



# The State of CHILD CARE in the TRIANGLE

The Triangle area of North Carolina (Durham, Orange and Wake Counties) is home to more than 221,000 children under age 12. About two-thirds of all parents of children birth to five 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. This equates to more than 156,000 children birth to 12 years old in need of some kind of care, either for the entire parent workday or before or after school. For over 37,000 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 and families by helping child care providers aspire to levels of quality that can promote children's learning, and by offering enough transparency that parents know the basic elements of quality child care.

Child Care Services Association's (CCSA's) regional and statewide child care resource and referral system supports parents in learning what constitutes quality in child care, as well as the availability and affordability of care. As parents begin their search for child care, common questions and concerns in these areas include the following:

- **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 FY 2014–2015, CCSA Consumer Education and Referral counselors fielded requests from more than 2,500 families with over 3,300 children, with these and more questions about choosing and using child care. As the Triangle region'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 report is designed to further inform and educate those invested in the availability, affordability and quality of area child care.

# Child Care Services Association

## ADDRESSING THE CHILD CARE TRILEMMA IN THE TRIANGLE

Through direct services, research and advocacy, 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 searching 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 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 facilitate the start-up of new child care facilities to meet community needs.

### QUALITY: Improving environments and the workforce

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

CCSA's technical assistance team provides 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 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 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 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 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 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. In addition, CCSA counselors help connect eligible families with publicly funded programs including Early Head Start, Head Start, North Carolina's Prekindergarten Program and child care subsidy programs through local Departments of Social Services and Smart Start.

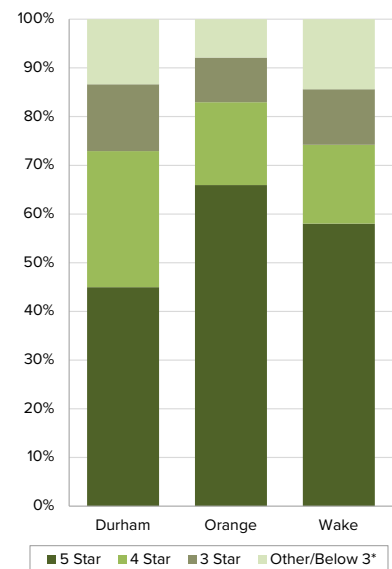
CCSA services to the Triangle in FY15	Durham	Orange	Wake	Total Triangle
<b>Consumer Education and Referral</b>				
Families Served	1,123	238	907	2,268
Children Impacted	1,506	313	1,245	3,064
<b>Technical Assistance</b>				
Programs Participating	66	34	68	168
Classrooms Served	213	78	250	541
<b>Professional Development Services</b>				
Workshops & Learning Events Conducted	106	116	105	327
Professionals Participating	799	351	1,371	2,521
<b>T.E.A.C.H.</b>				
Participants Awarded Scholarships	184	44	220	448
<b>WAGE\$</b>				
Participants Receiving Salary Supplements	247	32	0	279
<b>Scholarships</b>				
Children Receiving Assistance	631	73	5	709



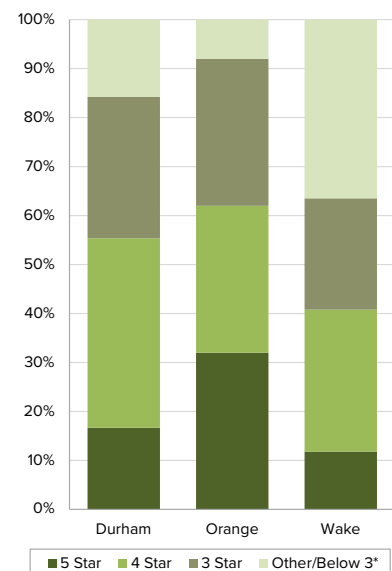
# Infant and Toddler Care in the Triangle (AGES BIRTH TO 3)

