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Washington State 2008 Child Care Survey

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EXECUTIVE SUMMARY

All 2,083 child care centers and a sample of 1,346 from the 5,482 family homes were contacted from May to July 2008 and asked to participate in the 2008 Child Care Survey funded by the Washington State Department of Early Learning. By the end of the eight-week data collection period, responses were obtained from 55% of centers and 61% of family homes, either through on-line or telephone surveys.

Findings:

- 166,480 children, or 15% of children in Washington State, were enrolled in child care. Sixty-nine percent of children attended full-time, 31% part-time. Child care centers made up 28% of licensed facilities and cared for 78% of children.

- The total capacity of Washington State's child care industry was 177,586; centers = 131,044, homes = 46,542 children. Number of vacancies at centers (13,544) and homes (14,001) were similar, but homes reported three times the vacancy rate (30% versus 10%). Fifteen percent of centers reported vacancies for infants (range: Region 4 = 9%; Region 5 = 21%).

- A total of 46,806 children, or 28% of all children in care, were subsidized by the Department of Social and Health Services. Subsidized children made up 40% of children in care at family homes and 25% of children in care at centers. Centers reported charging $3.37 more a day for non-subsidized children. The discrepancy between reimbursement and professional rates was most pronounced for Region 4.

- Child care cost $7,644 per year on average at centers and $6,938 annually at family homes. The cost of care decreases as the age of the child increases; infant care cost $10,344 at centers and $8,646 at homes per year.

- Licensed child care in Washington State supported 26,819 employees, 94% at centers. The average annual income for center staff was $19,136 for assistant teachers, $23,587 for lead teachers, $30,035 for supervisors, and $51,235 for directors. Respondents from family homes reported an average gross annual income of $36,910 (range: Region 1 = $26,428; Region 4 = $51,149). However, $43,834 was reported as the annual income among family homes whose main source of income was child care.

- The turnover rate among assistant teachers at centers was 41% and among lead teachers was 24%. Twenty-nine percent of family home providers opened for business within the last three years, 16% within the last year. One-quarter of home providers reported that they would no longer be in business within the next three years, and 7% plan to close within the year.

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CHAPTER 1
INTRODUCTION

In Washington State, the Department of Early Learning (DEL) serves as the lead agency for the Child Care Development Fund (CCDF), a federal block grant that supports:

- Child care subsidies to help low income parents pay for child care;
- Quality child care to promote each child's individual development;
- Improvements to services for infant and toddlers;
- Information and resources to parents and providers through the Child Care Resource and Referral; and
- School-age care.

CCDF lead agencies are required to conduct a market rate survey within two years of the effective date of their currently approved plan. Current market rate survey data are used to determine the rates (price) charged by child care providers and paid by families who receive child care services, within certain geographic areas. The objective in determining the market rate survey is to understand what the general population is being charged for child care services, so that adequate reimbursement rates can be set to allow subsidized families equal access to the full range of available child care. While there is no threshold set for equal access, a benchmark of the 75^{th} percentile is suggested for payment rates, allowing subsidized families access to three out of four child care providers or slots in the market.

Working Connections Child Care (WCCC) is the subsidy program that supports low income working families who make up to 200% of the federal poverty level. The DEL and the Department of Social and Health Services (DSHS) work collaboratively to administer the WCCC program. DEL is responsible for the WCCC program's policy, which includes developing and administering policy for WCCC; overseeing implementation of policies and payment authorization; writing and maintaining rules for the WCCC program; maintaining the WCCC manual; and managing the rulemaking process. DSHS is responsible for service delivery for the WCCC program, which includes determining eligibility; authorizing payment; and managing payments made to child care providers for the WCCC program.

DEL oversees expenditure of the federal CCDF block grant amount allotted to the State of Washington. These federal funds, along with some federal Temporary Assistance to Needy Family (TANF) funds as well as State Maintenance of Effort and Matching funds, comprise the funding make up of the WCCC program. The Washington State CCDF plan is developed every two years with broad community input. Due to the linkage between CCDF and the federal TANF program, these funds are a part of the TANF Box here in Washington. Spending decisions for the funds in the TANF Box, including any policy changes that have a fiscal impact, are made in conjunction with the Office of Financial Management via recommendations from the WorkFirst Cabinet on which both the Secretary of DSHS and the Director of DEL sit along with other cabinet agency directors.

In addition to collecting data required by the CCDF for establishing reimbursement rates, the DEL uses the biennial survey to request information from providers on a number of topics. This information, which is presented in this report, is extremely useful for describing the state of child care in Washington State and to assist DEL in making decisions to better serve the needs of parents and providers.

Recruitment for the Washington 2008 Child Care Survey targeted all child care centers and a simple random sample of family home providers. Centers and homes were notified of the survey by a Letter of Introduction (Appendix A) and telephone contacts, and were offered the option of participating in an on-line or telephone survey in English or Spanish. Over an eight-week period (May 19 to July 13), survey data were collected from 1,066 centers (54.5% of eligible centers) and 719 of family homes (60.5% of sampled and eligible homes). The methodology for the 2008 Child Care Survey is presented in greater detail in Appendix B.

Findings from the 2008 Child Care Survey are at times presented in this report by the six DSHS administrative regions that represent the geographical areas on which subsidy rates for child care are established. Table 1 list which counties are included in each DSHS Region.

Table 1: Washington State Counties by DSHS Region, 2008

Region					
1	2	3	4	5	6
Adams	Benton	Island	King	Kitsap	Clallam
Asotin	Columbia	San Juan		Pierce	Clark
Chelan	Franklin	Skagit			Cowlitz
Douglas	Kittitas	Snohomish			Grays Harbor
Ferry	Walla Walla	Whatcom			Jefferson
Garfield	Yakima				Klickitat
Grant					Lewis
Lincoln					Mason
Okanogan					Pacific
Pend Oreille					Skamania
Spokane					Thurston
Stevens					Wahkiakum
Whitman					

CHAPTER 2
CHILD CARE POPULATION

Licensed child care in Washington State supported 166,480 children from May to July 2008 (Table 2). Centers cared for 129,726 children and employed 25,098 staff at 2,083 licensed facilities. A total of 1,721 paid staff assisted in caring for 36,754 children at 5,482 family homes.

Table 2: Children in Care, Employees, and Licensed Child Care Facilities by Type of Facility, 2008

	Children in Licensed Care	Employees	Licensed Facilities
Centers	129,726	25,098	2,083
Family Homes	36,754	1,721	5,482
Total	166,480	26,819	7,565

Family homes outnumbered centers by a factor of 2.5. Within Region 2 there were five times as many homes as there were centers providing child care (Table 3).

Table 3: Licensed Child Care Facilities by Region, 2008

Region	Centers	Homes	Ratio Homes:Centers
1	310	889	2.9
2	192	967	5.0
3	304	992	3.3
4	627	1,253	2.0
5	325	600	1.8
6	325	781	2.4

Seventy percent (90,402/129,726) of children enrolled in centers received full-time care; 67% (24,735/36,754) of children at family homes attended on a full-time basis (Table 4). The average capacity for centers was 62.9 children and for family homes was 8.5 children; total capacity was 131,044 and 46,542 children in centers and family homes, respectively. The number of vacancies for centers and family homes combined was 27,545, with a vacancy rate for family homes (30.0%) much higher than for centers (10.3%).

Table 4: Children in Care, Capacity, Vacancies, and Vacancy Rate by Type of Facility and Full-Time Versus Part-Time Enrollment, 2008

	Children Enrolled	Average Capacity[1]	Total Capacity[1]	Number of Vacancies	Vacancy Rate[2]
Centers					
Full-Time	90,402				
Part-Time	39,324				
Total in Centers	129,726	62.9	131,044	13,544	10.3%
Family Homes					
Full-Time	24,735				
Part-Time	12,019				
Total in Family Homes	36,754	8.5	46,542	14,001	30.0%
Total in Licensed Care	166,480	23.5	177,586	27,545	15.5%

[1] For centers, licensed capacity; for family homes, licensed capacity minus providers' children in care.
[2] Vacancy rate = vacancies/capacity.

Population estimates of the number of children in full-time and part-time licensed child care by age group are presented in Table 5.

Table 5: Estimated Number of Full-Time Versus Part-Time Children Enrolled in Child Care, and Vacancies by Type of Facility and Age Group, 2008

	Full-Time Children Enrolled	Part-Time Children Enrolled	Number of Vacancies
Centers			
Infant	5,226	1,054	762
Toddler	17,443	4,469	2,193
Preschooler	39,501	15,620	4,409
Kindergartener	9,618	3,646	2,195
School-Age	18,614	14,535	3,985
Total in Centers	90,402	39,324	13,544
Family Homes			
Children Less than 2 Years	4,823	2,344	3,418
Children 2 Years or Older	19,912	9,675	10,583
Total in Family Homes	24,735	12,019	14,001
Total Licensed Care	115,137	51,343	27,545

The projected number and related proportion of children in Washington State, as available through the Office of Fiscal Management (OFM) (www.ofm.wa.gov/pop/april1/default.asp), are presented in columns (A) and (B) of Table 6. Estimates of the number and proportion of children in licensed care, as derived from the 2008 Child Care Survey, are listed columns (C) and (D). Column (E) displays the proportion of children in licensed care throughout the state. Roughly one-in-seven (14.8%) children in Washington State are estimated to be in care, with the proportions of children in care varying substantially by age group. Just under 10% of infants and school-age children were in licensed care, but about one-fourth (23.1%) of toddlers were in care. Preschoolers represented the age group with the largest number and proportion (27.5%) of the population of children in care.

