachers, administrators/teachers, assistant teachers and classroom aides) are directly involved with children in the classroom. As indicated in Table 6, the single largest employee group is teachers (43.6 percent) followed by assistant teachers (32.1 percent).

Table 6

Number of Child Care Center Employees by Position

Job Type	Number of Employees	% of Total Employees
Directors	280	8.0%
Teachers	1515	43.6%
Administrator / Teachers	252	7.3%
Assistant Teachers	1115	32.1%
Classroom Aides	287	8.3%
Other	24	.7%
Total Employees	3473	100.0%

Source: 2012 Market Rate Survey

There were minimal changes in the staffing patterns of both private child care center providers and child care center providers with OSSE contracts since 2010. Overall, the ratio of child to staff declined slightly in all employee categories for both groups. In 2010, child to staff ratio for private providers was 4.0 to 1 compared to 3.4 to 1 in 2012 and for child care center providers with OSSE contracts, it was 4.2 to 1 (in 2010) compared to 3.8 to 1 (in 2012).

Staffing patterns at child care centers are shown in Table 7. Both private providers and OSSE contract providers have similar ratios of children to classroom employees, 3.4 to 1 and 3.8 to 1, respectively. Despite a slight increase from 9.1 to 1 in 2008 to 9.8 to 1 in 2010, the ratio of children to teacher has declined 8.9 to 1 in 2012.

TABLE 7

STAFFING PATTERNS AT CHILD CARE CENTERS

STAFF	PRIVATE PROVIDERS N= 59	OSSE CONTRACT PROVIDERS N= 178	TOTAL PROVIDERS N= 237
Teachers	6.2	6.1	6.3
Administrator / Teachers	1.1	1.0	1.1
Assistant Teachers	4.8	4.6	4.7
Classroom Aides	1.6	1.1	1.2
Directors	1.1	1.1	1.1
Other	.2	.06	.1
Total Employees	15.5	14.3	14.6
Average Number of Children Enrolled	53.1	54.6	53.6
Child : Teacher	8.6:1	8.9:1	8.5:1
Child: Admin. / Teacher	48.2:1	54.6:1	48.7:1
Child : Asst. Teacher	11.1:1	11.9:1	11.4:1
Child : Classroom Aide	33.2:1	49.1:1	44.6:1
Child : Total Classroom Employees	3.4:1	3.8:1	3.7:1

Source: 2012 Market Rate Survey

Education Level

Approximately 62.1 percent of child care center employees and 51.3 percent of family home providers have educational experiences beyond the high school / GED level.

Among family home providers, 43.4 percent have college degrees including: 6.9 percent with the Master's degree or higher, 12.4 percent with the Bachelor's degree, and 24.1 percent with the Associate's degree. Additionally, in 2012 62.8 percent of employees have the Child Development Associate (CDA) certification compared to 54.8 percent in

2010. 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 contracts are more likely to have education beyond high school (65 percent) than are private providers (55 percent).

Education credentials for child care center employees are shown in Table 8. Thirty-one (11.1 percent) directors and three (1.2 percent) administrative/teachers have a Ph.D. Approximately 76.8 percent of directors, 60 percent of administrator/teachers, and 37.8 percent of teachers have a Bachelor's or higher degree. An additional 13.2 percent of directors, 38.9 percent of administrator/teachers and 29.7 percent of teachers have an Associate's degree. There were significant gains, between 2010 and 2012, in the percentage of directors (36.1 percent), administrator/teachers (45.6 percent) who have college degrees. It should be noted that the percentage of teachers with college degrees declined slightly from 2010 (31.7 percent) to 26.2 percent in 2012.

TABLE 8

EDUCATION LEVEL OF CHILD CARE CENTER EMPLOYEES

POSITION	PHD (%)	MASTERS (%)	BACHELORS (%)	ASSOCIATES (%)	CDA (%)
Director *n=280*	11.1%	44.6%	36.1%	13.2%	36.1%
Administrator/ Teacher *n=252*	1.2%	41.7%	45.6%	38.9%	45.2%
Teacher *n=1515*	0.07%	10.9%	26.2%	29.7%	60.4%
Assistant Teacher *n=1115*	0.18%	1.4%	7.6%	14.6%	50.3%
Classroom Aide *n=287*		.7%	3.5%	5.3%	20.6%
Other *n=24*		4.1%	62.5%	25.0%	62.5%
Total *n=3473*	1.1%	11.9%	20.8%	22.7%	50.6%

Source: 2012 Market Rate Survey

As shown in Table 9, there are minimal differences in the education credentials of teachers and other classroom personnel employed by private and OSSE contract child care centers. Teachers at private child care centers are much more likely to have a bachelor's degree or higher (44.8 percent) than are teachers at OSSE contract child care centers (33.6 percent). Although in 2010 the percentage of teachers at OSSE contract child care centers with a CDA was higher than at private child care centers (72.8 percent versus 56.9 percent) in 2012 this gap has been narrowed substantially at 58.8 percent versus 55.6 percent. Teachers with college degrees also have the CDA credential also.

Table 9

Distribution of Teacher Credentials by Tier Level

Position	Private Rate (%)	OSSE Contract (%)
Administrator/ Teacher	n=67	n=185
Bachelor's degree+	52.2%	39.8%
Associates degree	20.1%	23.1%
CDA	49.8%	54.1%
Teacher	n=484	n=1031
Bachelor's degree+	45.1%	32.6%
Associates degree	18.8%	22.2%
CDA	58.8%	55.7%
Total Teachers	n=542	n=1216
Bachelor's degree+	44.8%	33.6%
Associates degree	19.1%	23.0%
CDA	57.6%	56.0%
Family Home Provider	n= 39	n=59
Bachelor's degree+	41.0%	16.0%
Associates degree	25.6%	36.2%
CDA	33.3%	70.8%

Source: 2012 Market Rate Survey

Hours of Training

The average annual clock hours of training for family home providers has continued to decline from 50.3 in 2008, to 33.3 in 2010 and the average for 2012 is 26.6. The median annual hours of training remained the same from 2010 to 2012 and the percentage of providers reporting zero hours of training increased from 22 percent to 33 percent, respectively. 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 from 144.3 to 166.3 in 2012. Average annual training hours range from a low of 30.3 for administrative teachers to a high of 38.7 for teachers with a BA degree or higher. The average annual training hours in all categories among center based employees increased with the highest increase occurring among classroom aides from 6.8 in 2010 to 32.1 in 2012. This increase may be a result of the associated value and professional development/growth that training provides for the classroom aides.

Table 10
Average Annual Hours of Training by Provider Type and Employees (2010 and 2012)

Employee	Median Annual Hours of Training		Mean Annual Hours of Training		% with "0" Annual Hours of Training		
	2010	2012	2010	2012	1998	2010	2012
Family Home Provider	18.0	18.0	33.3	26.6	36.7%	22.6%	33.2%
Administrator	15.0	22.0	29.9	32.0	16.5%	42.5%	41.1%
Admin. / Teacher	0.0	30.0	15.0	30.3	Na	61.3%	56.9%
Teacher w BA+	18.0	24.0	33.6	38.7	13.9%	37.7%	51.4%
Teacher w CDA	18.0	24.0	31.6	38.1	16.7%	29.7%	39.6%
Assistant Teacher	17.0	24.0	25.2	36.3	7.6%	41.5%	43.1%
Classroom Aide	0.0	24.0	6.8	32.1	6.8%	79.2%	68.1%
Total Child Care Center Provider*	97.0	133.2	144.3	166.3	8.9%	9.9%	11.3%

Source: 1998, 2010, and 2012 Market Rate and Capacity Utilization Surveys; * Total reflects the median and mean for each employee and for all center providers.

A substantial number of center-based personnel participated in no training activities in 2010 and 2012. However, 88.7 percent of all centers provided training for some categories of employees in 2012. Center providers reporting zero hours of training range from a high of 68.1 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 (36.7%) and 2008 (11.6%), it doubled between 2008 and 2010 and has continued to increase in 2012. The percentage of center-based employees not engaged in training for professional development increased between

2010 and 2012.

Almost all directors (95.4 percent) are aware of employee training activities. While most employers (82.3 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, e.g., OSSE.

