

The State of Child Care in the Triangle

2011

The Triangle area of North Carolina (Durham, Orange and Wake Counties) is home to more than 200,000 children under age 18. About two-thirds of all parents of children birth to 5 years old in the Triangle, and almost three quarters of all parents with school-age children in the area are part of our local workforce, equating to more than 140,000 children in need of some kind of care, either for the entire parent workday or before or after school. For over 37,800 of these children, working parents have chosen licensed, center-based or home-based child care to meet this need.

North Carolina is fortunate to have a child care system that supports and protects consumers by helping child care providers aspire to levels of quality that can promote children's learning and support working families, and by offering enough transparency that parents know the basic elements of quality child care.

While basic information about quality is helpful to parents choosing care, our regional and statewide child care resource and referral system also supports parents in learning about the finer points that constitute quality in child care, as well as the availability and affordability of care. As parents search for child care, their questions revolve around the following areas:

- *Availability:* What kinds of programs are there to meet my needs? Are the location and hours of operation convenient? Will there be a space for my child?
- *Quality:* Will a child care program help my child grow and develop? Will there be educated teachers ready to prepare my child for school success? Will my child be safe, protected and happy?
- *Affordability:* What will child care cost our family? Can we really prioritize child care in our family's budget? Are there scholarships or tax credits that can help?

In 2010-11, Child Care Services Association's (CCSA) Consumer Education and Referral counselors fielded requests from more than 4,700 families with over 6,600 children, with these and more questions about choosing and using child care. As the Triangle's child care resource and referral agency, CCSA works each day to help connect families with child care that meets their needs and with resources that make child care more affordable. CCSA also works with child care providers and businesses to improve the quality of available child care by offering training, technical assistance, educational scholarships, nutrition resources, salary supplements and more. This State of Child Care Report is designed to further inform and educate all those invested in the availability, affordability and quality of area child care.



Addressing the Child Care Trilemma in the Triangle

Through direct services, research and advocacy, Child Care Services Association (CCSA) works to ensure that all children have the best start in life. Since 1974, CCSA has promoted high quality child care for children ages birth through five. Because research has demonstrated that quality early care and education lays the foundation for a lifetime of successful learning, CCSA works with thousands of families and early childhood professionals each year to guarantee that all children are receiving the best early care and education possible.

In particular, CCSA provides coordinated services that work on multiple fronts to address the trilemma of child care: the three dynamic, interdependent, and sometimes competing challenges of inadequate *availability, quality, and affordability of child care*.

Availability: Connecting families to quality child care

Sufficient supply of and access to needed types of child care are challenges faced by many Triangle families. CCSA's consumer education and referral department assists families in their search for available child care by offering information about North Carolina's child care system and how to identify high-quality early care and education. Counselors provide families with personalized lists of child care facilities that meet their needs and walk them through the steps to follow when choosing an early care and education setting. CCSA also provides data and technical assistance to inform the development and facilitate the start-up of new child care facilities to meet community needs.

Quality: Improving environments and the workforce

Quality of child care programs involves many aspects, including licensing, national accreditation, staff-to-child ratios, group size, teacher education levels, staff tenure and aspects of the physical facility.

CCSA's technical assistance consultants provide on-site assessments and customized assistance to help child care facilities improve the early care and education they provide. Consultants help centers and homes improve their classrooms and teaching practices, increase the number of stars on their child care licenses, apply for national accreditation and develop individualized professional development plans for staff members. CCSA also hosts a variety of trainings and workshops throughout the Triangle to help local child care providers learn the latest in child development and create high-quality learning environments and activities for the children in their care.

Because teacher education levels are a key indicator of quality, CCSA's T.E.A.C.H. Early Childhood® Project awards thousands of child care providers with scholarships to take college courses leading to credentials and degrees in early childhood education. CCSA's Child Care WAGE\$® Project provides education-based salary supplements to early childhood professionals who have remained in the same child care program for at least six months. By reducing turnover and encouraging providers to continue their education, WAGE\$ helps to ensure that children are being cared for in a stable environment by qualified, justly compensated professionals.

