



The State of CHILD CARE in REGION 12

Region 12 of North Carolina's Child Care Resource & Referral (CCR&R) system, comprised of Alamance, Caswell, Durham, Franklin, Granville, Orange, Person, Vance and Wake counties, is home to nearly 280,000 children under age 12. Over 70% of all parents with children 0–12 years old in the region are part of our local workforce. This equates to more than 197,000 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 50,000 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.

North Carolina'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, Region 12's Consumer Education and Referral service, Child Care Referral Central, fielded requests from more than 2,500 families with over 3,300 children, with these and more questions about choosing and using child care. Child Care Referral Central works each day to help connect families with child care that meets their needs and with resources that make child care more affordable. Region 12's

CCR&R agencies, comprised of Child Care Services Association and the Alamance, Caswell, Person and Franklin-Granville-Vance Partnerships for Children, also work 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 Resource and Referral in North Carolina

ADDRESSING THE CHILD CARE TRILEMMA

Child Care Resource & Referral (CCR&R) refers to an interrelated set of services to families, child care providers, employers, and communities that:

- facilitate access to early care and education and school-age child care options for families;
- improve the quality of those child care options; and
- provide objective information for planning and policy development to the public and private sectors.

CCR&R services are available in each of North Carolina's 100 counties through the state's regional system of CCR&R agencies. Overall, there are 14 regional CCR&R agencies across the state working with a variety of local organizations to serve North Carolina's diverse families, child care programs, professional workforce and communities. **Region 12** of North Carolina's CCR&R system is comprised of Alamance, Caswell, Durham, Franklin, Granville, Orange, Person, Vance and Wake counties, and is served by Child Care Services Association and the Alamance, Caswell, Person and Franklin-Granville-Vance Partnerships for Children.

CCR&R agencies provide 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 families. Consumer Education and Referral services assist 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. CCR&R's also provide 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.

CCR&R technical assistance teams 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 stars on their child care licenses, apply for national accreditation and develop individualized professional development plans for staff members. CCR&R's also host a variety of trainings throughout the state 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.

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. Some of North Carolina's CCR&R agencies provide eligible families with child care subsidies or scholarships to enable children to attend high-quality child care facilities. CCR&R referral 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, CCR&R referral 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.

REGION 12 CCR&R SERVICES IN FY15:

Alamance, Caswell, Durham, Franklin, Granville, Orange, Person, Vance, Wake counties

Service Type	Number Served
Consumer Education and Referral	
Families Served	2,508
Children Impacted	3,395
Technical Assistance	
Programs Participating	258
Classrooms Served	681
Professional Development Services	
Workshops & Learning Events Conducted	431
Professionals Participating	3,193
Subsidies/Scholarships	
Children Receiving Assistance	710



Infant and Toddler Care in Region 12 (AGES BIRTH TO 3)