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 - 61.1 percent
2. Can't afford to participate - 32.0 percent
3. Training is not accessible - 49.2 percent
4. Staff is not interested - 40.9 percent
5. Training is too elementary - 27.7 percent
6. Nonpaid training time - 55.7 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 salary for a teacher with a Bachelor's degree is $33,118 per year and the median salary for this same position/group is $31,200; $16.20 per hour or $15 hours respectively. The comparable salaries for a teacher with the CDA certification are $26,093 per year ($12.92 per hour) for the mean and $24,960 per year ($11.00 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)

Table 11

Average Salaries by Center Employee Groups

Position	Annual		Hourly	
	Mean	Median	Mean	Median
Director *n=280*	$49,352	$45,000	$20.95	$15.00
Administrator / Teacher *n=252*	$37,622	$35,000	$18.47	$13.00
Teacher with Bachelor's or higher N = 342	$33,118	$31,200	$16.20	$15.00
Teacher with CDA *n=916*	$26,093	$24,960	$12.92	$11.00
Assistant Teacher *n=712*	$22,826	$21,500	$11.44	$10.00
Classroom Aide *n=223*	$21,013	$18,720	$9.68	$9.00

Source: 2012 Market Rate Survey

Salaries increased, between 2010 and 2012, for all positions except Directors and Administrator/Teachers whose salary decreased. Private provider salaries for all positions are higher than OSSE contract child care providers in 2010 as well as 2012. Director salaries are 20 percent higher for private providers compared to OSSE contract providers. (See Table 12)

TABLE 12

AVERAGE ANNUAL SALARIES

BY SELECTED POSITION AND TIER LEVEL (2010 AND 2012)

POSITION	PRIVATE RATE (2010) (N=78)	PRIVATE RATE (2012) (N=78)	GOLD TIER (2010) (N=48)	GOLD TIER (2012) (N=66)	SILVER TIER (2010) (N=30)	SILVER TIER (2012) (N=31)	BRONZE TIER (2010) (N=65)	BRONZE TIER (2012) (N=62)
Director Only								
Mean Salary	$71,151	$62,946	$46,851	$42,013	$40,566	$40,206	$37,555	$36,450
Median Salary	$40,000	$52,000	$39,000	$40,000	$38,000	$39,000	$36,000	$33,360
Administrator/ Teacher								
Mean Salary	$39,720	$37,225	$40,266	$32,443	$37,122	$32,600	$34,532	$31,900
Median Salary	$37,000	$31,600	$35,000	$31,200	$30,600	$31,200	$35,000	$29,120
Teacher w/Bachelor's+								
Mean Salary	$35,674	$32,875	$29,930	$31,407	$31,195	$30,250	$29,310	$29,760
Median Salary	$33,280	$31,600	$30,000	$30,080	$29,210	$29,120	$27,040	$27,040
Teacher w/CDA								
Mean Salary	$27,561	$28,454	$25,076	$24,353	$24,711	$24,152	$24,118	$24,320
Median Salary	$28,225	$27,060	$24,490	$22,800	$24,000	$22,100	$22,440	$22,200
Assistant Teacher								
Mean Salary	$24,753	$24,882	$19,298	$21,334	$18,121	$22,900	$17,942	$20,622
Median Salary	$24,500	$24,480	$19,760	$20,000	$17,840	$18,720	$17,680	$18,500

Source: 2010 and 2012 Market Rate Survey

All center providers were also asked about the policies for adjusting salaries. Approximately 47.7 percent of providers give merit-based raises, 40.4 percent give cost of living raises, and 28.9 percent give other bases for raises. Other bases cited include availability of funds, education, years on the job, and regional salary levels.

While private providers continue to be more likely to adjust salaries based on merit (55.4 percent) than are OSSE contract providers (49.3 percent), the gap is similar to 2010 (60.2 versus 54.7). OSSE contract providers are more likely than private providers to base salary adjustments on the cost of living, availability of funds, or other reasons.

Benefits

Table 13 reports benefits received by family home providers and employees of child care centers. There continues to be a decline in the percentage of providers offering benefits to all employees for both family home centers and child care centers. Most centers (85.4 percent) do not offer benefits for part-time employees.

In 2012 there was a decrease in health care benefits, life insurance benefits, and retirement benefits among child care centers. However, paid sick leave and paid vacation benefits increased among both family home centers and child care centers. The percentage of centers with no benefits increased in 2012 from 7.5 percent to 12.7 percent. While there is an increase in the percentage of family home providers with life insurance and paid leave benefits, there are declines, from 2010 to 2012, in the percentages of those with disability, health insurance and, retirement benefits.

Most other employee 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	
	2010	2012	2010	2012
Health Insurance	83.1%	67.4%	67.5%	54.9%
Life Insurance	50.0%	57.6%	46.7%	41.4%
Retirement	26.7%	18.5%	45.3%	41.3%
Disability	27.8%	17.4%	40.1%	43.5%
Paid Sick Leave	5.6%	13.0%	69.8%	72.6%
Paid Vacation	4.4%	20.7%	69.3%	78.5%
Other	11.1%	3.3%	11.9%	18.9%
No Benefits	8.9%	16.9%	7.5%	12.7%

Source: 2012 Market Rate Survey

Family home providers paid a mean annual cost of $1,141 and a median of $500 for out-of-pocket medical expenses for the last year. Approximately 63.8 percent made no visits to the emergency room for their own care, and 82.2 percent made no emergency room visits for their own child's care. Nearly 2.5 percent made two to three visits and 1.1 percent made four or more visits to emergency rooms during the past year. Most family home providers (40.2 percent) would continue to offer child care services if health insurance were not available to them.

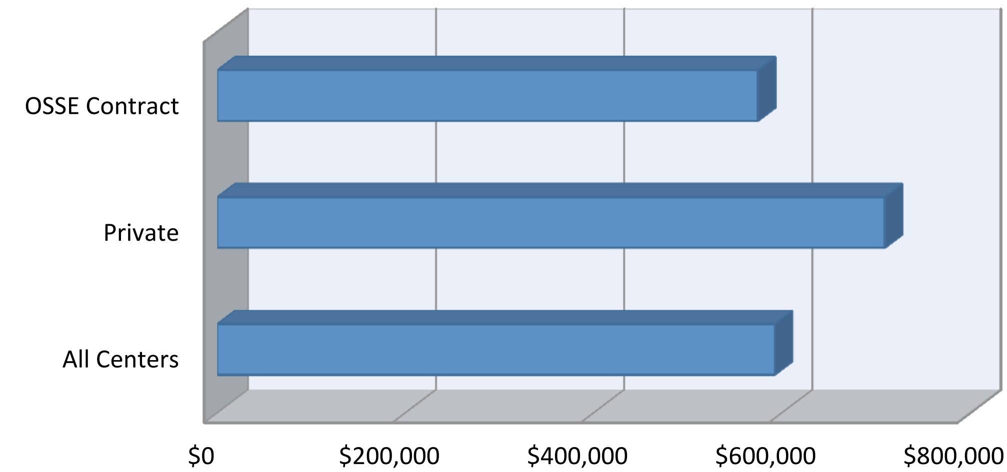
On average, 84.4 percent of child care center employees participate in the benefit plans offered. Lower percentages of centers (32.1 percent in 2012 versus 44.3 percent in 2008) have 100 percent employee participation and 3.3 percent have no employee participation in available benefit plans. Employee benefit programs average 22.3 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 $39,974 and a median of $38,107. Private providers received an average of $42,355 and OSSE contract providers received average gross revenue of $39,017. While, overall, private family home providers' gross receipts are 5.1 percent higher than receipts of OSSE contract providers, gold and silver tier providers actually have the highest average gross receipts at $47,221. This difference is largely attributable to higher average enrollment figures (5.2 percent for gold, 5.4 percent for silver versus 3.3 percent for private providers). Figure 3 illustrates the gross annual enrollment revenue received by center providers.

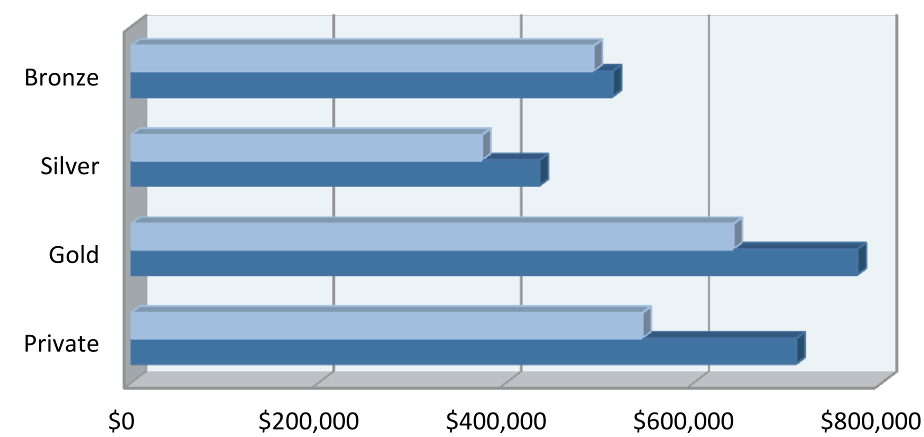
Figure 3
Gross Annual Center Enrollment Revenue by Contract Status



	All Centers	Private	OSSE Contract
Mean	$592,223	$709,112	$574,109

Source: 2012 Market Rate Survey

Figure 4
Gross Annual Center Enrollment Revenue by Tier Level



	Private	Gold	Silver	Bronze
Median	$545,050	$642,050	$374,112	$493,120
Mean	$709,112	$774,202	$435,121	$513,121

Source: 2012 Market Rate Survey

Provider Revenue Sources

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

Approximately 35 percent of family home providers and 55.1 percent of child care center providers currently charge registration fees for children enrolling in their programs. While the percentage of family home providers charging registration fees increased slightly (33.3 percent to 34.9 cent), center providers charging registration fees decreased from 76.8 percent in 2010 to 55.1 percent in 2012. Child care center providers are more likely to have fees for meals, transportation, liability insurance, and special activities/programs. Other fees include primarily late pickup fees, late payment fees, and bounced check fees.