	Triangle Counties		
	Durham	Orange	Wake
<b>NEED</b>			
Total number of children under age 3	12,357	3,883	38,661
Percent of children under age 6 with all parents working	70%	62%	66%
Estimated number of children under 3 needing child care	8,650	2,407	25,516
Rate of poverty among children under age 6	27%	23%	17%
Estimated number of children under age 3 living in poverty	3,336	893	6,572
Rate of poverty or low-income status of children under age 6	52%	40%	35%
Estimated number of children under age 3 in poor or low-income families	6,426	1,553	13,531
Average family size, including married-couple and single-parent families	2.98	3.02	3.18
<b>AVAILABILITY</b>			
<i>in Child Care Centers</i>			
Number of regulated child care centers that provide infant and toddler care	115	41	265
Estimated capacity for infants and toddlers in licensed child care centers	3,455	1,150	10,116
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	11%	5%	18%
<i>in Family Child Care Homes</i>			
Number of regulated family child care homes that provide infant and toddler care	149	23	196
Estimated capacity for infants and toddlers in licensed child care homes	465	64	597
Type of family child care home in which infants and toddlers are most commonly enrolled	4-Star	5-Star	4-Star
Percent of spaces open in family child care homes for new infant and toddler enrollment in the most commonly used type of care	29%	20%	28%
<b>QUALITY</b>			
<i>in Child Care Centers</i>			
Average star-rating of child care centers serving infants and toddlers	3.81	4.29	3.96
Percent of infant and toddler providers offering care at 4- or 5-star quality	70%	78%	67%
Percent of infants and toddlers enrolled in 4- or 5-star child care centers	73%	83%	74%
Number of NAEYC-accredited child care centers serving infants and toddlers	7	5	6
<i>in Family Child Care Homes</i>			
Average star-rating of family child care homes serving infants and toddlers	3.46	3.78	2.94
Percent of infant and toddler providers offering care at 4- or 5-star quality	56%	65%	42%
Percent of infants and toddlers enrolled in 4- or 5-star family child care homes	55%	62%	41%
Number of NAFCC-accredited family child care homes serving infants and toddlers	0	0	0
<b>AFFORDABILITY</b>			
Median annual income for a family with children under 18	\$54,468	\$85,776	\$80,956
Annual income for a NC family of three at \$1 over eligibility for subsidy assistance	\$40,177		
Number of infants and toddlers receiving state child care subsidies	712	274	1,433
<i>in Child Care Centers</i>			
Median monthly fee for full-time care for an infant in the most commonly used care	\$1,089	\$1,225	\$1,140
Cost of this type of care as a percentage of annual income for a family \$1 over eligibility for subsidy assistance	33%	37%	34%
<i>in Family Child Care Homes</i>			
Median monthly fee for full-time care for an infant in the most commonly used care	\$758	\$975	\$800
Cost of this type of care as a percentage of annual income for a family \$1 over eligibility for subsidy assistance	23%	29%	24%

**Infant and Toddler Enrollment in Child Care Centers by Quality Level**



**Infant and Toddler Enrollment in Family Child Care Homes by Quality Level**

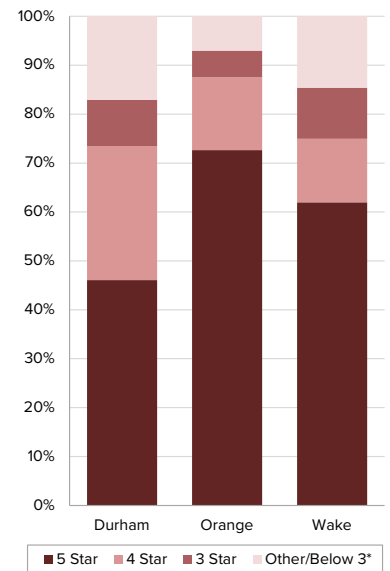




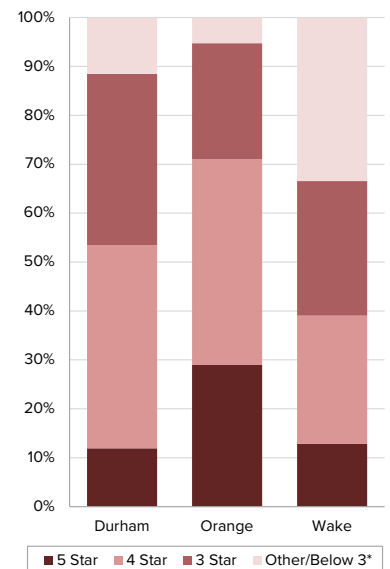
# Preschool Care in the Triangle (AGES 3-5)