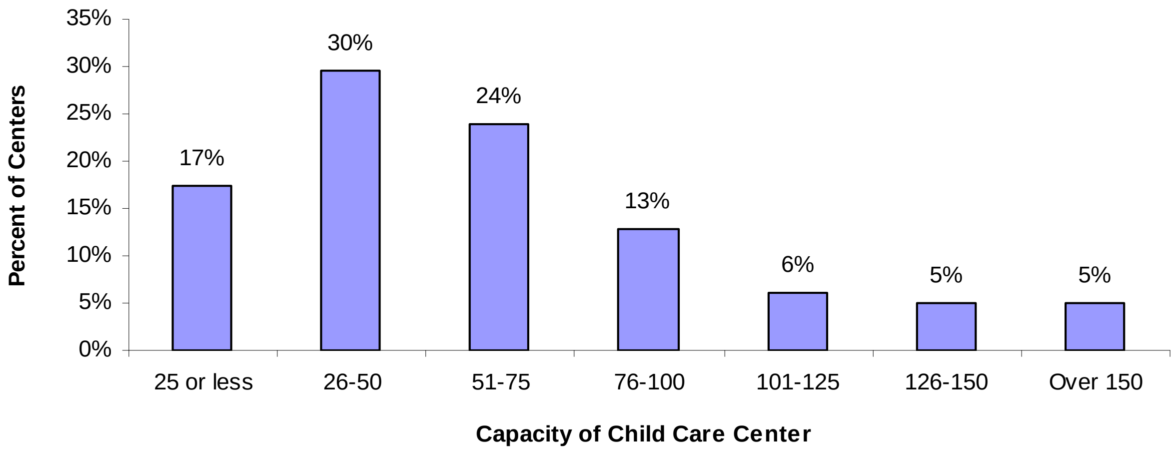
Table 6: All Children in Washington State Age < 13 Years and Children in Licensed Care by Age Group, 2008

	(A) Population Estimate < 13 Years	(B) Percent of Population < 13 Years (Column % of A)	(C) Estimated Number of Children in Licensed Care	(D) Age Group as Percent of All Children in Licensed Care (Column % of C)	(E) Percent of Age Group in Licensed Care (C / A)
Infant	89,123	7.9%	8,782	5.3%	9.9%
Toddler	131,081	11.7%	30,289	18.2%	23.1%
Preschooler	256,414	22.9%	70,541	42.4%	27.5%
School-Age	644,537	57.5%	56,868	34.1%	8.8%
Total < 13 Years	1,121,155	100%	166,480	100%	14.8%

CHAPTER 3
CHILDREN IN LICENSED CARE - CENTERS

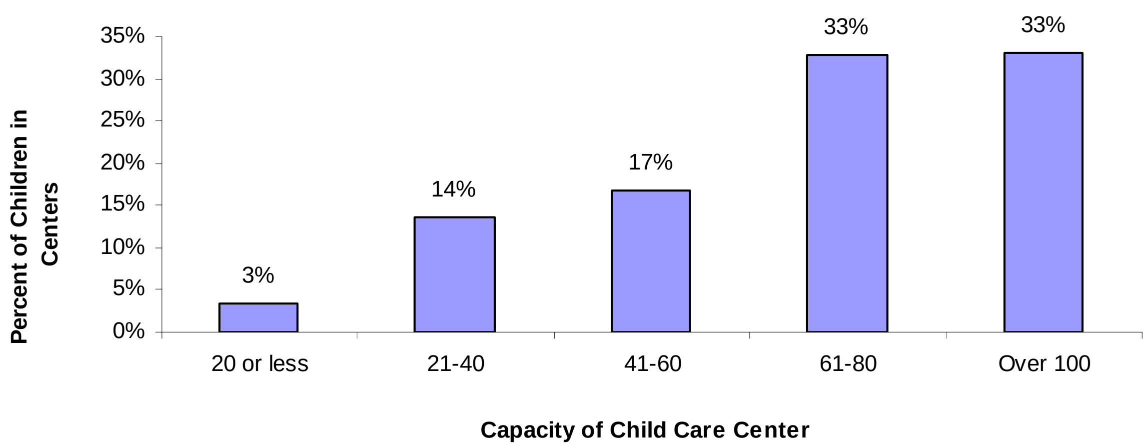
Figure 1 displays the percent of centers by levels of capacity. Thirty percent of centers reported a capacity that was subsequently categorized into the range of 26 to 50 children. A capacity of more than 100 children was reported by 16% of centers.

Figure 1: Distribution of Child Care Centers by Capacity, 2008



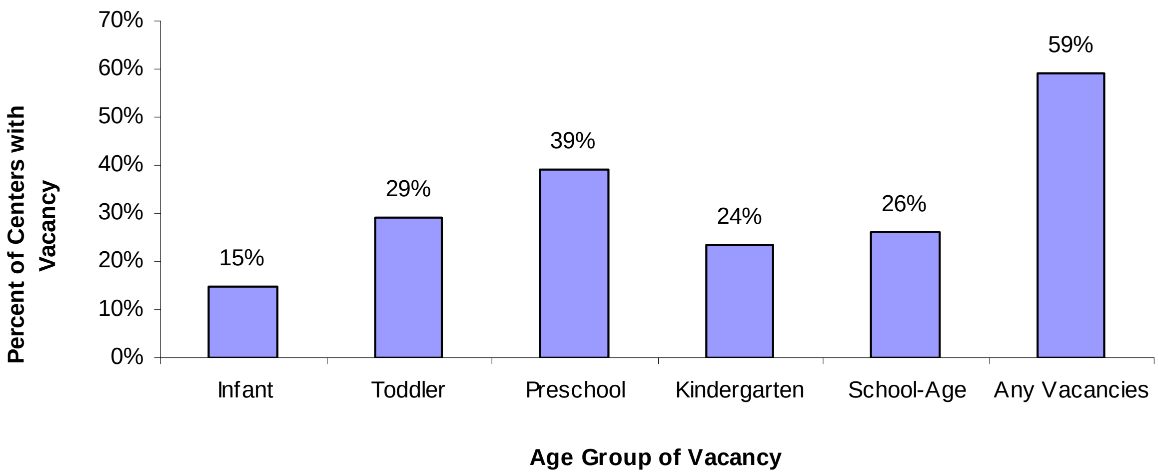
One-third of children in care at centers attended the 15% of centers with a capacity of 100 or more children (Figure 2). Only 17% of children received care at centers with capacity of 40 or fewer children.

Figure 2: Distribution of Children in Child Care Centers by Capacity, 2008



Vacancies among centers were examined by age groups (Figure 3). Vacancies for preschool children were reported by a greater proportion (39%) of centers compared with the other age groups. Only 15% of centers reported that they could enroll additional infants.

Figure 3: Percent of Centers with Vacancies by Age Group, 2008



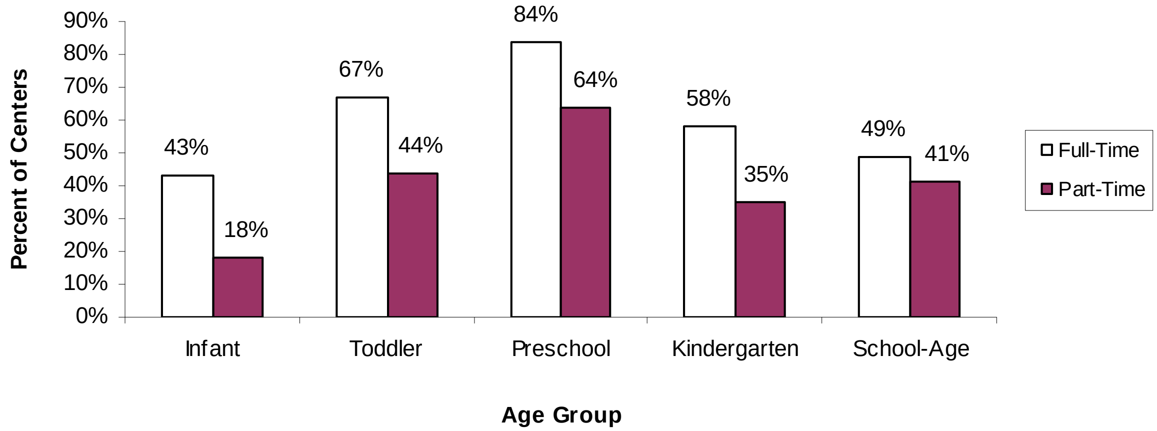
Available child care is most limited in Region 4; across all age groups fewer centers reported having at least one vacancy in Region 4 than the other regions (Table 7). For example, fewer than one-in-10 (8.7%) of centers within Region 4 reported an opening for infants. Child care vacancies were also limited in Region 2, mostly for children in kindergarten. Region 5 had the highest vacancy rate (13.6%), which is the quotient of vacancies and capacity levels.