Both family home providers (67.8 percent) and child care center providers (76.6 percent) charge fees for late pick-up of children. Fifty-eight percent of family home providers and 57.1 percent of child care center providers charging fees, charge by the minute. Approximately 14.8 percent of homes and 16.1 percent of centers grant a grace period (typically 15 minutes) before requiring additional payment.

TABLE 14

PERCENT OF PROVIDERS CHARGING ADDITIONAL FEES

TYPE OF FEE	% FAMILY HOME PROVIDERS	% CHILD CARE CENTER PROVIDERS
Registration	34.9%	55.1%
Supplies	1.7%	7.2%
Activities/Programs	.9%	12.3%
Meals	.9%	6.1%
Liability Insurance	.9%	1.3%
Transportation	.9%	1.6%
Other Fees	67.8%	76.6%

Source: 2012 Market Rate Survey

While 68.9 percent of family home providers and 71.9 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 (Table 15) generate revenue for 28.1 percent (compared to 23.6 percent in 2010) of these providers, while 11.1 percent received private grants), 18.7 percent received federal and/or government grants, and 34.9 percent received district grants. In comparison to 2010 the grants from other revenue sources ranged from 11.3 to 27.4 percent.

Additionally, 40.6 percent of all (private and OSSE contract) family home providers and 46.4 percent of all child care center providers receive revenues from agency reimbursements.

TABLE 15
OTHER REVENUE SOURCES

REVENUE SOURCE	% FAMILY HOME PROVIDERS	% CHILD CARE CENTER PROVIDERS
Fund Raising	2.8%	28.1%
Agency Reimbursements	40.6%	46.4%
Federal Government Grants	3.8%	18.7%
District Government Grants	13.2%	34.9%
Private Grants	5.7%	11.1%
Other Revenue Source	.9%	12.3%
Parent Charge	68.9%	71.9%

Source: 2012 Market Rate Survey

While 1.7 percent of family home providers reported receiving non-cash benefits in the form of rent, utilities and/or equipment, 8.4 percent receive food contributions. Approximately 5.5 percent of centers receive non-cash rent, 4.7 percent receive non-cash utilities, 6.8 percent receive food contributions, 8.1 percent receive equipment contributions, and 17 percent reported receiving other non-cash benefits. Other non-cash benefits include items and/or services donated by parents and/or other organizations. Eighty-one percent of child care center providers and 95 percent of family home providers did not receive any non-cash benefits.

Professional Accreditation Status

Approximately 29.2 percent of family home providers and 40.9 percent of child care center providers report that they have received accreditation from a professional accreditation organization. However, while 3.8 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 7.5 percent of family home providers and 25.2 percent of child care center providers are currently engaged in some step of the accreditation process. (See Table 16)

TABLE 16

PROFESSIONAL ACCREDITATION STATUS

STATUS	FAMILY HOME PROVIDERS		CHILD CARE CENTER PROVIDERS	
	2010	2012	2010	2012
Accredited	24.2%**	29.2%	38.5%	40.9%
Have filed application for accreditation	7.6%	2.8%	6.6%	11.5%
Preparing to apply for accreditation	17.2%	4.7%	24.1%	13.7%

Source: 2010 and 2012 Market Rate Surveys; *Note: An additional 13.7 percent are "preparing to apply" for accreditation; however, NAEYC does not accredit facilities where the operator lives. **Includes 6.6 percent citing NAEYC accreditation.*

The most frequently cited accreditation organization for centers is the National Association for the Education of Young Children (NAEYC) at 32.3 percent and for Family home providers is the National Association for Family Child Care (NAFCC) at 20.8 percent. Other accreditation organizations cited are: the Council on Accreditation (COA); the National After-School Association; the National Association of Independent Schools (NAIS); Middle States Accreditation for Middle Schools (MSAMS); the American International Montessori Society (AIMS); 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. Private child care center providers are more likely to be accredited by some accrediting organization than are OSSE child care center providers (40 percent versus 29 percent, respectively); however, OSSE contract child care center providers are a little more likely to be accredited by NAEYC (32.3 percent versus 28.1 percent, respectively). OSSE contract family home providers are more likely to be accredited than their private provider peers.

Providers not currently accredited were asked what they would need to become accredited; see Table 17.

Table 17

Assistance Needed for Accreditation

Area of Need	Family Home Providers	Child Care Center Providers
Additional information	20.8%	10.2%
Mentor	13.2%	26.4%
Assistance with fees	17.9%	31%
Don't Intend to Apply	38.7%	16.2%

Source: 2012 Market Rate Survey

The top two areas of needed assistance cited by providers are assistance with fees (48.9 percent) and mentoring (39.6 percent). Other types of assistance identified include staff training, scholarships, and time for applying. Approximately 38.7 percent of family home providers and 16.2 percent of child care center providers indicated that they do not intend to apply for accreditation.

Tenure

Table 18 shows the median and mean years of service for child care providers by position for total providers, private providers, and OSSE contract providers. Similarly, as in 2010, staff at OSSE child care centers have slightly more average years of service than at private child care centers.

OSSE contract family home providers have slightly more average years of service than do their private provider peers; 12.6 years versus 11.4 years respectively.

Table 18

Average Tenure of Child Care Workforce by Position (2012)

Position	Total Providers	Private Provider	OSSE Contract
Family Home Provider			
Median Years of Service	10.0	9.0	11.0
Mean Years of Service	12.0	11.4	12.6
Director Only			
Median Years of Service	7.0	6.7	8.0
Mean Years of Service	9.2	5.0	9.6
Administrator/Teacher			
Median Years of Service	5.0	4.7	5.0
Mean Years of Service	4.5	4.2	5.3
Teacher			
Median Years of Service	3.6	4.0	3.0
Mean Years of Service	5.7	4.7	6.2
Assistant Teacher			
Median Years of Service	3.0	2.0	4.0
Mean Years of Service	3.8	3.5	4.2
Classroom Aide			
Median Years of Service	3.0	3.0	3.0
Mean Years of Service	4.1	3.8	4.1

Source: 2012 Market Rate Survey

3.2 MARKET RATES

Child care rates were computed for seven age groups:

- Infant
- Age 1 year
- Age 2 years (Toddlers: Age 1 year and Age 2 years)
- Age 3 years
- Age 4 years (Pre-Schoolers: Age 3 years and Age 4 years)
- Age 5 years (School-Age: 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 private providers can be found in Appendix B.) Rates are based on the actual number of hours and days that the typical child is in care with each provider.

Private child care providers are licensed child development centers and/or licensed child development homes that have no contract with the Division of Early Learning to provide services under the Child Care Subsidy Program.

OSSE contract child care providers are licensed child development centers and/or licensed child development homes that have a contract with the Division of Early Learning 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 private providers and OSSE contract providers.

Family Home Provider respondents include:

- 59 OSSE contract child development homes, with 295 slots
- 47 private child development homes, with 188 slots

Child Care Center Providers include:

- 159 OSSE contract child development centers, with 8,444 slots
- 78 private child development centers, with 4,266 slots

In 2012, 44.4 percent of family home providers and 33.2 percent of child care center providers responding to the survey were classified as private child care providers.

Family Home Provider Rates

Infants*

Child care rates are identified for private providers in Table 19, providers with OSSE contracts in Table 20, and the total pool of family home providers in Table 21. Approximately 53.2 percent of all family child care infant enrollment is with private providers compared to 39.1 percent in 2010 and 29.1 percent in 2008.

The full-time daily market rate for infants is $59.75*(Table 19). The rate increased by $13.75* from $46.00* per day in 2010. The rate charged by providers with OSSE contracts is $45.50* per day (Table 20). The total pool of family home providers has a rate of $50.08* 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 $50.00* (Table 19). The rate increased from $47.50* per day in 2010. Approximately 32.3 percent of children in this age group are with private providers. Providers with OSSE contracts have a daily rate of $40.40* (Table 20). The total pool of family home providers has a rate of $47.04* per day (Table 21).

The full-time daily market rate for children age 2-years is $50.22* (Table 19). Providers with OSSE contracts have a daily rate of $40.04* (Table 20). As Table 21 shows, the total pool of family care providers has a rate of $46.50*. Forty (40) percent of children age 2-years are with private providers. The corresponding figure for 2010 is 28.3 percent.

*Rates calculated at the 75th percentile

Preschool*

The full-time market rate for children age 3-years is $ 50.01* per day (Table 19). The full-time rate for providers with OSSE contracts is $40.00* (Table 20). The rate for the total pool of providers is $44.75* (Table 21). Approximately 17 percent of 3-year-olds are enrolled with private providers. In 1998, 77.2 percent of preschoolers were in family home private providers. The corresponding numbers are 35.4 percent in 2006; 21.7 percent in 2008; and 20.8 in 2010, respectively. The implementation of universal pre-kindergarten in 2010 greatly influenced this declining trend.