Affordability: Helping families afford quality care

Quality child care is very expensive to provide and very few families can afford to pay more than 10% of their gross income for child care. CCSA provides eligible families with child care scholarships to enable children to attend high-quality 3, 4 or 5-star child care facilities. CCSA counselors also work with families to identify other financial resources and strategies to help make child care more affordable, such as tax credits, program discounts, and flexible spending accounts.



CCSA Services in the Triangle in FY11		Durham	Orange	Wake
Consumer Education and Referral	Families Served	2,023	473	2,163
	Children Impacted	2,860	624	3,197
Technical Assistance	Programs Participating	125	31	90
	Classrooms Served	376	134	375
Trainings Services	Trainings Conducted	148	107	146
	Professionals Trained	908	337	1,233
T.E.A.C.H.	Participants Awarded Scholarships	246	63	320
WAGE\$	Participants Receiving Salary Supplements	322	113	n/a
Scholarship	Children Receiving Assistance	1,189	306	n/a

Infant and Toddler Care in the Triangle (Ages Birth - 2 years)

Need

	Durham	Orange	Wake
Total number of children under age 3	13,014	4,016	39,276
Percent of children under age 6 with all parents working	68%	63%	61%
Estimated number of children under 3 needing child care	8,850	2,530	23,958
Rate of poverty among children under age 6	22%	15%	14%
Estimated number of children under age 3 living in poverty	2,863	602	5,499
Rate of poverty or low-income status of children under age 6	45%	37%	32%
Estimated number of children under age 3 in poor or low-income families	5,856	1,486	12,568
Average family size, including married-couple and single-parent families	3.01	2.92	3.21



Families with infants and toddlers in Durham and Orange Counties are most likely to use 4 or 5 star care, whether choosing center-based or home-based care. In Wake County, while 5-star infant and toddler care is the most commonly used center-based care, children under age 3 in home-based care are most likely to be enrolled in care of the lowest quality.

Availability

In Child Care Centers

Number of regulated child care centers that provide infant and toddler care	126	48	271
Estimated capacity for infants and toddlers in licensed child care centers	3,381	1,069	10,350
Type of child care center in which infants and toddlers are most commonly enrolled	5-star	5-star	5-star
Percent of spaces open in child care centers for new infant and toddler enrollment in the most commonly used type of care	10%	7%	13%

in Family Child Care Homes

Number of regulated family child care homes that provide infant and toddler care	193	31	301
Estimated capacity for infants and toddlers in licensed child care homes	589	93	899
Type of family child care home in which infants and toddlers are most commonly enrolled	3-star	5-star	1-star
Percent of spaces open in family child care homes for new infant and toddler enrollment in the most commonly used type of care	37%	30%	17%

Quality

in Child Care Centers

Percent of infant and toddler providers offering care at 4 or 5 star quality	50%	71%	54%
Percent of infants and toddlers enrolled in 4- or 5-star child care centers	61%	74%	67%
Number of NAEYC-accredited child care centers serving infants and toddlers	6	6	5

in Family Child Care Homes

Percent of infant and toddler providers offering care at 4 or 5 star quality	43%	68%	25%
Percent of infants and toddlers enrolled in 4- or 5-star family child care homes	41%	62%	25%
Number of NAFCC-accredited family child care homes serving infants and toddlers	3	1	3

Of the three Triangle counties, the rate of poverty among children under six is highest and the median family income lowest in Durham County, yet the cost of care in Durham does not differ greatly from that in Orange or Wake Counties. Orange County infant and toddler care is consistently the most expensive of all three counties.