Table 7: Percent of Centers with Vacancies by Age Group and Region, 2008

Region	Infant	Toddler	Preschool	Kindergarten	School-Age	Any Vacancies	Vacancy Rate
1	15.9%	40.2%	47.0%	26.5%	27.3%	62.9%	11.9%
2	17.1%	25.0%	30.2%	18.4%	22.4%	48.7%	11.0%
3	15.9%	36.4%	52.3%	34.1%	26.5%	72.0%	11.6%
4	8.7%	14.2%	27.6%	14.9%	20.7%	48.0%	7.1%
5	20.8%	41.7%	41.7%	26.7%	30.0%	67.2%	13.6%
6	19.5%	33.6%	44.3%	27.5%	33.6%	64.4%	11.1%
All	15.0%	29.3%	39.1%	23.5%	26.1%	59.2%	10.3%

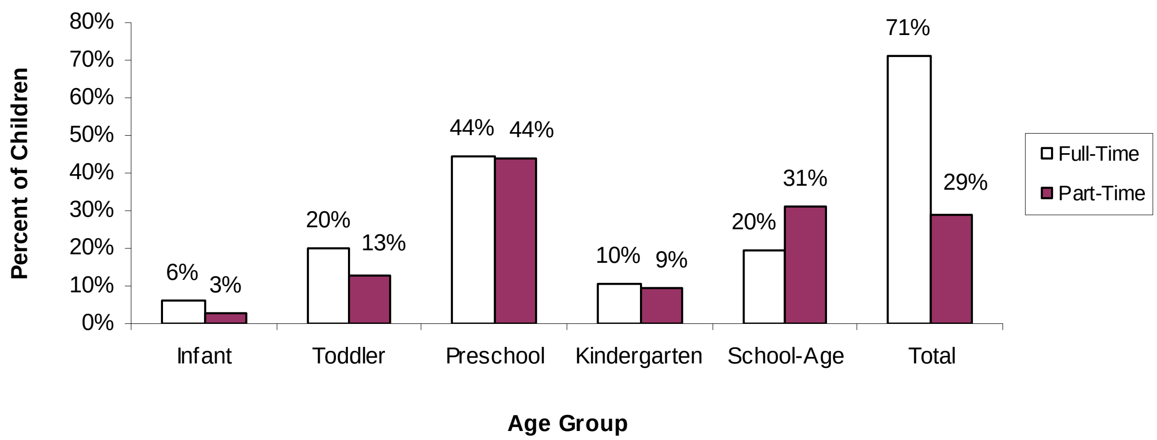
Figure 4 displays full-time and part-time care by age group. Regardless of a child's age, a smaller proportion of children are in part-time versus full-time care.

Figure 4: Centers Providing Full-Time and Part-Time Care by Age Group, 2008



While the previous figure represents the percent of centers providing full-time and part-time care, Figure 5 displays the distribution of children across age groups by full-time and part-time care. Part-time care for infants and toddlers is less prevalent than full-time care, and school-age children are more likely to be enrolled in part-time versus full-time care.

Figure 5: Distribution of Children in Centers in Full-Time and Part-Time Care by Age Group, 2008



The population of children enrolled in centers by DSHS region and age group is listed in Table 8. Region 4 had the highest number of children receiving full-time and part-time care. As we saw in Table 7, this is also the region with the lowest proportion of centers reporting child care vacancies.

Table 8: Child Care Center Population by Region and Age Group, 2008

	Region						
	1	2	3	4	5	6	All
Full-Time							
Infant	758	562	656	1,696	709	845	5,226
Toddler	2,695	1,930	2,487	5,468	2,177	2,685	17,442
Preschool	4,960	4,022	5,370	14,196	4,856	6,097	39,501
Kindergarten	1,363	648	1,700	3,082	1,240	1,585	9,618
School-Age	1,965	1,168	3,327	6,765	2,625	2,765	18,615
Total for Full-Time	11,741	8,330	13,540	31,207	11,607	13,977	90,402
Part-Time							
Infant	170	65	61	361	143	203	1,003
Toddler	695	187	703	1,362	546	760	4,253
Preschool	1,974	472	2,142	6,826	1,289	2,168	14,871
Kindergarten	659	231	569	1,205	451	355	3,470
School-Age	1,607	753	2,079	3,561	1,435	4,404	13,839
Total for Part-Time	5,105	1,708	5,554	13,315	3,864	7,890	37,436

The survey instrument requested that respondents from centers indicate whether their facilities provided care before and after school for school-age children. Centers offering summer care to school-age children were asked to provide the number of full-time and part-time children anticipated during the summer. The responses to these questions are summarized in Table 9.

Table 9: Anticipated Average Number of Full-Time and Part-Time School-Age Children Enrolled in Before and After School and Summer Care Among Centers, 2008

	Percent	Anticipated Average # of Full-Time School-Age Children	Anticipated Average # of Part-Time School-Age Children
Provide Before and After School Child Care for School-Age Children	59.9%	--	--
Provide Summer Child Care for School-Age Children	59.2%	12.8	3.2

CHAPTER 4
CHILDREN IN LICENSED CARE – FAMILY HOMES

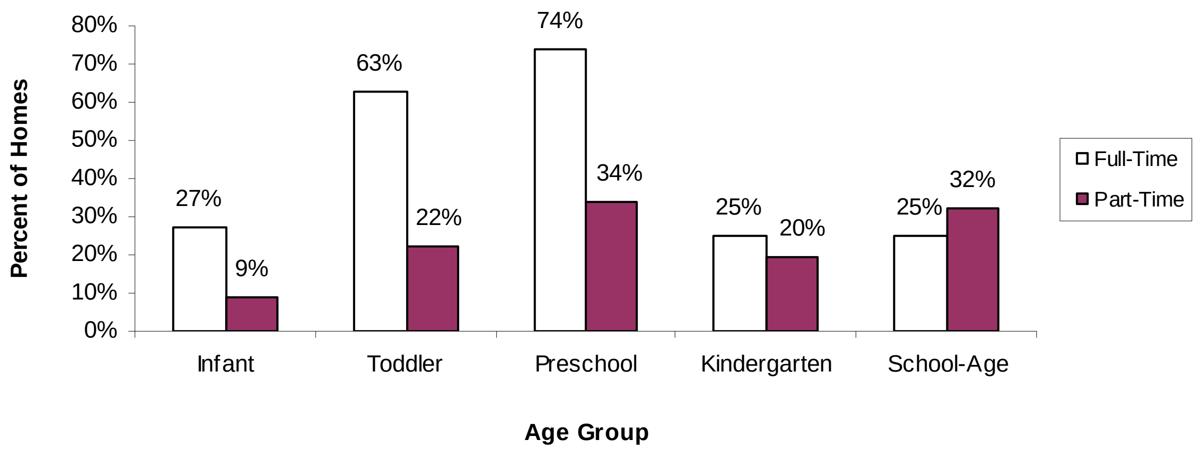
The proportion of family homes with at least one vacancy (61.2%; Table 10) is similar to the proportion calculated for centers (59.2%; Table 7). Parents from Regions 1 though 5 would find available child care for children less than two years in at least one-in-five homes; nearly half (46.6%) of homes in Region 2 reported openings for young children. The lowest proportion of vacancies for children under two years was found for Region 6.

Table 10: Family Homes with Vacancies by Region, 2008

Region	Children Less than 2 Years	Any Vacancies
1	38.1%	60.3%
2	46.6%	71.6%
3	28.1%	60.9%
4	32.0%	58.2%
5	20.8%	57.0%
6	17.8%	56.9%
All	31.9%	61.2%

Figure 6 compares the proportion of children receiving full-time and part-time care by age group. Similar to child care centers (Figure 4), the highest proportion of full-time and part-time care is found for preschoolers. Less than one-in-10 homes provided part-time care to infants.

Figure 6: Family Homes Providing Full-Time and Part-Time Care by Age Group, 2008



The distribution of children in homes by full-time or part-time care across age groups appears in Figure 7. Preschoolers accounted for the highest proportion of full-time attendance; whereas part-time infants had the lowest at 2%. Home care providers reported that twice as many children were enrolled full-time (68%) than part-time (32%).

Figure 7: Distribution of Children in Homes in Full-Time or Part-Time Care, 2008

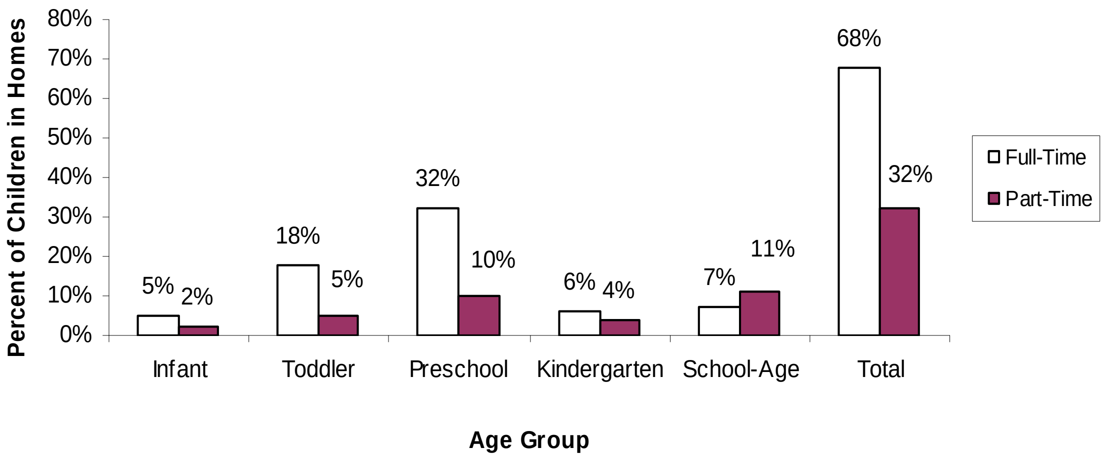
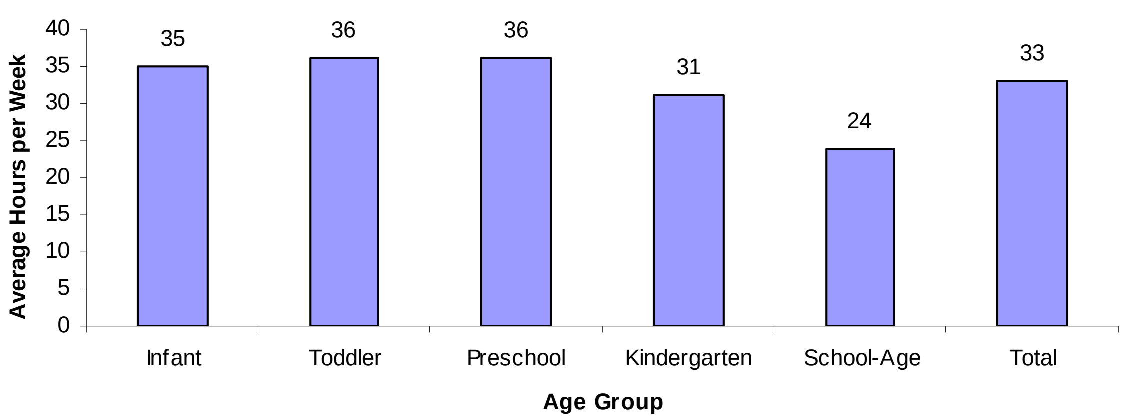


Figure 8 shows the average hours per week that children within each age group spent in licensed family home care. On average, children received care in family homes for at least 30 hours a week, except for school-age children.