The full-time market rate for children age 4-years is $51.02*, while the rate for OSSE contract providers is $39.02* and for the total pool of providers is $40.02* per day. There are few 4-year-olds enrolled full-time in both private family home and OSSE contract provider care. The market rate is based on 9 reported slots, while the OSSE contract rate is based on 15 reported slots.

School-Age*

The full-time market rate for school-age children is $42.06* per day (Table 19). Providers with OSSE contracts have a rate of $41.05* per day (Table 20). The rate for the total pool of providers is $40.00* 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 (83 percent) are with OSSE contract providers. The corresponding percentages in 2010 and 2008 were 86.8 percent and 91.7 percent of school-age children respectively, were with OSSE contract providers.

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

*Rates calculated at the 75th percentile.

Table 19

Full-time Rates for Family Home Private Providers

Service Group	Hour*	Day	Week	Month	Year
Infant n=41	$6.35	$59.75	$298.75	$1293.58	$15,523
Age 1 n=21	$5.26	$50.00	$250.00	$1082.50	$12,990
Age 2 n=46	$5.28	$50.22	$251.10	$1087.26	$13,047
Age 3 n=13	$5.55	$50.01	$250.50	$1084.66	$13,016
Age 4 n=9	$5.66	$51.02	$255.12	$1104.66	$13,256
School-age n=1		$42.06	$210.33		

Source: 2012 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 Contract Providers

Service Group	Hour*	Day	Week	Month	Year
Infant n=36	$4.46	$45.50	$227.50	$985.07	$11,821
Age 1 n=44	$3.36	$40.40	$202.00	$874.66	$10,496
Age 2 n=70	$4.04	$40.04	$200.20	$866.86	$10,402
Age 3 n=63	$3.96	$40.00	$200.00	$866.00	$10,392
Age 4 n=15	$3.90	$39.02	$195.10	$844.78	$10,137
School-age n=7		$41.05	$205.25		

Source: 2012 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

SERVICE GROUP	HOUR*	DAY	WEEK	MONTH	YEAR
Infant n=77	$5.13	$50.80	$250.40	$1084.23	$13,011
Age 1 n=65	$4.48	$47.04	$235.21	$1018.45	$12,221
Age 2 n=116	$4.69	$46.50	$232.50	$1006.72	$12,081
Age 3 n=76	$4.56	$44.75	$223.75	$986.83	$11,626
Age 4 n=24	$4.08	$40.02	$200.10	$866.43	$10,397
School-age n=8		$40.00	$200.00		

Source: 2012 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 private providers in Table 22, providers with OSSE contracts in Table 23, and the total pool of child care center providers in Table 24. Approximately 36.8 percent of all enrolled infant slots in child care centers are with private providers; 63.2 percent are with OSSE contract providers. Fifty-eight (58) percent of infant enrollment in 1998; 34.5 percent in 2008; and 35.4 percent in 2010, respectively were with private providers.

The daily full-time market rate for infants is $84.48* (Table 22). Providers with OSSE contracts have a daily rate of $58.66* (Table 23). The OSSE full-time rates are significantly below the market rates for infant care.

The total pool of center-based providers has a rate of $72.03* per day (Table 24).

Toddlers*

The daily full-time market rate for children age 1-year is $78.98* (Table 22). Approximately 28.5 percent of 1-year-olds are with private providers; 71.5 percent are with OSSE contract providers. Providers with OSSE contracts have a daily rate of $56.39* (Table 23). The total pool of child care center providers has a rate of $66.92* per day (Table 24). Approximately twenty-four (24) percent of children who are 2-years are in full-time care with private providers, while 76 percent are with OSSE contract providers. In 1998, 60 percent of toddlers were enrolled with private providers.

*Rates calculated at the 75th percentile

The full-time daily market rate for the children age 2-years is $78.98* (Table 22). Providers with OSSE contracts have a rate of $50.99* per day (Table 23). The total pool of center-based providers has a daily rate of $60.04* (Table 24).

Preschool*

The full-time market rate for children age 3-years is $66.60* per day (Table 22); an increase from $57.78* in 2010 and $61.89* in 2008, respectively. The rate charged by providers with OSSE contracts is $46.97* (Table 23). The rate for the total pool of providers is $56.47* per day (Table 24). Approximately 75 percent of the enrolled slots for 3-year-olds are with OSSE contract providers, while 25 percent are with private providers; a decrease from the almost forty-one (40.8) percent of these slots with private providers in 2010.

The full-time market rate for children age 4-years is $65.08* per day (Table 22). The rate charged by providers with OSSE contracts is $46.23* (Table 23). The rate for the total pool of providers is $56.42* per day (Table 24). Approximately 67 percent of the enrolled slots for 4-year-olds are with OSSE contract providers, while 33 percent are with private providers. The corresponding private provider enrolled slots in 2010 was 40.7 percent.

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 $67.75* per day (Table 22). Providers with OSSE contracts have a rate of $46.97* per day (Table 23). The rate for the total pool of providers is $58.99* per day (Table 24). Approximately thirty-nine percent (38.8) of school-age children in full-time care with child care providers when school is closed are with private providers and 61.2 percent are with OSSE providers.

*Rates calculated at the 75th percentile

TABLE 22

FULL-TIME RATES

FOR CHILD CARE CENTER PRIVATE PROVIDERS

SERVICE GROUP	HOUR*	DAY	WEEK	MONTH	YEAR
Full-Time					
Infant *n =389*	$9.28	$84.48	$422.40	$1829	$21,948
Age 1 *n=427*	$8.49	$78.98	$394.91	$1710	$20,520
Age 2 *n=623*	$7.42	$72.05	$360.27	$1560	$18,720
Age 3 *n=649*	$6.74	$66.60	$333.20	$1442	$17,304
Age 4 *n=505*	$6.70	$65.08	$325.40	$1409	$16,908
School-age n=274		$67.75	$338.79		

Source: 2012 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 CONTRACT PROVIDERS

SERVICE GROUP	HOUR*	DAY	WEEK	MONTH	YEAR
Full-Time					
Infant *n=667*	$6.44	$58.66	$293.30	$1,270	$15,240
Age 1 *n=1071*	$6.26	$56.39	$281.98	$1,221	$14,652
Age 2 *n=1944*	$5.25	$50.99	$254.96	$1,104	$13,248
Age 3 *n=1908*	$5.05	$46.97	$234.87	$1,017	$12,204
Age 4 *n=1020*	$5.13	$46.23	$231.17	$1,001	$12,012
School-age *n=432*		$46.97	$234.87		

Source: 2012 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 24
Full-Time Rates
for Total Child Care Center Providers

Service Group	Hour*	Day	Week	Month	Year
Full-Time					
Infant *n=1056*	$8.47	$72.03	$360.16	$1544	$18,528
Age 1 *n=1498*	$7.69	$66.92	$334.64	$1449	$17,388
Age 2 *n=2567*	$6.52	$60.04	$300.23	$1300	$15,600
Age 3 *n=2557*	$6.01	$56.47	$280.36	$1214	$14,568
Age 4 *n=1525*	$5.46	$56.42	$282.10	$1221	$14,652
School-age *n=706*		$58.99	$294.97		

Source: 2012 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 private child care providers and child care providers with an OSSE contract to provide services under the Child Care Subsidy Program, as well as differences between child care provider rates for 2010 and 2012. It should be noted that OSSE rates are at least $10 below market rate and the total provider rate.

Table 25

COMPARISON OF DAILY FULL-TIME RATES FOR CHILD CARE SERVICES

FULL-TIME (35 HRS A WEEK OR MORE)	PRIVATE PROVIDERS		OSSE CONTRACT PROVIDERS		TOTAL PROVIDERS	
Family Home Provider	**2010**	**2012**	**2010**	**2012**	**2010**	**2012**
Infant	$46.00	$59.75	$40.50	$45.50	$45.00	$50.08
Age 1	$47.50	$50.00	$36.00	$40.40	$37.50	$47.04
Age 2	$50.00	$50.22	$34.25	$40.04	$35.00	$46.50
Age 3	$62.50	$50.01	$33.00	$40.00	$35.00	$44.75
Age 4	$55.25	$51.02	$31.00	$39.02	$31.50	$40.02
School-age	$52.50	$42.06	$25.80	$41.05	$27.25	41.50
Center Provider	**2010**	**2012**	**2010**	**2012**	**2010**	**2012**
Infant	$75.29	$84.48	$60.00	$58.66	$70.40	$72.03
Age 1	$72.47	$78.98	$55.61	$56.39	$67.44	$66.92
Age 2	$64.20	$72.05	$51.00	$50.99	$58.66	$60.04
Age 3	$57.78	$66.60	$46.19	$46.97	$53.49	$56.47
Age 4	$57.60	$65.08	$50.00	$46.23	$54.04	$56.42
School-age	$57.30	$67.75	$45.00	$46.97	$54.00	$58.99

Source: 2012 Market Rate Survey; *Note: Rates are at the 75th percentile*

Child Care Center Part-time Rates*

Approximately 44.7 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, 36 percent of these child care center providers require a minimum number of hours. Among child care center providers with children enrolled part-time, 58 percent of private providers and 38 percent of OSSE 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 (13) in part-time care. The market rate for infants in part-time care is $68.40* per day or $17.11* per hour. Providers with OSSE contracts agreements have a part-time rate of $36.80* per day or $9.20* per hour. The rate for the total pool of child care center providers is $48.92* per day or $12.23* per hour. Infants are in part-time care a median of 9 hours per day and 2 days per week with private providers and a median of 6 hours per day and 5 days per week with OSSE contract providers.