	Triangle Counties		
	Durham	Orange	Wake
<b>NEED</b>			
Total number of preschool children age 3-5	9,075	3,503	31,062
Percent of children under age 6 with all parents working	70%	62%	66%
Estimated number of preschoolers needing child care	6,353	2,172	20,501
Rate of poverty among children under 6	27%	23%	17%
Estimated number of preschoolers living in poverty	2,450	806	5,281
Rate of poverty or low-income status among children under 6	52%	40%	35%
Estimated number of preschoolers in poor or low-income families	4,719	1,401	10,872
Average family size, including married-couple and single-parent families	2.98	3.02	3.18
<b>AVAILABILITY</b>			
<i>in Child Care Centers</i>			
Number of regulated child care centers that provide preschool care	131	54	280
Estimated capacity for preschoolers in licensed child care centers	3,920	1,650	12,795
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	10%	5%	14%
<i>in Family Child Care Homes</i>			
Number of regulated family child care homes that provide preschool care	142	22	188
Estimated capacity for preschoolers in licensed child care homes	293	45	389
Type of family child care home in which preschoolers are most commonly enrolled	4-Star	4-Star	3-Star
Percent of spaces open in family child care homes for new preschool enrollment in the most commonly used type of care	16%	6%	17%
<b>QUALITY</b>			
<i>in Child Care Centers</i>			
Average star-rating of child care centers serving preschoolers	3.71	4.43	3.98
Percent of preschool providers offering care at 4- or 5-star quality	72%	83%	69%
Percent of preschoolers enrolled in 4- or 5-star child care centers	73%	88%	75%
Number of NAEYC-accredited child care centers serving preschoolers	9	4	11
<i>in Family Child Care Homes</i>			
Average star-rating of family child care homes serving preschoolers	3.46	3.89	2.95
Percent of preschool providers offering care at 4- or 5-star quality	56%	68%	41%
Percent of preschoolers enrolled in 4- or 5-star family child care homes	53%	71%	39%
Number of NAFCC-accredited family child care homes serving preschoolers	0	0	0
<b>AFFORDABILITY</b>			
Median annual income for a family with children under 18	\$54,468	\$85,776	\$80,956
Annual income for a NC family of three at \$1 over eligibility for subsidy assistance	\$40,177		
Number of preschoolers receiving state child care subsidies	849	303	1,890
<i>in Child Care Centers</i>			
Median monthly fee for full-time care for a 4-year-old in the most commonly used care	\$900	\$995	\$953
Cost of this type of care as a percentage of annual income for a family \$1 over eligibility for subsidy assistance	27%	30%	28%
<i>in Family Child Care Homes</i>			
Median monthly fee for full-time care for 4-year-old in the most commonly used care	\$693	\$823	\$563
Cost of this type of care as a percentage of annual income for a family \$1 over eligibility for subsidy assistance	21%	25%	17%

**Preschool Age Enrollment in Child Care Centers by Quality Level**



**Preschool Age Enrollment in Family Child Care Homes by Quality Level**

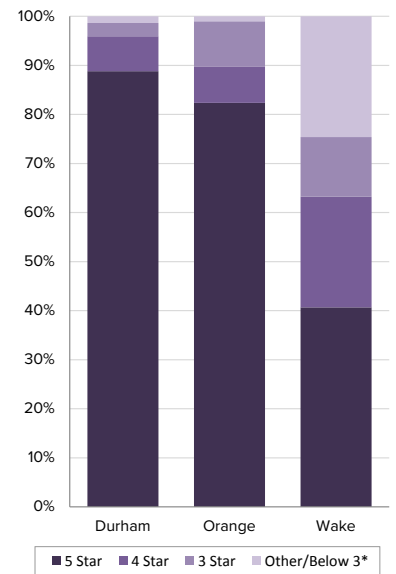




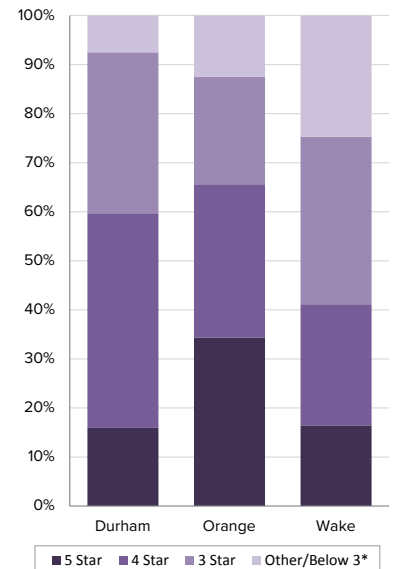
# School-Age Care in the Triangle (AGES 5-12)