Figure 8: Average Hours per Week in Family Home Care by Age Group, 2008



Estimates of the total number of children receiving full-time and part-time care within the six DSHS regions is presented in Table 11. Family homes within Regions 2 and 4, compared with the other regions, cared for the most full-time and part-time children, respectively.

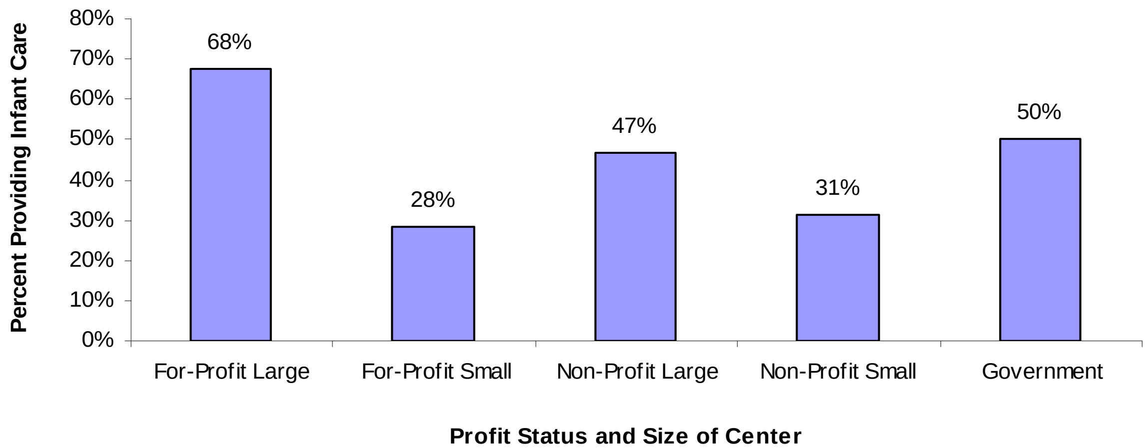
Table 11: Family Home Population by Region and Age Group, 2008

	Region						
	1	2	3	4	5	6	All
Full-Time							
Infant	361	392	313	400	220	165	1,851
Toddler	1,074	1,325	1,106	1,349	792	848	6,494
Preschool	2,298	1,976	1,937	2,188	1,255	1,976	11,630
Kindergarten	369	494	322	337	235	415	2,172
School-Age	478	620	408	322	431	329	2,588
Total for Full-Time	4,580	4,807	4,086	4,596	2,933	3,733	24,735
Part-Time							
Infant	102	62	150	204	32	102	652
Toddler	172	251	314	642	173	329	1,881
Preschool	314	423	550	1330	378	798	3,793
Kindergarten	313	251	283	258	142	274	1,521
School-Age	517	588	770	618	646	1033	4,172
Total for Part-Time	1,418	1,575	2,067	3,052	1,371	2,536	12,019

CHAPTER 5
PROFIT STATUS AND INFANT AND SCHOOL-AGE CARE AMONG CENTERS

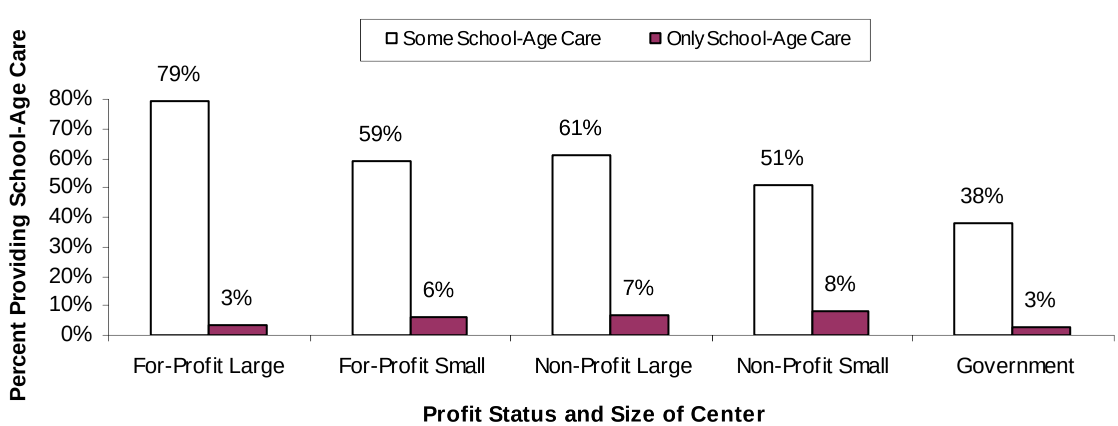
Figure 9 displays the proportion of centers, categorized by their size and profit status, reporting infant care. Providers selected the profit status that best described their facility from the following categories: Profit, non-profit, or government operated. A smaller proportion of small centers (capacity less than 60 children) provided infant care; with profit status seemingly unrelated to infant care. Large centers were more likely to report infant care than small centers, with a greater proportion of for-profit centers caring for infants than non-profit centers. Infant care occurred at half of centers associated with the government.

Figure 9: Child Care Centers' Profit Status and Infant Care, 2008



Large, for-profit centers were more likely to offer some school-age care than other types of centers. Only 38% of government centers care for some school-age children (Figure 10).

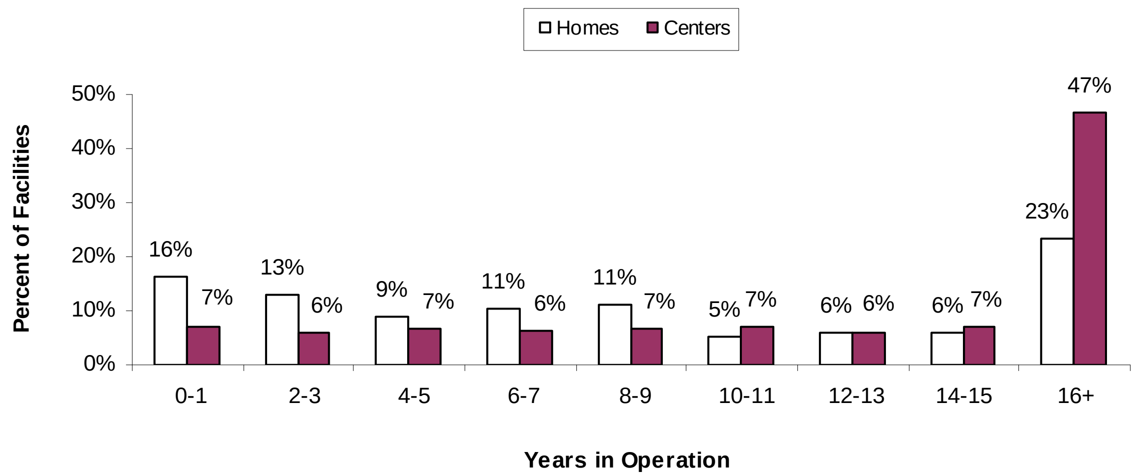
Figure 10: Child Care Centers' Profit Status and School-Age Care, 2008



CHAPTER 6
PROVIDER BUSINESS TRAITS

Centers reported a greater number of years in operation than did family homes. In fact, 47% of centers had been in business at least 16 years, while only 23% of homes had operated for 16 or more years (Figure 11). Conversely, 7% of centers and 16% of family homes had provided care for fewer than two years.

Figure 11: Years in Business: Family Homes and Centers, 2008



Seven percent of respondents from family homes stated that their facility would not be in business next year (Figure 12). This equates to 383 family homes out of business within the year. One-fourth of family home providers anticipated no longer being in the child care business within three years.