The part-time market rate for 1-year-olds is $65.50* per day or $10.75* per hour (Table 26). The rate charged by providers with OSSE 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 $29.00* per day or $7.25* per hour. Although OSSE rates are significantly lower than private rates, it is approximately $10 higher than the rate based on the total pool of providers. Children age 1-year are in care a median of 6 hours per day and 3 days per week with private providers and 4 hours per day and 2 days per week with OSSE contract providers (Table 27).

The part-time market rate for 2-year-olds is $77.79* per day or $17.20* per hour (Table 26). For providers with OSSE contracts, the part-time rate is $21.20* per day or $5.30* per hour. The part-time rate for the total pool of providers is $24.48* per day or $6.12* per hour. Children age 2-years are in care a median of 4 hours per day and 3 days per week with both private providers and OSSE contract providers (Table 27).

The part-time market rate for children age 3-years is $80.16* per day or $13.36* per hour (Table 26). Approximately 72.8 percent of part-time slots for preschoolers are with private providers. The part-time rate charged by providers with OSSE contracts is $29.20* per day or $7.30* per hour. The part-time rate for the total pool of providers is $41.00 per day or $8.20 per hour. Both three year-olds and four year-olds are in care on average of 6 hours per day with private providers and 4 hours per day with OSSE contract providers (Table 27).

*Rates calculated at the 75th percentile

Table 26
Part-time Rates
for Child Care Center Providers

Service Group	Private		OSSE Contract		Total Providers	
	Hourly	Daily	Hourly	Daily	Hourly	Daily
Infant *n=13*	$17.11	$68.40	$9.20	$36.80	$12.23	$48.92
Age 1 *n=141*	$10.75	$65.50	$7.25	$29.00	$8.12	$24.36
Age 2 *n=341*	$17.20	$77.79	$5.30	$21.20	$6.12	$24.48
Age 3 *n=679*	$13.36	$80.16	$7.30	$29.20	$8.20	$41.00
Age 4 *n=645*	$11.66	$69.99	$7.50	$30.00	$11.66	$58.30

Source: 2012 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

Service Group	Private		OSSE Contract		Total Providers	
	Hours	Days	Hours	Days	Hours	Days
Infant *n=13*	4	2	4	2	4	2
Age 1 *n=141*	6	3	4	2	5	3
Age 2 *n=341*	4	3	4	3	4	3
Age 3 *n=679*	6	4	4	5	5	5
Age 4 *n=645*	6	5	4	5	5	5

Source: 2012 Market Rate Survey

Rates for Child Care Providers Enrolling Children with Disabilities

Child care providers responding to the survey currently enroll children with disabilities. Of these children, 8.8 percent or 37 children with disabilities have either an IEP or IFSP. Approximately 8.6 percent of family home providers and 22.2 percent of centers have children with disabilities currently 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 AND EXPANSION

Capacity Utilization

Survey respondents have a licensed capacity of 13,217 child care slots. Family home providers are licensed for 483 slots and child care center providers are licensed for 12,734. 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 and 2010. The capacity utilization in 2010 was 76.1 percent for family home providers; 82.3 percent for child care center providers; and 82.1 percent for total providers.

Table 28 (below) reflects the capacity and enrollment, by provider type, for 2012.

TABLE 28

CAPACITY AND ENROLLMENT BY PROVIDER TYPE (2012)

NO. OF CHILD CARE SLOTS	FAMILY HOME PROVIDERS	CENTER PROVIDERS	TOTAL PROVIDERS
Licensed Capacity	483	12,734	13,217
Current Enrollment	366	9,909	10,275
*Capacity Utilization – 2012	79.7%	77.9%	78.0%
*Capacity Utilization – 2010	76.1%	82.3%	82.1%

Source: 2012 Market Rate Survey ** Ratio of current enrollment to the current maximum*

The capacity utilization was also computed for both private and OSSE contract providers. While 79.2 percent of current center capacity is being utilized at private centers, just 76.1 percent of center capacity is being utilized at OSSE contract centers. However, among family home providers, OSSE contract providers utilize nearly 81.2 percent of capacity while private providers utilize 74.1 percent of capacity.

Retention of Child Care Facilities

The number of licensed family homes and child care centers both changed slightly since 2010 with a 9 percent decrease and 21 percent increase, respectively. Table 29 shows net change in the number of licensed child care facilities by ward since 2010.

TABLE 29

NET CHANGE IN THE NUMBER OF LICENSED CHILD CARE FACILITIES BY WARD (2010-2012)

WARD	CLOSED (NO.)		NEW LICENSE (NO.)		NET CHANGE	
	Homes	Centers	Homes	Centers	Homes	Centers
1	5	5	3	2	-2	-3
2	1	7	0	12	-1	+5
3	2	1	0	1	-2	0
4	14	8	9	5	-5	-3
5	4	7	9	12	+5	+5
6	7	3	3	11	-4	+8
7	11	4	8	9	-3	+5
8	8	8	6	6	-2	-2
Total	52	43	38	58	-14	+15

Source: 2012 Market Rate Survey

Nearly one-third (34.6 percent) of all family home providers and 12.5 percent of all child care center providers operating in 2010 were no longer licensed in 2012. These losses in service providers were somewhat offset by a 17% increase of newly licensed child care centers and a 25% increase of newly licensed child care family homes during this two-year period. Fifty-six or (16.3 percent) of the centers responding to the 2010 Market Rate and Capacity Utilization Study were no longer licensed in 2012. It should be noted that a small number of surveys mailed to licensed child care centers and homes were “returned to sender;” they were included as part of the “closed” totals.

While four (4) out of the eight (8) wards lost child care centers, Wards 2, 5, 6, and 7 experienced a net growth in the number of centers. All wards, except Ward 5, experienced a decline in the number of family home providers.

Waiting List

Most private family home 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 Learning does not have a waiting list for families seeking child care subsidies.

Despite 4,000 open child care slots citywide, the distribution is not geographically available according to demand and need. There are currently 9,714 children on provider waiting lists. Family home providers have 313 children on waiting lists, including 195 children 0-3-years of age. Child care center providers have 9,401 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). Infants hold the highest waiting list slot at 3528 (36.3 percent). Toddlers hold 3928 waiting list slots, or 40.4 percent of the total, and preschoolers hold 1803 of the remaining slots (18.5 percent).

TABLE 30

CURRENT ENROLLMENT AND WAITING LIST BY AGE AND PROVIDER GROUP (2012)

AGE GROUP	FAMILY HOME PROVIDERS		CHILD CARE CENTER PROVIDERS		TOTAL PROVIDERS	
	Enrollment	Wait List	Enrollment	Wait List	Enrollment	Wait List
Infant	77	53	1056	3475	1133	3528
Age 1	65	49	1498	1911	1563	1960
Age 2	116	47	2567	1931	2683	1978
Age 3	76	46	2557	1147	2633	1193
Age 4	24	15	1525	595	1549	610
School-age	8	14	706	342	714	356
Total	366	224	9909	9401	10275	9625
% Licensed Capacity – 2012	75.7%	60.4%	77.8%	73.8	77.7%	73.5%

Source: 2012 Market Rate Survey

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 31 shows, there are substantial numbers of children waiting for slots. The shortage of available slots increased from 36.9 percent of capacity in 1998 to 77.0 percent in 2008, decreased to 68.7 percent of capacity in 2010 and increased slightly to 73.5 percent in 2012. 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, more than three-fourths (76.7 percent) of children on waiting lists are under 3-years of age and 18.4 percent are 3-and 4-year olds. More than half (51.2 percent) of children are waiting for slots at child care facilities located in Wards 1 and 2, and an additional 24.5 percent are waiting for slots in Wards 6 and 8.