	Alamance	Caswell	Durham	Franklin	Granville	Orange	Person	Vance	Wake
NEED									
Total number of children under age 3	5,612	575	12,357	1,811	1,865	3,883	1,456	1,836	38,661
Percent of children under age 6 with all parents working	74%	73%	70%	64%	60%	62%	62%	67%	66%
Estimated number of children under 3 needing child care	4,153	420	8,650	1,159	1,119	2,407	903	1,230	25,516
Rate of poverty among children under age 6	34%	38%	27%	23%	30%	23%	31%	50%	17%
Estimated number of children under age 3 living in poverty	1,908	219	3,336	417	560	893	451	918	6,572
Rate of poverty or low-income status of children under age 6	58%	63%	52%	61%	52%	40%	54%	75%	35%
Estimated number of children under age 3 in poor or low-income families	3,255	362	6,426	1,105	970	1,553	786	1,377	13,531
Average family size, including married-couple and single-parent families	3.02	2.99	2.98	3.03	3.26	3.02	3.09	3.29	3.18
AVAILABILITY									
<i>in Child Care Centers</i>									
Number of regulated child care centers that provide infant and toddler care	46	4	115	16	16	41	7	17	265
Estimated capacity for infants and toddlers in licensed child care centers	1,108	118	3,455	386	399	1,150	129	340	10,116
Type of child care center in which infants and toddlers are most commonly enrolled	5-Star	4-Star	5-Star	4-Star	4-Star	5-Star	5-Star	4-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	9%	8%	11%	15%	22%	5%	18%	22%	18%
<i>in Family Child Care Homes</i>									
Number of regulated family child care homes that provide infant and toddler care	21	3	149	6	13	23	21	24	196
Estimated capacity for infants and toddlers in licensed child care homes	61	20	465	41	36	64	62	108	597
Type of family child care home in which infants and toddlers are most commonly enrolled	3-Star	1-Star	4-Star	1-Star	3-Star	5-Star	4-Star	3-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	11%	10%	29%	0%	17%	20%	26%	21%	28%
QUALITY									
<i>in Child Care Centers</i>									
Average star-rating of child care centers serving infants and toddlers	3.67	3.28	3.81	3.68	3.06	4.29	4.17	3.65	3.96
Percent of infant and toddler providers offering care at 4- or 5-star quality	61%	50%	70%	75%	56%	78%	71%	47%	67%
Percent of infants and toddlers enrolled in 4- or 5-star child care centers	68%	55%	73%	66%	62%	83%	89%	58%	74%
Number of NAEYC-accredited child care centers serving infants and toddlers	1	0	7	0	0	5	0	0	6
<i>in Family Child Care Homes</i>									
Average star-rating of family child care homes serving infants and toddlers	2.45	1.00	3.46	2.39	2.73	3.78	2.94	3.57	2.94
Percent of infant and toddler providers offering care at 4- or 5-star quality	38%	0%	56%	33%	31%	65%	52%	50%	42%
Percent of infants and toddlers enrolled in 4- or 5-star family child care homes	24%	0%	55%	42%	27%	62%	45%	51%	41%
Number of NAFCC-accredited family child care homes serving infants and toddlers	0	0	0	0	0	0	0	0	0
AFFORDABILITY									
Median annual income for a family with children under 18	\$49,783	\$42,659	\$54,468	\$48,031	\$57,154	\$85,776	\$50,729	\$33,032	\$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	395	31	712	142	100	274	82	237	1,433
<i>in Child Care Centers</i>									
Median monthly fee for full-time care for an infant in the most commonly used care	\$689	\$590	\$1,089	\$617	\$671	\$1,225	\$660	\$563	\$1,140
Cost of this type of care as a percentage of annual income for a family \$1 over eligibility for subsidy assistance	21%	18%	33%	18%	20%	37%	20%	17%	34%
<i>in Family Child Care Homes</i>									
Median monthly fee for full-time care for an infant in the most commonly used care	\$602	\$368	\$758	\$480	\$500	\$975	\$585	\$400	\$800
Cost of this type of care as a percentage of annual income for a family \$1 over eligibility for subsidy assistance	18%	11%	23%	14%	15%	29%	17%	12%	24%



Preschool Care in Region 12 (AGES 3-5)