Figure 12: Years Plan to Operate Child Care at Home, 2008

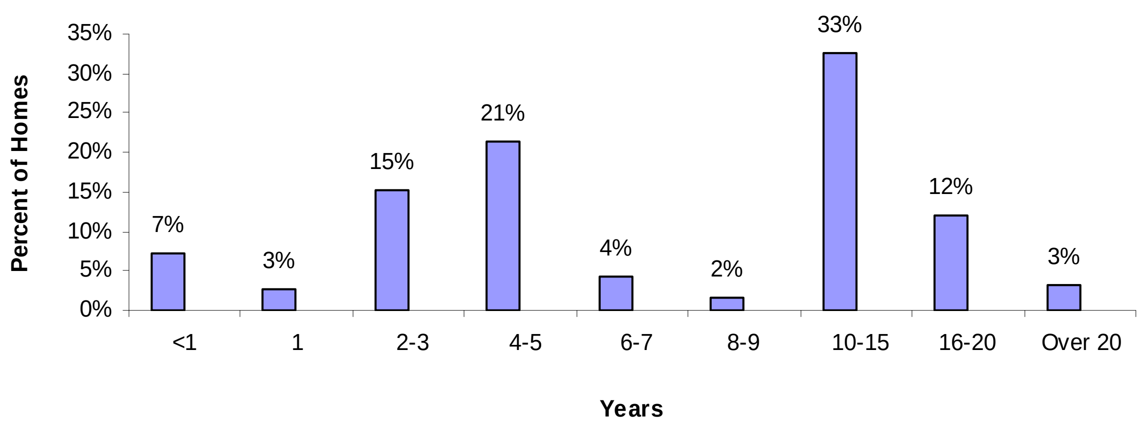


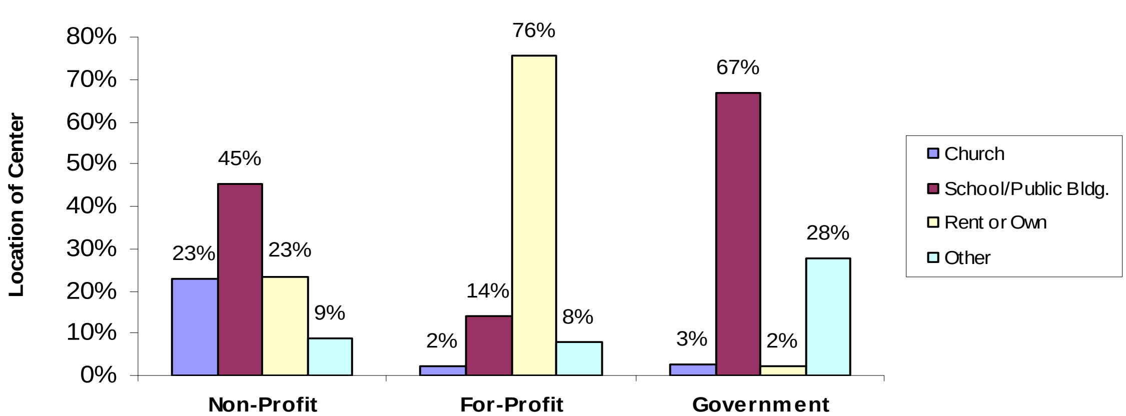
Table 12 shows the characteristics of child care centers. Just under half (44.3%) of centers were located in rented or owned facilities. Over half (55.2%) operated as non-profit organizations. Internet access was available at 81.4% of centers.

Table 12: Characteristics of Child Care Centers, 2008

	n	Percent
Location		
School	295	28.4%
Other Public Building	50	4.8%
Church	137	13.2%
Employer Provided Facility	52	5.0%
Rented or Owned Site	459	44.3%
Someplace Else	45	4.3%
Type of Center		
Non-Profit	573	55.2%
For-Profit	429	41.3%
Government	36	3.5%
University or College Based	79	7.6%
Head Start, Early Head Start, Kindergarten or ECEAP Program	272	26.2%
Access to Internet On-Site	845	81.4%

Most non-profit and government centers were located within a school or public building (Figure 13). Seventy-six percent of for-profit centers were in a rented or owned facility.

Figure 13: Type of Center and Physical Location, 2008



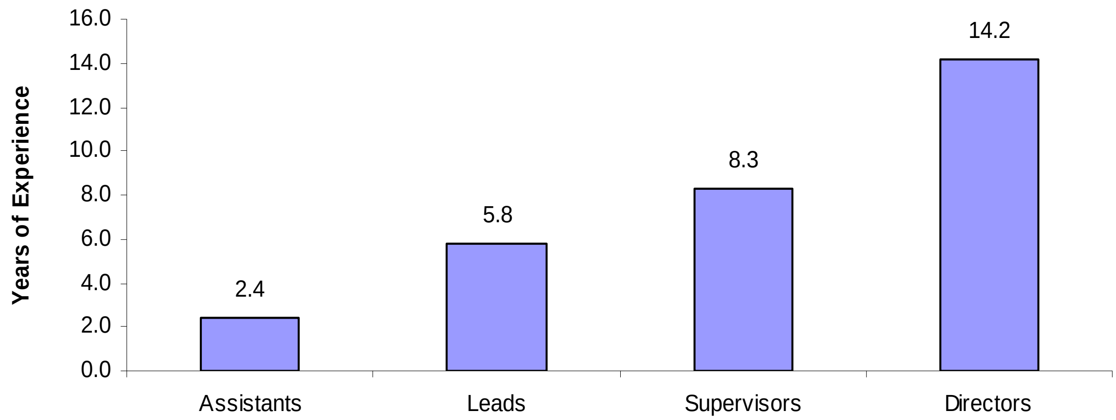
Survey respondents from centers reported the number of years the business was operated under its current ownership. The average of these responses was 14.2 years (Table 13). Sixty-seven percent of centers reported having no volunteers. Centers averaged 1.3 volunteers; the average number of volunteers was four when considering only those centers with at least one volunteer. There was an average of 14.5 paid staff (assistant teachers, lead teachers, supervisors, and directors) per center.

Table 13: Average Years Ownership, and Number of Volunteer and Paid Staff Among Centers, 2008

	Average
Years Under Current Ownership	14.2
Number of Volunteers	1.3
Number of Paid Staff	14.5

Figure 14 presents the average number of years of experience among paid staff at centers. As expected, assistant teachers had the least amount of experience, averaging 2.4 years; while directors had the most paid experience at 14.2 years.

Figure 14: Average Number of Years of Paid Child Care Experience for Center Staff, 2008



The percent of staff in the roles of supervisor or director were quite similar in for-profit, non-profit, and government centers (range = 13.4% to 16.1%; Table 14). However, government-affiliated centers were much more dependent on assistant teachers than were for-profit and non-profit centers. Over half (55.9%) of government centers also reported using volunteers to assist in the care of children.

Table 14: Staff Composition by Type of Center, 2008

	Percent of Paid Staff				
	Assistants	Leads	Supervisors and Directors	Uses Volunteers	Average Number of Volunteers
For-Profit	32.2%	54.4%	13.4%	21.8%	2.6
Non-Profit	39.0%	44.9%	16.1%	40.6%	4.5
Government	59.6%	26.2%	14.2%	55.9%	5.2
All Centers	36.7%	48.6%	14.7%	32.8%	4.0

The average monthly and annual income of center staff is presented in Table 15. These data were derived from survey items that requested the hourly rates for assistant teachers, lead teachers and supervisors, and monthly salary for directors. Average hourly rates were $9.20 for assistant teachers, $11.34 for lead teachers, and $14.44 for supervisors. Median income (the value in the middle of the range of reported incomes) for center staff is also provided. Similarities between median and average values indicate that income levels distribute evenly around the average. Higher average income (compared with the median) within a staff classification denotes that some staff, such as directors, were paid at levels much higher than other directors. Table 15 also shows that on average there were 10 children per lead teacher and 12 children per assistant teacher. Over four-in-10 assistant teachers had been employed less than a year. In addition, nearly one quarter (23.9%) of lead teachers at centers were hired after September 1, 2007.

Table 15: Median and Average Income, Children per Staff, and Turnover by Type of Staff Among Child Care Centers, 2008

	Median Monthly Income[1]	Average Monthly Income[1]	Median Annual Income[2]	Average Annual Income[2]	Average Children Per Staff	Hired After September 1, 2007
Assistants	$1,560	$1,595	$18,720	$19,136	12.1	41.3%
Leads	$1,733	$1,966	$20,800	$23,587	10.2	23.9%
Supervisors	$2,253	$2,503	$27,040	$30,035	55.9	17.3%
Directors[3]	$2,600	$4,270	$31,200	$51,235	64.1	11.3%

[1] Monthly income based on reported average hourly rate x 173.33 for assistant teachers, lead teachers, and supervisors.
[2] Annual income based on reported average hourly rate x 2080 for assistant teachers, lead teachers, and supervisors.
[3] Directors' annual income = average monthly income x 12.

The percent of recently hired (versus employed before September 1, 2007) assistant teachers, lead teachers, supervisors, and directors across the six DSHS regions is seen in Table 16. These percents were calculated with data from centers that had been in operation for at least one year. Staff turnover is relatively consistent across regions with two notable exceptions: Over half of assistant teachers in Region 5 were hired within the year and 40.3% of supervisors working at centers in Region 2 were new hires.

Table 16: Percent of Staff Newly Hired by Region, 2008

Region	Assistants	Leads	Supervisors	Directors
1	41.8%	20.7%	8.2%	12.4%
2	39.6%	30.3%	40.3%	12.3%
3	46.9%	30.5%	19.4%	10.1%
4	35.8%	20.2%	15.3%	10.1%
5	51.4%	26.5%	22.0%	13.1%
6	46.5%	27.8%	18.3%	11.4%
All	41.3%	23.9%	17.3%	11.3%

Table 17 displays the median and average monthly income for center staff by region. Region 4 reported the highest income for all staff.

Table 17: Median and Average Monthly Income of Child Care Center Staff by Region, 2008

	Assistants		Leads		Supervisors		Directors	
Region	Median Monthly Income	Average Monthly Income	Median Monthly Income	Average Monthly Income	Median Monthly Income	Average Monthly Income	Median Monthly Income	Average Monthly Income
1	$1,387	$1,479	$1,473	$1,804	$2,080	$2,243	$2,200	$3,893
2	$1,387	$1,447	$1,560	$1,699	$2,080	$2,187	$2,250	$4,692
3	$1,560	$1,565	$1,733	$1,863	$2,253	$2,442	$2,500	$3,935
4	$1,733	$1,768	$2,080	$2,257	$2,600	$2,886	$3,160	$4,962
5	$1,560	$1,569	$1,733	$1,855	$2,080	$2,210	$2,500	$3,907
6	$1,387	$1,529	$1,733	$1,877	$2,253	$2,456	$2,600	$3,814
All	$1,560	$1,685	$1,733	$1,877	$2,253	$2,498	$2,600	$4,270

Table 18 further breaks down levels of income by type of center. Directors employed through government centers had higher levels of income than directors from non-profit and for-profit centers.