Table 31

Distribution of Child Care Waiting Lists by Age and Ward (2012)

Ward	Infants	Age 1	Age 2	Age 3	Age 4	Age 5+	Total	% Total
Ward 1	312	252	391	413	143	18	1529	15.7%
Ward 2	1265	859	698	225	206	201	3454	35.5%
Ward 3	282	78	187	101	31	17	696	7.2%
Ward 4	245	52	82	68	73	45	565	5.8%
Ward 5	101	29	56	72	21	15	294	3.0%
Ward 6	712	257	112	113	52	16	1262	13.0%
Ward 7	198	123	243	85	33	19	701	7.2%
Ward 8	413	310	209	116	51	25	1124	11.5%
Total	3528	1960	1978	1193	610	356	9625	100.0%
%Total	36.3%	20.1%	20.3%	12.2%	6.2%	3.6%	100.0%	

Source: 2012 Market Rate Survey

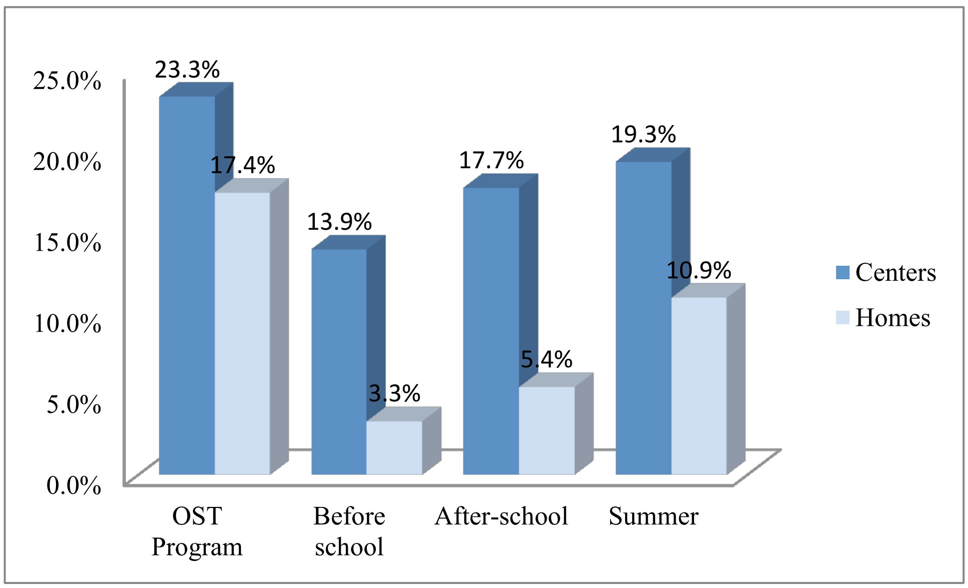
3.4 OUT-OF-SCHOOL TIME ACTIVITIES

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

There has been a slight decline in the percent of child care providers offering special programs for school-age children outside of normal hours. In 2010, 27.4 percent of centers and 18.3 percent of family homes offered special programs before school, after school, and/or during the summer for school-age children; however, 23.3 percent of centers and 17.4 family homes offered OST programs in 2012. While 17.4 percent of family home providers offer OST programs, only 7.2 percent currently have school age children enrolled.

FIGURE 5

CHILD CARE PROVIDERS OFFERING OUT-OF-SCHOOL TIME SERVICES (2012)



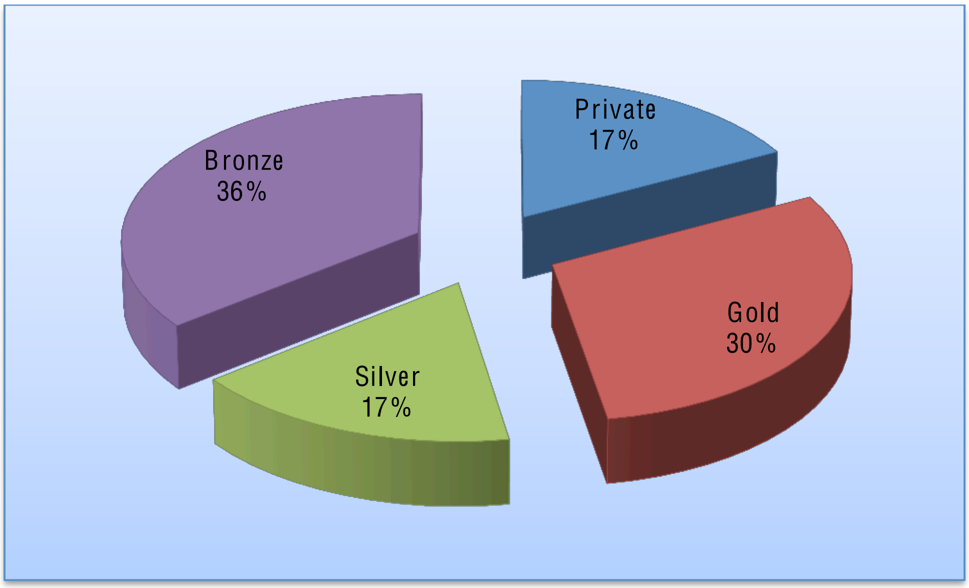
Source: 2012 Market Rate Survey

One-fifth of the providers offering OST programs are private child care centers. The OSSE contract child care center providers offering OST services continue to include all tiers of the subsidy program; however, there is no significant difference between gold, silver, and bronze tiers. Interestingly, there are more bronze tiered centers offering OST services than gold and silver. In 2012, gold centers were 30 percent of OST programs. This was an increase from 25 percent in 2010. Silver centers also slightly increased from 16 to 17 percent and bronze centers from 33 to 36 percent. Currently, silver tier centers are the least likely to offer these special programs (Figure 6).

FIGURE 6

DISTRIBUTION OF CENTERS OFFERING OUT-OF-SCHOOL-TIME PROGRAMS

BY TIER LEVEL (2012)



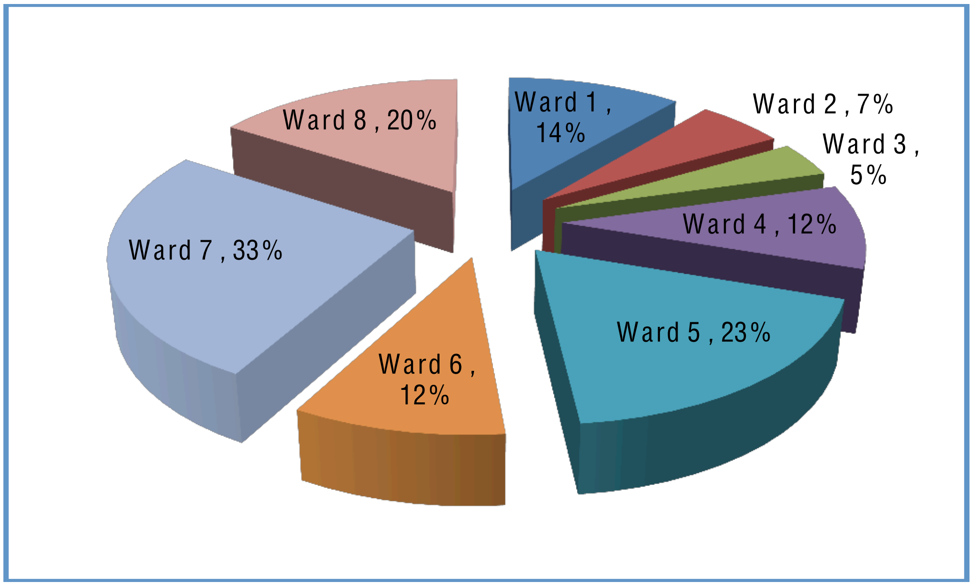
Source: 2012 Market Rate Survey

Location of OST Programs

Family home providers offering OST programs are located in Wards 1, 4, 5, 6, 7, and 8. Center providers are located throughout the District of Columbia. As illustrated in Figure 7, if we look at the distribution of total center providers offering OST programs, the highest percentage of centers are in Ward 7 and the lowest percentage in Wards 2 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 (33 percent), Ward 5 (23 percent), and Ward 8 (20 percent) are the most likely to offer programs (Table 32).

FIGURE 7

LOCATION OF CENTERS OFFERING OUT-OF-SCHOOL TIME PROGRAMS (2012)



Source: 2012 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, 55.4 percent of centers offering OST programs have before school services, 73.2 percent have after school services, and 80.4 percent offer summer programs.