Affordability

Median annual income for a family with children under 18	\$53,862	\$78,857	\$80,726
Annual income for a NC family of three at \$1 over eligibility for subsidy assistance		\$42,828	

in Child Care Centers

Median monthly fee for full-time care for an infant in the most commonly used care	\$1,205	\$1,295	\$1,271
Cost of this type of care as a percentage of annual income for a family \$1 over eligibility for subsidy assistance	34%	36%	36%

in Family Child Care Homes

Median monthly fee for full-time care for an infant in the most commonly used care	\$714	\$950	\$736
Cost of this type of care as a percentage of annual income for a family \$1 over eligibility for subsidy assistance	20%	27%	21%

Preschool Care in the Triangle (Ages 3-5 years)

Need

	Durham	Orange	Wake
Total number of preschool children age 3-5	8,274	3,619	29,438
Percent of children under age 6 with all parents working	68%	63%	61%
Estimated number of preschoolers needing child care	5,626	2,280	17,957
Rate of poverty among children under 6	22%	15%	14%
Estimated number of preschoolers living in poverty	1,821	560	4,022
Rate of poverty or low-income status among children under 6	45%	37%	32%
Estimated number of preschoolers in poor or low-income families	3,723	1,339	9,420
Average family size, including married-couple and single-parent families	3.01	2.92	3.21



More than half of all licensed child care centers serving preschoolers in all three counties offer care at the 4- or 5-star quality level, though Orange County boasts the highest percentage of both centers and homes operating at the highest levels of quality. There are also a higher number of nationally-accredited programs serving preschool children across the Triangle than those serving other age groups.

Availability

<i>In Child Care Centers</i>			
Number of regulated child care centers that provide preschool care	139	63	290
Estimated capacity for preschoolers in licensed child care centers	4,397	1,636	12,044
Type of child care center in which preschoolers are most commonly enrolled	5-star	5-star	5-star
Percent of spaces open in child care centers for new preschool enrollment in the most commonly used type of care	9%	1%	12%
<i>in Family Child Care Homes</i>			
Number of regulated family child care homes that provide preschool care	188	31	282
Estimated capacity for preschoolers in licensed child care homes	381	63	527
Type of family child care home in which preschoolers are most commonly enrolled	4-star	5-star	1-star
Percent of spaces open in family child care homes for new preschool enrollment in the most commonly used type of care	18%	0%	19%

Quality

<i>in Child Care Centers</i>			
Percent of preschool providers offering care at 4 or 5 star quality	53%	78%	55%
Percent of preschoolers enrolled in 4- or 5-star child care centers	60%	81%	66%
Number of NAEYC-accredited child care centers serving preschoolers	7	6	7
<i>in Family Child Care Homes</i>			
Percent of preschool providers offering care at 4 or 5 star quality	44%	68%	25%
Percent of preschoolers enrolled in 4- or 5-star family child care homes	44%	67%	24%
Number of NAFCC-accredited family child care homes serving preschoolers	3	1	3

North Carolina's subsidized preschool program, NCPReK (formerly More at Four), has a significant impact on making high-quality preschool care available to all three communities and increasing the access of low-income children to these programs.

Affordability

Median annual income for a family with children under 18	\$53,862	\$78,857	\$80,726
Annual income for a NC family of three at \$1 over eligibility for subsidy assistance		\$42,828	
<i>in Child Care Centers</i>			
Median monthly fee for full-time care for a 4-year-old in the most commonly used care	\$844	\$935	\$888
Cost of this type of care as a percentage of annual income for a family \$1 over eligibility for subsidy assistance	24%	26%	25%
<i>in Family Child Care Homes</i>			
Median monthly fee for full-time care for 4-year-old in the most commonly used care	\$650	\$866	\$650
Cost of this type of care as a percentage of annual income for a family \$1 over eligibility for subsidy assistance	18%	24%	18%

School-Age Care in the Triangle (Ages 5-12 years)

Need

	Durham	Orange	Wake
Total number of school-age children ages 5-11	20,927	9,424	80,343
Percent of children 6 and over with all parents working	79%	73%	71%
Estimated number of school-age children needing child care	16,532	6,879	57,043
Rate of poverty among children 6 and over	17%	12%	10%
Estimated number of school-age children living in poverty	3,558	1,131	8,034
Rate of poverty or low-income status among children 6 and over	40%	31%	26%
Estimated number of school-age children in poor or low-income families	8,371	2,921	20,889
Average family size, including married-couple and single-parent families	3.01	2.92	3.21



In both Durham and Orange Counties, the county school districts operate regulated, 3 to 5-star child care programs, helping to improve the availability, affordability and quality of child care options for families. In Wake County, school-age child care options are dominated by unregulated programs and the most common licensed care is at the 1-star level. School-age care in Wake County is a particularly complex need due to the mix of traditional and year-round calendars used by schools in the district.