Table 18: Median and Average Monthly and Annual Income in Child Care Centers by Center Type, 2008

	Median Monthly Income	Average Monthly Income	Median Annual Income	Average Annual Income
Government Center				
Assistants	$1,733	$1,768	$20,800	$21,216
Leads	$2,253	$2,456	$27,040	$29,474
Supervisors	$2,773	$3,409	$33,280	$40,914
Directors	$3,500	$5,198	$42,000	$62,376
Non-Profit Center				
Assistants	$1,560	$1,603	$18,720	$19,240
Leads	$1,907	$2,973	$22,880	$35,672
Supervisors	$2,427	$3,650	$29,120	$43,805
Directors	$2,600	$4,312	$31,200	$51,744
For-Profit Center				
Assistants	$1,560	$2,049	$18,720	$24,586
Leads	$1,733	$2,323	$20,800	$27,872
Supervisors	$2,167	$2,340	$26,000	$28,080
Directors	$2,600	$4,127	$31,200	$49,524

Questions related to benefits were restricted to lead teachers in the survey instrument. Approximately two-thirds (65.2%) and three-fourths (74.8%) of centers offered paid sick leave and vacation benefits, respectively, to lead teachers (Table 19). Medical insurance was available to lead teachers at just over half (56.7%) of centers.

Table 19: Lead Teacher Benefits in Child Care Centers, 2008

	Percent
Paid Sick Leave	65.2%
Paid Vacation	74.8%
Medical Insurance	56.7%

A greater percentage of centers from Region 4 offer lead teachers benefits compared with centers located in other regions (Table 20). Lead teachers considering employment at centers within Region 2 would be less likely obtain benefits than lead teachers looking for work at centers outside of Region 2.

Table 20: Centers Providing Benefits to Lead Teachers by Benefit Type and Region, 2008

Region	Paid Sick Leave	Paid Vacation	Medical Insurance
1	56.1%	66.7%	44.0%
2	44.7%	55.3%	34.2%
3	69.7%	75.8%	51.5%
4	79.7%	84.0%	73.5%
5	54.2%	73.3%	42.5%
6	62.4%	75.2%	64.4%
All	65.2%	74.8%	56.7%

Table 21 displays the characteristics of family home providers. In 2008, 61.2% of homes received assistance from the USDA Food Program. Just over half (54.1%) of respondents from homes reported having liability insurance, and 52.3% said that child care provided the main source of income for their household. Internet access at homes was at a rate similar to that found for centers (80.8% versus 81.4%; Table 12).

Table 21: Characteristics of Family Home Providers, 2008

	Percent
Receive Assistance from the USDA Food Program	61.2%
Covered by Liability Insurance	54.1%
Child Care Earnings Main Source of Income	52.3%
Access to Internet On Site	80.8%

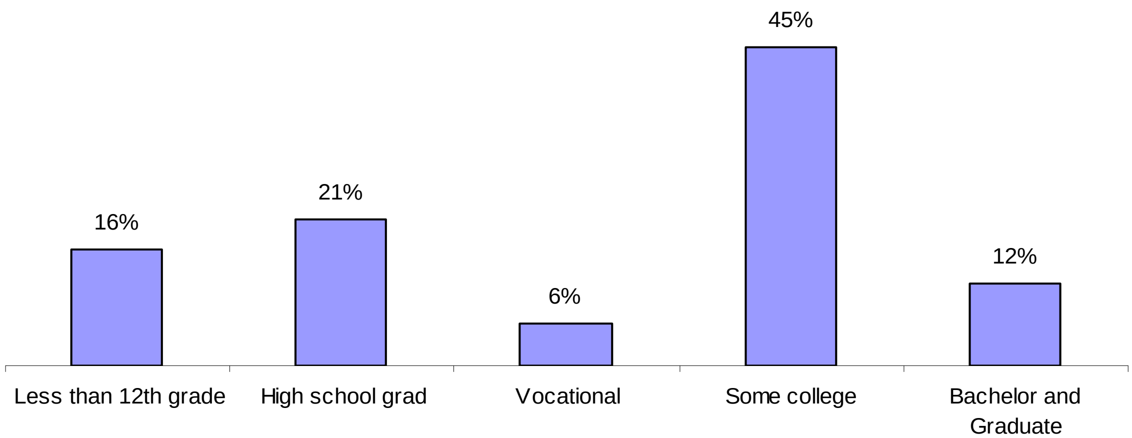
Two-thirds (67.3%) of family home providers indicated that they have medical insurance (Table 22). When asked about levels of education, 15.5% reported having an associate degree in Child Development or a CDA; only 4.0% had a bachelor or graduate degree in Early Childhood Development. A little more than a quarter (27.7%) were Latino or Hispanic. The racial break down of the respondents is also provided in Table 22.

Table 22: Characteristics of Owners of Family Homes, 2008

	n	Percent
Have Medical Insurance	474	67.3%
Have Associate Degree in Child Development or a CDA	109	15.5%
Have Bachelor or Graduate Degree in Early Childhood Development	28	4.0%
Latino or Hispanic	195	27.7%
Racial Group		
White	418	59.4%
African American / Black	30	4.3%
Asian	25	3.6%
American Indian or Alaskan Native	16	2.3%
Hawaiian or Pacific Islander	5	0.7%
Other	170	24.1%
Refused to Answer	40	5.6%

In Table 22 we saw that 4.0% of respondents had a bachelor or graduate degree in Early Childhood Development. Overall, 12.0% of these providers had at least a bachelor degree (Figure 15). Sixteen percent of respondents from family homes reported less than a high school education.

Figure 15: Family Home Providers' Highest Level of Education, 2008



On average, licensed family home providers' gross income was $36,910 (Table 23). Income was lowest for homes in Region 1 and highest for homes in Region 4.

Table 23: Median and Average Gross Annual Earnings of Family Home Providers by Region, 2008

Region	Median Annual Earnings	Average Annual Earnings
1	$23,900	$26,428
2	$26,000	$29,784
3	$35,000	$42,653
4	$39,000	$51,149
5	$30,000	$35,147
6	$25,000	$31,937
All	$30,000	$36,910

A positive relationship was found between the length of time that homes were in business and income (Table 24). The 52.3% of family home providers who reported that child care was their main source of income (Table 21) had higher income from their child care business than providers with other sources of income.

Table 24: Median and Average Earnings of Family Home Providers Overall and by Years in Business and Child Care as Main Source of Income, 2008

	Median Annual Earnings	Average Annual Earnings
Overall	$30,000	$36,910
Years in Business		
0 to 3	$15,000	$21,275
4 to 6	$30,000	$41,768
7+	$35,000	$42,670
Child Care Main Source of Income		
Yes	$35,000	$43,834
No	$24,000	$28,521

Individuals seeking early morning child care would find about six-in-10 centers and half of homes opening before 7 AM (Table 25). Family homes are more likely to close before 6 PM, but a greater proportion of homes versus centers stayed open past 7 PM. Family homes are also more likely to operate 24 hours and on weekends.

Table 25: Child Care Availability by Type of Facility, 2008

	Child Care Centers	Family Home Providers
Mornings		
Before 6 AM	9.5%	16.3%
6 to 7 AM	51.0%	33.7%
Evenings		
6 to 7 PM	64.0%	26.6%
7 to 8 PM	1.9%	3.0%
Later Than 9 PM	1.1%	5.8%
Open 24 Hours	0.1%	8.7%
Weekends		
Saturday	7.8%	28.8%
Sunday	6.6%	18.9%

CHAPTER 7
CHILD CARE PRICES

Table 26 presents the standard monthly and annual cost of full-time child care for centers and homes by age group. Infant care is most expensive, with rates decreasing as children's age increases. Depending on the age of the child and whether care occurs at a center or home, child care in Washington State can cost a family from $5,391 to $10,344 a year.

Table 26: Average Rate per Month and Annual Cost for Full-Time Child Care by Type of Facility and Age Group, 2008

	Average Rate per Month[1]	Annual Cost of Child Care
Child Care Centers		
Infant	$862	$10,344
Toddler	$726	$8,712
Preschooler	$640	$7,680
Kindergartener	$529	$6,348
School-Age	$451	$5,412
All Ages	$637	$7,644
Family Home Providers [2]		
Infant	$721	$8,646
Toddler	$626	$7,515
Preschooler	$590	$7,076
Kindergartener	$525	$6,304
School-Age	$449	$5,391
All Ages	$578	$6,938

[1] Standard, non-subsidized rate.
[2] Annual = Weekly Rate X 52; Monthly Rate = Annual / 12.

CHAPTER 8
STATE SUBSIDIZED CHILDREN

Family home providers cared for subsidized children at a rate lower than centers, 65.2% versus 81.5% (Table 27). The estimated number of subsidized children across the state was 14,546 in family homes and 32,260 in centers. Nearly four-in-10 (39.6%) children in family homes were subsidized and one-quarter (24.9%) of children in centers were subsidized. Family homes survey participants reported an average of 2.7 subsidized children, and centers were found to care for an average of 15.5 subsidized children, over the last typical week of operation. Over 80% (1,404/1,691) of centers with subsidized children did not set limits on how many subsidized children they accepted. Overall, 67.7% of centers accepted subsidized children and did not place limits on the number they accepted. A total of 28,783 subsidized children received care in centers without such restrictions, representing 22.2% of the 129,726 children in care at centers.