Table 32 identifies program offerings by ward. Wards 1, 5, 7 and 8 are the most likely to offer before school programs and Wards 1, 5, 7 and 8 are the most likely to offer after school programs. Wards 1, 5, 7 and 8 are the most likely to offer summer programs for school-age children. Ward 3 centers are the least likely to provide before school services and ward 2 and 6 are least likely to offer 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	
	2012	2010	2012	2010	2012	2010	2012	2010
Ward 1	12.5%	17.4%	18.8%	100.0%	14.3%	100.0%	17.0%	75.0%
Ward 2	7.1%	14.3%	6.2%	14.3%	4.8%	28.6%	6.4%	100.0%
Ward 3	5.4%	22.2%	0.0%	75.0%	7.1%	100.0%	2.1%	25.0%
Ward 4	10.7%	16.7%	9.4%	50.0%	9.5%	100.0%	8.5%	50.0%
Ward 5	19.6%	25.9%	15.6%	47.9%	16.7%	57.1%	19.1%	85.7%
Ward 6	7.1%	45.2%	6.2%	50.0%	2.4%	57.1%	6.4%	71.4%
Ward 7	21.4%	60.0%	25.0%	75.0%	26.2%	83.3%	21.3%	66.7%
Ward 8	16.1%	31.0%	18.8%	55.6%	19.0%	55.6%	19.1%	100.0%

Source: 2012 Market Rate Survey

Participation in OST Programs

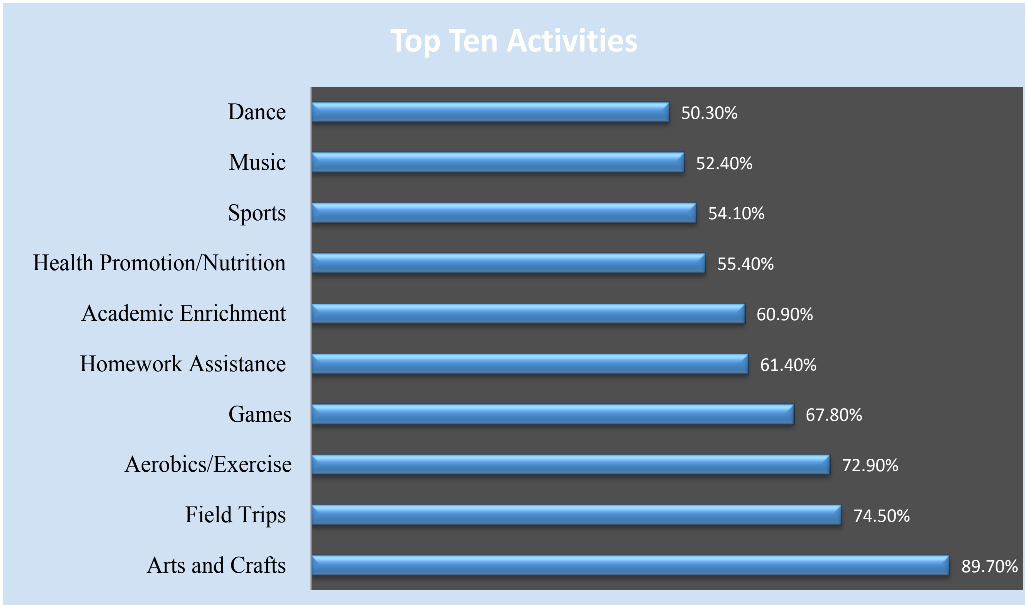
Survey respondents were asked how many children are enrolled in out-of-school time programs at their facilities. While 714 school-age children are enrolled in centers responding to the survey, approximately 80.3 percent (574) are enrolled in centers providing special programs for school-age children. Survey respondents in Ward 3 have the lowest percentage (18.3 percent) of school-age children enrolled in centers offering special OST programs and respondents in Ward 7 have the highest percentage (93.2 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 shown below in Figure 8.

Figure 8

Top Ten Activities for OST Programs (2012)



Source: 2012 Market Rate Survey

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.

Field trips are the top ranked activity across the wards. Arts and crafts are among the second ranked activity. Homework assistance, academic enrichment and swimming are the top ranked activities in Ward 5. Tutoring and games are top ranked in Ward 2 and 8.

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: 2012 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

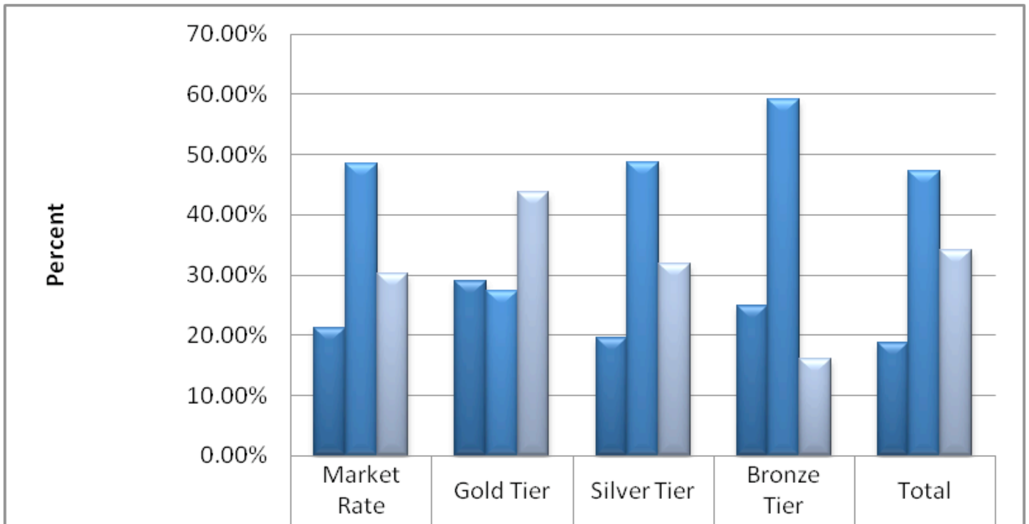
Both family home providers and child care center providers were asked whether they faced difficulties in making ends meet in their child care program. Approximately one-fifth (18.7 percent) of home providers and 30.6 percent of center providers find it very difficult to make ends meet in their programs. However, as shown in Figure 9 and Figure 10 below, 34.1 percent of family home providers and 26.1 percent of child care center providers find it not at all difficult to make ends meet.

Among family home providers, silver tier providers (68.2 percent) are much more likely to find it somewhat *to* very difficult in making ends meet. Interesting and perhaps encouraging findings suggest that gold tier providers (43.7 percent), who received the highest rates of reimbursement from OSSE, indicated that it is not at all difficult to make ends meet. Overall, private providers face the most difficulty (69.7 percent). Bronze tier providers, who receive the lowest rates of reimbursement from OSSE, maintain the highest difficulty levels (84 percent) among the OSSE contract family home providers.

Private child care center providers (42.5 percent) face lower levels of difficulty than OSSE contract child care center providers in making ends meet. Similar to the bronze-tier family home provider, the bronze tier child care center providers (77.6 percent) find it most difficult to make ends meet.

Figure 9

Levels of Difficulty Family Home Providers Have Making Ends Meet in their Child Care Program

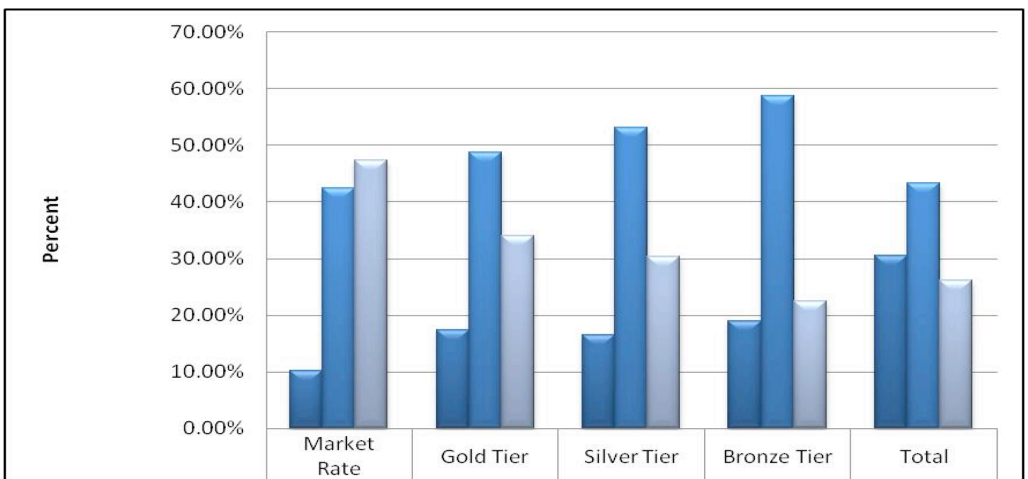


	Market Rate	Gold Tier	Silver Tier	Bronze Tier	Total
Very Difficult	21.20%	28.90%	19.50%	24.80%	18.70%
Somewhat Difficult	48.50%	27.40%	48.70%	59.20%	47.20%
Not at All Difficult	30.30%	43.70%	31.80%	16.00%	34.10%

Source: 2012 Market Rate Survey

Figure 10

Levels of Difficulty Child Care Center Providers Have Making Ends Meet in Their Child Care Program



	Market Rate	Gold Tier	Silver Tier	Bronze Tier	Total
Very Difficult	10.10%	17.30%	16.50%	18.90%	30.60%
Somewhat Difficult	42.50%	48.70%	53.20%	58.70%	43.30%
Not at All Difficult	47.40%	34.00%	30.30%	22.40%	26.10%

Source: 2012 Market Rate Survey *Note: Several child care center providers expressed no opinion on the level of difficulty; thus, percentages do not total 100%.*