Availability

<i>In Child Care Centers</i>			
Number of regulated child care centers that provide school-age care	82	34	198
Estimated capacity for school-age children in licensed child care centers	3,906	2,448	7,286
Type of child care center in which school-age children are most commonly enrolled	5-star	5-star	1-star
Percent of spaces open in child care centers for new school-age enrollment in the most commonly used type of care	19%	4%	18%
<i>in Family Child Care Homes</i>			
Number of regulated family child care homes that provide school-age care	150	21	109
Estimated capacity for school-age children in licensed child care homes	447	61	216
Type of family child care home in which school-age children are most commonly enrolled	4-star	3-star	1-star
Percent of spaces open in family child care homes for new school-age enrollment in the most commonly used type of care	33%	0%	13%

Quality

<i>in Child Care Centers</i>			
Percent of school-age providers offering care at 4 or 5 star quality	61%	79%	48%
Percent of school-age children enrolled in 4- or 5-star child care centers	85%	96%	43%
Number of NAEYC- or NAA-accredited child care centers serving school-age children	1	9	2
<i>in Family Child Care Homes</i>			
Percent of school-age providers offering care at 4 or 5 star quality	47%	67%	29%
Percent of school-age children enrolled in 4- or 5-star family child care homes	45%	48%	25%
Number of NAFCC-accredited family child care homes serving school-age children	2	1	3

Affordability

Median annual income for a family with children under 18	\$53,862	\$78,857	\$80,726
Annual income for a NC family of three at \$1 over eligibility for subsidy assistance		\$42,828	
<i>in Child Care Centers</i>			
Median monthly fee for part-time care for a school-age child in the most commonly used care	\$165	\$210	\$165
Cost of this type of care as a percentage of annual income for a family \$1 over eligibility for subsidy assistance	5%	6%	5%
<i>in Family Child Care Homes</i>			
Median monthly fee for part-time care for a school-age child in the most commonly used care	\$260	\$400	\$200
Cost of this type of care as a percentage of annual income for a family \$1 over eligibility for subsidy assistance	7%	11%	6%

Helpful definitions...

Star-rated licenses and national accreditation – In North Carolina, the license system evaluates the quality of care that a program provides against research-based predictors of quality, such as teacher education, staff-child ratios and the child care environment. Programs are then rated on a scale of 1 to 5 stars, with more stars typically predicting higher-quality care.

Some child care facilities choose to participate in a voluntary national accreditation assessment, such as those conducted by the National Association for the Education of Young Children (NAEYC), the National Association of Family Child Care (NAFCC) and the National AfterSchool Association (NAA). Becoming nationally accredited does not impact a center's star rated license, but it is an additional demonstration of quality.

Child care subsidy – In each county across North Carolina, funds are available to help families pay for child care. Eligibility for the child care subsidy program is most often based on the need for child care and income. For more information on child care subsidies, visit the NC Division of Child Development Web site at http://ncchildcare.dhhs.state.nc.us/parents/pr_sn2_ov_fa.asp.

All data for this report was compiled from the following sources:

1. Family Support Department Database, Child Care Services Association, May 2011
2. Child Care Statistical Detail Report, NC Division of Child Development & Early Education, May 2011
3. Child Care Subsidy Income Eligibility Limits, NC Division of Child Development & Early Education, August 2011
4. 2005-2009 American Community Survey, U.S. Census Bureau

*...ensuring affordable,
accessible, high-quality
child care for all
young children.*



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