Table 27: Subsidized Children by Type of Facility, 2008

		Child Care Centers		
	Family Home Providers	Overall	Sets Limits on # of Subsidized Children	Does Not Set Limit on # of Subsidized Children
Number of Facilities with Subsidized Children	3,574	1,697	288	1,409
As Percent of All Facilities	65.2%	81.5%	13.8%	67.7%
Total Number of Subsidized Children	14,546	32,260	3,477	28,783
As Percent of All Children	39.6%	24.9%	2.7%	22.2%
Average # of Subsidized Children, Last Typical Week	2.7	15.5	1.7	13.8

In the previous table we saw that 65.2% of homes and 80.7% of centers reported caring for subsidized children. Figure 16 shows the distribution of the proportions of facilities with subsidized children across the six DSHS regions. Regions 3 and 5 had the highest proportions of centers serving subsidized children. Region 5 had the largest disparity between homes and centers providing subsidized care. Region 4 had the lowest proportions of facilities serving subsidized children.

Figure 16: Facilities Serving Subsidized Children by Region, 2008

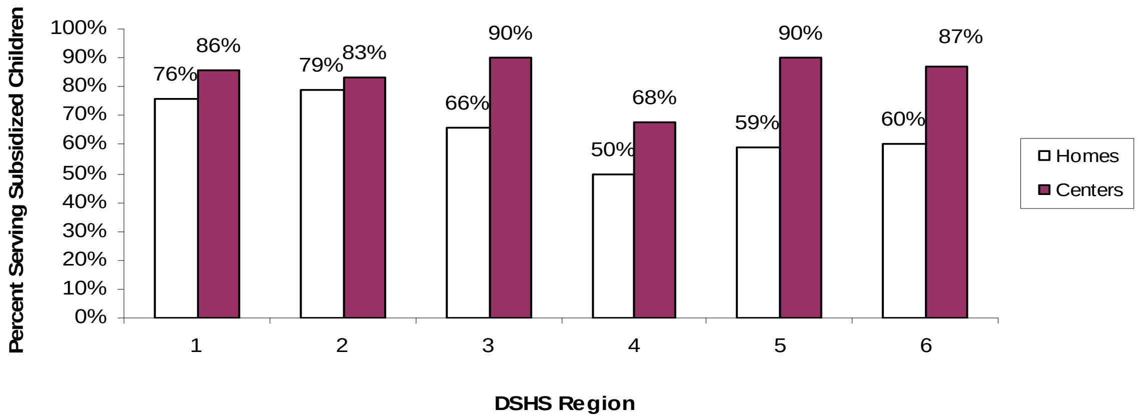
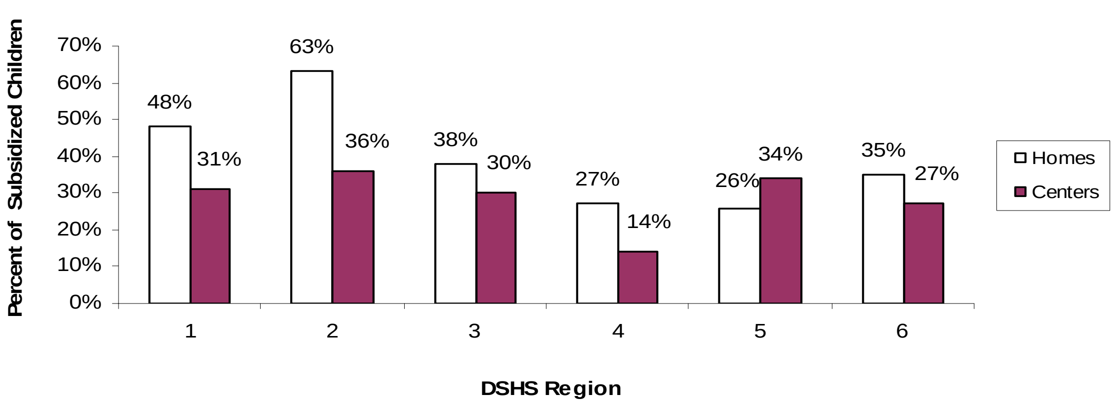


Figure 17 displays the proportion of subsidized children within homes and centers by region. Region 2 has the highest proportion of subsidized children in both family homes (63%) and centers (36%). Homes had a higher proportion of subsidized children than centers, except for Region 5. Region 4 had the lowest proportions of subsidized children compared with the other regions.

Figure 17: Subsidized Children as Percent of All Children in Licensed Facilities by Region, 2008



Practices related to subsidized children by centers are presented in Table 28. The proportion of centers serving subsidized children (from Figure 16) is provided alongside the proportion of centers *willing* to serve subsidized children. As seen in the table, the majority of centers across the six regions were not averse to caring for subsidized children; however, a full one-fourth of centers from Region 4 did not currently and were not willing to serve subsidized children. Moreover, among centers in Region 4 that do serve subsidized children, 23.0% placed limits on the number of subsidized children they will enroll. The last column in Table 28 shows that centers limiting enrollment accepted at least 10 subsidized children; caps on enrollment were highest among centers in Regions 1 and 6.

Table 28: Centers Limiting Enrollment of Subsidized Children by Region, 2008

Region	Number of Centers	Percent Serving Subsidized Children	Percent Willing to Serve Subsidized Children	Percent Limiting Subsidized Children	Average Limit on Subsidized Children
1	310	85.6%	90.9%	11.5%	22
2	192	82.9%	89.5%	9.5%	13
3	304	90.1%	94.7%	18.5%	18
4	627	68.0%	75.3%	23.0%	11
5	325	90.0%	94.2%	16.7%	12
6	325	87.2%	89.3%	15.5%	24
All	2,083	81.4%	86.7%	17.0%	16

Table 29 compares average monthly rates for full-time preschoolers among centers serving and not serving subsidized children. Rates for full-time preschoolers were substantially higher among centers serving subsidized children in Regions 1 and 2. However, rates in Region 4 were higher for centers not providing care to subsidized children.

Table 29: Full-Time Rates for Preschool Children, Differences Between Centers Serving and Not Serving Subsidized Children by Region, 2008

Region	Serving Subsidized Children	Not Serving Subsidized Children	Percent Difference
1	$509	$361	(29%)
2	$448	$351	(22%)
3	$605	$652	8%
4	$776	$950	22%
5	$591	$574	(3%)
6	$524	$523	(<1%)
All	$600	$743	24%

Non-subsidized monthly and weekly rates were converted to daily rates for comparisons with the rates that DSHS reimburses centers and homes in each of the six regions. Along with the DSHS rates, Tables 30 and 31 show the 75th percentile rate; 75% of providers were found to charge for care at or below the 75th percentile. Three out of four centers in Region 1, for example, charged a daily rate for infant care of $33.08 <u>or less</u> (Table 30). Survey data were also used to estimate the proportion of children who received care at or below the DSHS Rate. Using the same example, the daily rate for infant care in Region 1 was $28.53 or less at 35% of centers.

Table 30: Center DSHS Rates Versus 75th Percentile Rate per Day1 and Percent of Facilities At or Below DSHS Rate for Full-Time Children by Age Group and Region, 2008

	Infant			Toddler			Preschool			School-Age		
Region	DSHS Rate	75th Per-centile[2]	% At/Below DSHS Rate[3]	DSHS Rate	75th Per-centile[2]	% At/Below DSHS Rate[3]	DSHS Rate	75th Per-centile[2]	% At/Below DSHS Rate[3]	DSHS Rate	75th Per-centile[2]	% At/Below DSHS Rate[3]
1	$28.53	$33.08	35%	$23.99	$28.20	34%	$22.67	$26.88	25%	$21.34	$25.00	51%
2	$28.81	$31.82	48%	$24.06	$29.32	45%	$22.30	$26.68	44%	$19.73	$22.73	58%
3	$38.13	$45.00	39%	$31.79	$37.67	34%	$27.46	$33.25	38%	$26.67	$29.77	60%
4	$44.38	$63.07	17%	$37.06	$53.64	18%	$31.09	$44.77	15%	$28.00	$34.16	58%
5	$32.54	$39.09	33%	$28.00	$34.09	31%	$24.65	$30.68	30%	$21.88	$25.49	52%
6	$31.99	$38.27	42%	$27.46	$34.09	38%	$23.99	$28.90	37%	$23.46	$27.34	59%
Spokane	$29.18	$34.27	46%	$24.54	$28.84	33%	$23.19	$26.36	41%	$21.83	$23.64	57%

[1] Daily Rate = Monthly / 22.
[2] Seventy-five percent of providers charge for care at or below given price.
[3] Percent of providers charging for care at or below DSHS rate.

Table 31: Family Home DSHS Rates Versus 75th Percentile Rate per Day1 and Percent of Facilities At or Below DSHS Rate for Full-Time Children by Age Group and Region, 2008

	Infant			Toddler			Preschool			School-Age		
Region	DSHS Rate	75th Per-centile[2]	% At/Below DSHS Rate[3]	DSHS Rate	75th Per-centile[2]	% At/Below DSHS Rate[3]	DSHS Rate	75th Per-centile[2]	% At/Below DSHS Rate[3]	DSHS Rate	75th Per-centile[2]	% At/Below DSHS Rate[3]
1	$24.29	$25.00	53%	$21.12	$25.00	31%	$21.12	$22.00	60%	$18.78	$20.00	56%
2	$25.65	$25.00	82%	$22.30	$27.40	31%	$19.95	$26.00	36%	$19.95	$24.20	45%
3	$34.03	$35.75	63%	$29.33	$32.00	43%	$25.81	$32.00	36%	$23.46	$27.00	25%
4	$40.04	$46.00	56%	$34.81	$40.00	48%	$29.33	$36.00	32%	$28.16	$30.50	47%
5	$26.99	$30.00	35%	$23.46	$30.00	30%	$22.30	$28.30	38%	$19.95	$23.00	57%
6	$26.99	$30.00	44%	$23.46	$28.40	28%	$23.46	$26.00	51%	$22.30	$23.75	70%
Spokane	$24.84	Too few cases (<5)		$21.60	$25.00	40%	$21.60	$28.00	28%	$19.21	$21.00	48%

[1] Daily Rate = Weekly / 5.
[2] Seventy-five percent of providers charge for care at or below given price.
[3] Percent of providers charging for care at or below DSHS rate.