	Alamance	Caswell	Durham	Franklin	Granville	Orange	Person	Vance	Wake
NEED									
Total number of preschool children age 3-5	4,475	694	9,075	2,265	1,531	3,503	1,012	1,424	31,062
Percent of children under age 6 with all parents working	74%	73%	70%	64%	60%	62%	62%	67%	66%
Estimated number of preschoolers needing child care	3,312	507	6,353	1,450	919	2,172	627	954	20,501
Rate of poverty among children under 6	34%	38%	27%	23%	30%	23%	31%	50%	17%
Estimated number of preschoolers living in poverty	1,522	264	2,450	521	459	806	314	712	5,281
Rate of poverty or low-income status among children under 6	58%	63%	52%	61%	52%	40%	54%	75%	35%
Estimated number of preschoolers in poor or low-income families	2,596	437	4,719	1,382	796	1,401	546	1,068	10,872
Average family size, including married-couple and single-parent families	3.02	2.99	2.98	3.03	3.26	3.02	3.09	3.29	3.18
AVAILABILITY									
<i>in Child Care Centers</i>									
Number of regulated child care centers that provide preschool care	66	7	131	23	25	54	11	28	280
Estimated capacity for preschoolers in licensed child care centers	1,869	178	3,920	519	603	1,650	392	695	12,795
Type of child care center in which preschoolers are most commonly enrolled	5-Star	5-Star	5-Star	4-Star	5-Star	5-Star	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	4%	0%	10%	13%	0%	5%	6%	1%	14%
<i>in Family Child Care Homes</i>									
Number of regulated family child care homes that provide preschool care	21	3	142	5	14	22	21	23	188
Estimated capacity for preschoolers in licensed child care homes	49	13	293	34	34	45	44	70	389
Type of family child care home in which preschoolers are most commonly enrolled	1-Star	1-Star	4-Star	4-Star	3-Star	4-Star	4-Star	3-Star	3-Star
Percent of spaces open in family child care homes for new preschool enrollment in the most commonly used type of care	11%	0%	16%	0%	23%	6%	39%	10%	17%
QUALITY									
<i>in Child Care Centers</i>									
Average star-rating of child care centers serving preschoolers	4.14	4.34	3.71	3.74	3.84	4.43	4.52	4.14	3.98
Percent of preschool providers offering care at 4 or 5 star quality	70%	71%	72%	61%	72%	83%	73%	64%	69%
Percent of preschoolers enrolled in 4- or 5-star child care centers	78%	85%	73%	63%	77%	88%	90%	81%	75%
Number of NAEYC-accredited child care centers serving preschoolers	3	0	9	0	0	4	0	0	11
<i>in Family Child Care Homes</i>									
Average star-rating of family child care homes serving preschoolers	2.41	1.00	3.46	2.62	2.94	3.89	2.74	3.59	2.95
Percent of preschool providers offering care at 4 or 5 star quality	38%	0%	56%	40%	29%	68%	52%	52%	41%
Percent of preschoolers enrolled in 4- or 5-star family child care homes	28%	0%	53%	46%	32%	71%	38%	48%	39%
Number of NAFCC-accredited family child care homes serving preschoolers	0	0	0	0	0	0	0	0	0
AFFORDABILITY									
Median annual income for a family with children under 18	\$49,783	\$42,659	\$54,468	\$48,031	\$57,154	\$85,776	\$50,729	\$33,032	\$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	463	34	849	136	142	303	99	199	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	\$625	no data	\$900	\$585	\$640	\$995	\$650	\$550	\$953
Cost of this type of care as a percentage of annual income for a family \$1 over eligibility for subsidy assistance	19%	no data	27%	17%	19%	30%	19%	16%	28%
<i>in Family Child Care Homes</i>									
Median monthly fee for full-time care for a 4-year-old in the most commonly used care	\$510	\$325	\$693	\$385	\$500	\$823	\$574	\$383	\$563
Cost of this type of care as a percentage of annual income for a family \$1 over eligibility for subsidy assistance	15%	10%	21%	11%	15%	25%	17%	11%	17%



School-Age Care in Region 12 (AGES 5-12)