	Triangle Counties		
	Durham	Orange	Wake
<b>NEED</b>			
Total number of school-age children ages 5-11	21,971	10,986	90,314
Percent of children 6 and over with all parents working	76%	73%	73%
Estimated number of school-age children needing child care	16,698	8,020	65,929
Rate of poverty among children 6 and over	24%	14%	13%
Estimated number of school-age children living in poverty	5,273	1,538	11,741
Rate of poverty or low-income status among children 6 and over	48%	29%	31%
Estimated number of school-age children in poor or low-income families	10,546	3,186	27,997
Average family size, including married-couple and single-parent families	2.98	3.02	3.18
<b>AVAILABILITY</b>			
<i>in Child Care Centers</i>			
Number of regulated child care centers that provide school-age care	94	30	176
Estimated capacity for school-age children in licensed child care centers	4,633	2,439	5,929
Type of child care center in which school-age children are most commonly enrolled	5-Star	5-Star	5-Star
Percent of spaces open in child care centers for new school-age enrollment in the most commonly used type of care	19%	5%	12%
<i>in Family Child Care Homes</i>			
Number of regulated family child care homes that provide school-age care	123	17	88
Estimated capacity for school-age children in licensed child care homes	360	41	186
Type of family child care home in which school-age children are most commonly enrolled	4-Star	5-Star	3-Star
Percent of spaces open in family child care homes for new school-age enrollment in the most commonly used type of care	8%	21%	4%
<b>QUALITY</b>			
<i>in Child Care Centers</i>			
Average star-rating of child care centers serving school-age children	4.81	4.69	3.53
Percent of school-age providers offering care at 4- or 5-star quality	80%	77%	70%
Percent of school-age children enrolled in 4- or 5-star child care centers	96%	90%	63%
Number of NAEYC- or NAA-accredited child care centers serving school-age children	2	0	3
<i>in Family Child Care Homes</i>			
Average star-rating of family child care homes serving school-age children	3.63	3.75	3.16
Percent of school-age providers offering care at 4- or 5-star quality	58%	71%	52%
Percent of school-age children enrolled in 4- or 5-star family child care homes	60%	66%	41%
Number of NAFCC-accredited family child care homes serving school-age children	0	0	0
<b>AFFORDABILITY</b>			
Median annual income for a family with children under 18	\$54,468	\$85,776	\$80,956
Annual income for a NC family of three at \$1 over eligibility for subsidy assistance for a school-age child	\$26,725		
Number of school-age children receiving state child care subsidies	561	219	1,403
<i>in Child Care Centers</i>			
Median monthly fee for part-time care for a school-age child in the most commonly used care	\$175	\$225	\$368
Cost of this type of care as a percentage of annual income for a family \$1 over eligibility for subsidy assistance	8%	10%	17%
<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	\$282	\$412	\$250
Cost of this type of care as a percentage of annual income for a family \$1 over eligibility for subsidy assistance	13%	18%	11%

**School-Age Enrollment in Child Care Centers by Quality Level**



**School-Age Enrollment in Family Child Care Homes by Quality Level**



# Helpful definitions

## Star-rated licenses and national accreditation

In North Carolina, the licensing 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) and the National Association of Family Child Care (NAFCC). Becoming nationally accredited does not impact a center's star rated license, but is an additional demonstration of quality.



## Child care subsidy

In each county across North Carolina, state funds are available to help families pay for child care, typically through county departments of human or social services. 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 & Early Education Web site at [http://ncchildcare.nc.gov/parents/pr\\_sn2\\_ov\\_fa.asp](http://ncchildcare.nc.gov/parents/pr_sn2_ov_fa.asp).

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

1. *Family Support Department/Child Care Referral Database*, Child Care Services Association, April 2015
2. *Child Care Facility Data*, NC Division of Child Development & Early Education, April 2015
3. *Child Care Subsidy Income Eligibility Limits*, NC Division of Child Development & Early Education, April 2015
4. *Child Care Subsidy Services Data for Service Month April 2015*, NC Division of Child Development & Early Education, May 2015
5. *2009–2013 American Community Survey*, U.S. Census Bureau

Data related to licensure, capacity, enrollment and vacancies comes from Child Care Services Association's (CCSA) referral database, which includes data gathered directly, by self-report, from child care providers in the community and from the Division of Child Development and Early Education. Data on tuition rates comes strictly from CCSA's referral database. Enrollment in CCSA's referral program is voluntary, thus data may not be fully representative of all providers in a specified area, as there may be cases where providers have chosen not to participate and provide information. Median rates reflect the mid-point of rates being charged by child care programs and in the case of weighted rates (for the Triangle counties), the point at which half of actual enrolled families are paying more and half are paying less for care. Monthly rates are for full-time care except as noted for School Age children.



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For a comprehensive list of funders, please see our latest annual report at [www.childcareservices.org](http://www.childcareservices.org).