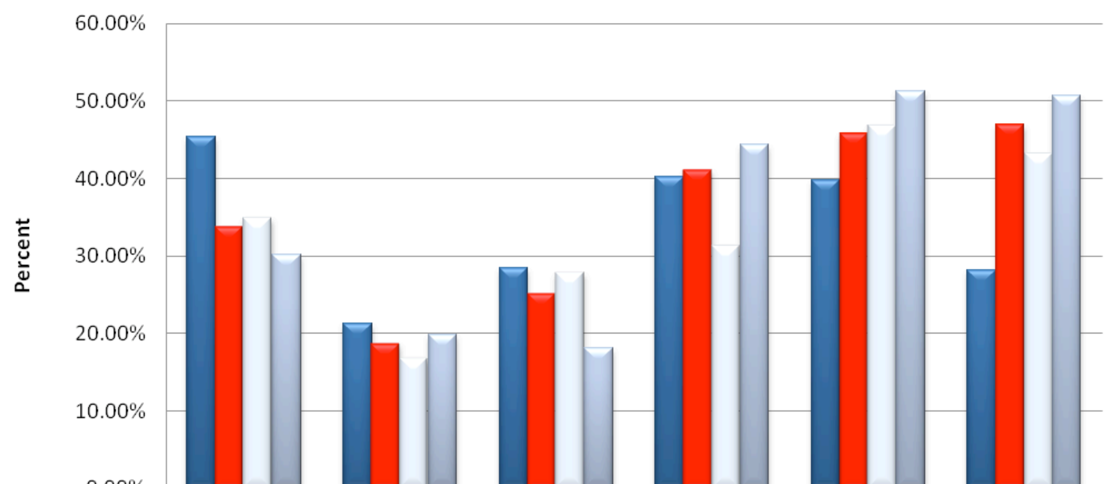
Challenges in Recruiting and Retaining Staff

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 competiton, 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: Low pay, low benefits and high competition. However, as illustrated in Figure 11, there are differences in challenges identified by tier level. Private child care center providers (45 percent) find their biggest challenge in the competitive environment, while gold tier child care center providers are most challenged by low benefits (46.9 percent). Both silver tier and bronze tier child care center providers find low pay and low benefits as their biggest challenges. Job stress is among the top three challenges for bronze tier providers.

FIGURE 11

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



	High Competition	Qualified People	Lack of Advancement	Job Stress	Low Pay	Low Benefits
Market Rate	45.30%	21.20%	28.40%	40.20%	39.80%	28.10%
Gold Tier	33.80%	18.70%	25.10%	41.10%	45.80%	46.90%
Silver Tier	34.90%	16.80%	27.80%	31.30%	46.80%	43.20%
Bronze Tier	30.10%	19.90%	18.10%	44.40%	51.20%	50.70%

Source: 2012 Market Rate Survey

Child Care Provider Recommendations (Priorities)

All providers were asked to state their recommendations and priorities related to e*arly* childhood services in the District. The following is a brief summary of key priorities:

OSSE Contract Child Care Providers

- Increase subsidy reimbursement rate
- Increase benefits to staff and teachers

For OSSE center and home contract providers, the number one expressed priority is the need to "increase the reimbursement rate." Some of these providers were even more direct by simply saying; "pay the market rate." Additionally, there is a sentiment among the OSSE contract providers that the tiered reimbursement rate needs to be "restructured" so the rate accurately reflects the "true cost of quality programming."

A second priority articulated by the OSSE providers included increased benefits for staff and teachers; specifically "health insurance" and "paid sick leave." Some providers drew on the example of DC Public School teachers as a parallel for reiterating the importance of their profession as child care providers.

Private Contract Child Care Providers

- Streamline licensing, immunization verification and renewal processes
- Increase the number of infant and toddler slots

Private contract providers expressed their top priority as "frustration" with the "inefficient" licensing, immunization verification and renewal processes. More directly, the process needs to be "streamlined," regulations enforced, and appropriate support before, during and after licensing process is critical. On a separate but related note, a few providers stated that the licensing application process/paperwork should be available in English and Spanish.

Another significant priority stated by the private providers was the need to increase the number of infant and toddler slots. Some providers stated that they should be allowed more than "two infants;" while others expressed that "the number of children should be raised in accordance with the space provided (like Maryland)." This is deemed a priority given that many DC public schools currently have pre-K programs; which ultimately affects the sustainability of existing childcare programs. An increase in the number of infants and toddlers would offset this current trend.

All Providers

- More training opportunities

The majority of providers noted the need for additional professional development and "more flexible" and "convenient" training opportunities. A slight distinction between OSSE contract providers and Private providers' vis-à-vis training is that the former emphasized "affordable" or even "free" trainings should be offered. The latter group suggested that the training classes be offered in "Espanol."

3. RECOMMENDATIONS

- Revise survey instrument for Market Rate study/project, specific questions need to be developed that address provider operating expenses vis-à-vis rate calculations.

- Increase the OSSE subsidy rate for child care providers; doing so, could potentially increase the response rate of the Market Rate Study. Some providers stated they were frustrated at having to respond to the survey, every two years, specifically because the reimbursement rate has not changed in years.

- Days of Operation: Qualitative and/or ethnographic research needed to explore /examine the following finding: non-traditional hours more readily available in Wards 7 & 8.

- Late fees should be analyzed against lower registration fees; both of which could potentially be used to "make-up" the difference of OSSE's low subsidy reimbursement rate.

- Conduct further analysis on reasons for not applying for accreditation.

- Further research regarding service to children with disabilities.

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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

Appendix A

Location of Non-Respondent Child Care Providers by Ward

2012

Ward	Family Home Providers		Center Providers	
	No.	%	No.	%
Ward 1	1	2.0	6	2.1
*Ward 2	N/A	N/A	30	47.0
Ward 3	1	3.3	13	3.8
Ward 4	13	36.1	12	3.0
Ward 5	2	1.0	12	3.0
Ward 6	5	22.0	17	39.0
Ward 7	5	14.3	3	1.0
Ward 8	5	21.3	3	1.0
Total	32	100%	96	100.0%

Source: 2012 Market Rate Survey. *NOTE: Ward 2 (family home providers) had 100% response rate and therefore was not included in the non-response calculation.

Appendix B

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

Service Group	75th Percentile	Median	Mean	Standard Deviation
Family home providers				
Infant Total Slots n=77	$50.80	$37.00	$41.01	$11.54
OSSE Contract n=36	$45.50	$36.00	$38.27	$8.73
Market Rate n=41	$59.75	$40.00	$44.40	$13.66
Age 1 Total Slots n=65	$47.04	$35.00	$38.54	$10.81
OSSE Contract n=44	$40.40	$35.00	$36.28	$8.26
Market Rate n=21	$50.00	$36.50	$41.46	$12.97
Age 2 Total Slots n=116	$46.50	$35.00	$37.62	$10.85
OSSE Contract n=70	$40.04	$33.00	$35.44	$8.23
Market Rate n=46	$50.22	$35.00	$40.47	$13.11
Age 3 Total Slots n=76	$44.75	$35.00	$36.83	$10.96
OSSE Contract n=63	$40.00	$34.00	$34.63	$8.11
Market Rate n=13	$50.01	$35.00	$40.01	$13.60
Age 4 Total Slots n=24	$40.02	$33.00	$35.32	$8.70
OSSE Contract n=15	$39.02	$30.00	$33.49	$7.58
Market Rate n=9	$51.02	$35.00	$38.13	$9.70
Full-time when school closed(5+)				
Total Slots n=8	$40.00	$33.00	$34.99	$8.72
OSSE Contract n=7	$41.05	$30.00	$34.37	$7.79
Market Rate n=1	$42.06	$33.00	$36.06	-
Child Care Centers				
Infant Total Slots n=1056	$72.03	$54.41	$57.92	$18.07
OSSE Contract n=667	$58.66	$50.00	$51.42	$13.22
Market Rate n=389	$84.48	$77.68	$74.11	$18.62
Age 1 Total Slots n=1498	$66.92	$55.00	$57.07	$16.46
OSSE Contract n=1071	$56.39	$50.60	$51.28	$11.74
Market Rate n=427	$78.98	$70.32	$68.58	$18.69
Age 2 Total Slots n=2567	$60.04	$50.40	$52.10	$15.44
OSSE Contract n=1944	$50.99	$46.26	$47.39	$12.17
Market Rate n=623	$72.05	$65.00	$62.27	$16.88
Age 3 Total Slots n=2557	$56.47	$42.50	$46.44	$16.12
OSSE Contract n=1908	$46.97	$40.00	$41.18	$12.47
Market Rate n=649	$66.60	$59.40	$57.37	$17.43
Age 4 Total Slots n=1525	$56.42	$42.00	$45.70	$15.64
OSSE Contract n=1020	$46.23	$39.20	$40.17	$12.25
Market Rate n=505	$65.08	$58.60	$56.85	$16.07
Full-time when school closed(5+)				
Total Slots n=706	$58.99	$42.00	$45.60	$17.47
OSSE Contract n=432	$46.97	$38.36	$39.38	$14.24
Market Rate n=274	$67.75	$60.46	$58.04	$16.85

Source: 2012 Market Rate Survey