	Alamance	Caswell	Durham	Franklin	Granville	Orange	Person	Vance	Wake
NEED									
Total number of school-age children ages 5-11	13,386	1,793	21,971	5,737	5,053	10,986	3,258	4,125	90,314
Percent of children 6 and over with all parents working	75%	74%	76%	69%	71%	73%	75%	71%	73%
Estimated number of school-age children needing child care	10,040	1,327	16,698	3,959	3,588	8,020	2,444	2,929	65,929
Rate of poverty among children 6 and over	25%	32%	24%	19%	18%	14%	17%	41%	13%
Estimated number of school-age children living in poverty	3,347	574	5,273	1,090	910	1,538	554	1,691	11,741
Rate of poverty or low-income status among children 6 and over	50%	62%	48%	50%	42%	29%	35%	68%	31%
Estimated number of school-age children in poor or low-income families	6,693	1,112	10,546	2,869	2,122	3,186	1,140	2,805	27,997
Average family size, including married-couple and single-parent families	3.02	2.99	2.98	3.03	3.26	3.02	3.09	3.29	3.18
AVAILABILITY									
<i>in Child Care Centers</i>									
Number of regulated child care centers that provide school-age care	29	1	94	19	19	30	11	4	176
Estimated capacity for school-age children in licensed child care centers	605	25	4,633	416	1,102	2,439	665	55	5,929
Type of child care center in which school-age children are most commonly enrolled	5-Star	4-Star	5-Star	3-Star	3-Star	5-Star	5-Star	4-Star	5-Star
Percent of spaces open in child care centers for new school-age enrollment in the most commonly used type of care	10%	0%	19%	5%	5%	5%	10%	40%	12%
<i>in Family Child Care Homes</i>									
Number of regulated family child care homes that provide school-age care	18	1	123	6	14	17	21	12	88
Estimated capacity for school-age children in licensed child care homes	42	3	360	16	38	41	63	35	186
Type of family child care home in which school-age children are most commonly enrolled	4-Star	1-Star	4-Star	4-Star	3-Star	5-Star	4-Star	3-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	11%	33%	8%	0%	0%	21%	22%	6%	4%
QUALITY									
<i>in Child Care Centers</i>									
Average star-rating of child care centers serving school-age children	4.22	4.00	4.81	3.75	3.27	4.69	4.19	3.50	3.53
Percent of school-age providers offering care at 4 or 5 star quality	66%	100%	80%	53%	42%	77%	64%	50%	70%
Percent of school-age children enrolled in 4- or 5-star child care centers	77%	100%	96%	48%	25%	90%	78%	78%	63%
Number of NAEYC- or NAA-accredited child care centers serving school-age children	0	0	2	0	0	0	0	0	3
<i>in Family Child Care Homes</i>									
Average star-rating of family child care homes serving school-age children	2.78	1.00	3.63	2.53	3.00	3.75	3.08	3.64	3.16
Percent of school-age providers offering care at 4 or 5 star quality	39%	0%	58%	33%	29%	71%	52%	50%	52%
Percent of school-age children enrolled in 4- or 5-star family child care homes	40%	0%	60%	40%	32%	66%	49%	52%	41%
Number of NAFCC-accredited family child care homes serving school-age children	0	0	0	0	0	0	0	0	0
AFFORDABILITY									
Median annual income for a family with children under 18	\$49,783	\$42,659	\$54,468	\$48,031	\$57,154	\$85,776	\$50,729	\$33,032	\$80,956
Annual income for a NC family of three at \$1 over eligibility for subsidy assistance	\$26,725								
Number of school-age children receiving state child care subsidies	498	22	561	99	106	219	89	198	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	\$282	\$200	\$175	\$229	\$160	\$225	\$167	\$339	\$368
Cost of this type of care as a percentage of annual income for a family \$1 over eligibility for subsidy assistance	13%	9%	8%	10%	7%	10%	7%	15%	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	\$347	\$104	\$282	\$173	\$168	\$412	\$217	\$257	\$250
Cost of this type of care as a percentage of annual income for a family \$1 over eligibility for subsidy assistance	16%	5%	13%	8%	8%	18%	10%	12%	11%

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.

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

1. *Family Support Department/Child Care Referral Central 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 the Child Care Referral Central database, operated and administered by Child Care Services Association (CCSA), 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 the Child Care Referral Central database. Enrollment in Child Care Referral Central'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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