Survey participants from centers not currently caring for subsidized children were presented with the four statements listed in Table 32 and asked to indicate whether they agreed or disagreed with each statement. Almost half (49.4%) agreed that DSHS does not pay their full rate. About one-in-seven (14.9%) participants are under impression that subsidized children require extra work, 25.3% stated that they don't understand DSHS billing rules, and 18.4% said they "don't like to deal with DSHS."

Table 32: Beliefs and Attitudes About Subsidized Child Care Among Child Care Centers Not Currently Providing Subsidized Care, 2008

	Agree	Disagree
DSHS does not pay my full rate	49.4%	50.6%
Subsidized children require extra work	14.9%	85.1%
I don't understand DSHS billing rules	25.3%	74.7%
I don't like to deal with DSHS	18.4%	81.6%

Table 33 displays the racial/ethnic characteristics of survey respondents from family home providers. Just over one-fourth (25.6%) of family homes reported Hispanic ethnicity, and 90.0% of family homes owned by Hispanics serve subsidized children. A total of 6,424 subsidized children received care at Hispanic-owned family homes, representing 44.2% (6,424/14,546) of all subsidized children in the state.

Table 33: Family Home Providers Serving Subsidized Children by Ethnicity of Provider, 2008

	# of Providers	Percent of Providers	Percent Serving Subsidized Children	# of Subsidized Children Served	Percent of Subsidized Children
White	3,161	57.7%	55.4%	6,121	25.9%
Hispanic	1,402	25.6%	90.0%	6,424	77.9%
Asian	179	3.3%	43.5%	265	25.9%
Black	210	3.8%	74.1%	568	46.7%
Native American	125	2.3%	75.0%	444	45.9%
Other or Unknown	405	7.4%	57.7%	724	43.5%
State Total	5,482	100%	65.2%	14,546	39.6%

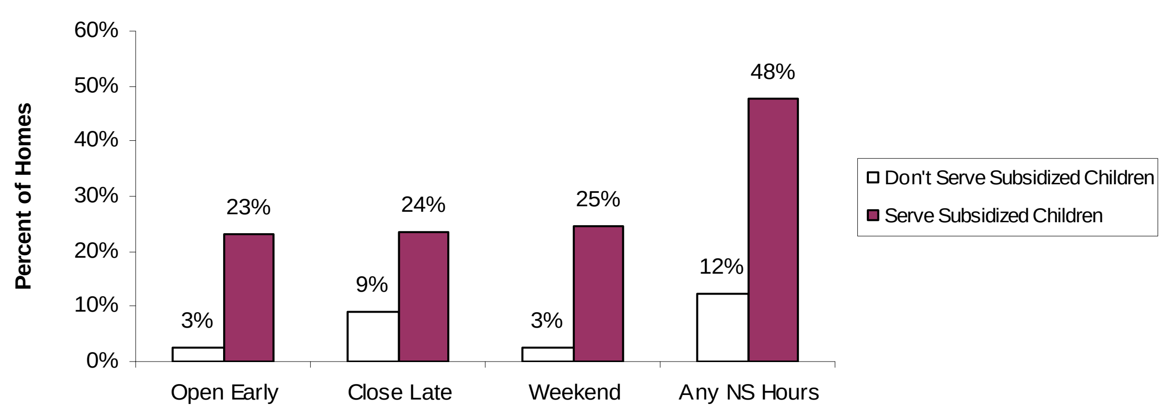
Table 34 presents the proportion of family homes within each DSHS region that currently care for subsidized children and those willing to serve subsidized children. The lowest proportions are found for Region 4.

Table 34: Family Homes Willing to Serve Subsidized Children by Region, 2008

Region	Percent Serving Subsidized Children	Percent Willing to Serve Subsidized Children
1	76.0%	83.5%
2	79.1%	88.8%
3	66.1%	84.3%
4	50.3%	63.4%
5	59.3%	67.1%
6	59.8%	71.6%
All	65.2%	76.7%

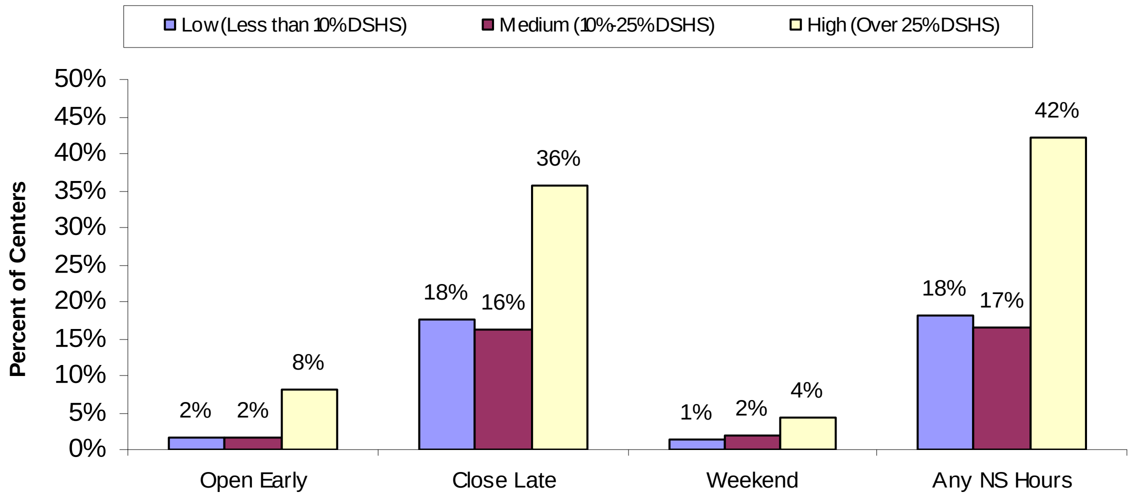
The data in Figure 18 indicate that family homes that accept subsidized children are more accommodating of parents seeking care who have non-standard (other than Monday through Friday, 8 to 5) work schedules than homes that do not take subsidized children. Any non-standard (NS) hours include opening before 6 AM, closing later than 6 PM, or are open on a Saturday or Sunday.

Figure 18: Percent of Family Homes with Non-Standard Hours by Subsidy Status, 2008



Centers were categorized based on their proportion of subsidized children to all children in care: less than 10%, 10% to 25%, and over 25%. As seen in Figure 19, centers reporting over one-fourth of their children subsidized were more likely to offer non-standard (NS) hours.

Figure 19: Percent of Centers with Non-Standard Hours by Subsidy Status, 2008



CHAPTER 9
EXPERIENCES WITH LICENSOR

Less than 5% of respondents from centers indicated that they were uncomfortable calling their licensor (Table 35). Experiences with licensors were characterized as quite favorable. Combined “strongly agree” and “agree” responses demonstrate that 86.4% of individuals from centers receive timely information on changes to licensing policies, 89.9% found that their licensor clearly explained the reasons behind licensing regulations, and 93.9% believed that the licensor clearly explained what their center needed to do to comply with regulations.

Table 35: Distribution of Responses Regarding Attitudes and Experiences with Licensor Among Child Care Centers, 2008

	Strongly Agree	Agree	Disagree	Strongly Disagree	No Opinion/ Not Applicable
I am comfortable calling my licensor when I have a question about regulations	61.8%	33.0%	2.5%	1.6%	1.1%
I receive timely information on changes to licensing policies	35.7%	50.7%	9.4%	2.5%	1.7%
At your most recent licensing visit, the licensor clearly explained to you the reasons behind the licensing regulations	48.1%	41.8%	4.9%	1.6%	3.6%
At your most recent licensing visit, the licensor clearly explained to you what the center needs to do to comply with the regulations	54.4%	39.5%	1.9%	1.0%	3.2%

Most survey respondents from family homes also expressed that they had no hesitation in calling their licensor, and generally had positive experiences with their licensor (Table 36).

Table 36: Distribution of Responses Regarding Attitudes and Experiences with Licensor Among Family Home Providers, 2008

	Strongly Agree	Agree	Disagree	Strongly Disagree	No Opinion/ Not Applicable
I am comfortable calling my licensor when I have a question about regulations	43.5%	44.9%	5.4%	3.5%	2.7%
I receive timely information on changes to licensing policies	29.9%	56.5%	7.1%	1.9%	4.6%
At your most recent licensing visit, the licensor clearly explained to you the reasons behind the licensing regulations	38.2%	50.3%	5.2%	1.7%	4.6%
At your most recent licensing visit, the licensor clearly explained to you what the center needs to do to comply with the regulations	40.5%	48.3%	3.3%	1.2%	6.7%
You felt the licensor regarded you as knowledgeable about, and a professional in, the field of child care	43.5%	45.2%	3.8%	2.7%	4.8%

Table 37 shows that the encouraging responses about licensors do not differ between child care centers and family home providers.

Table 37: Attitudes and Experiences with Licensor by Type of Facility, 2008

	Child Care Centers	Family Home Providers
I am comfortable calling my licensor when I have a question about regulations	3.5	3.2
I receive timely information on changes to licensing policies	3.2	3.1
At your most recent licensing visit, the licensor clearly explained to you the reasons behind the licensing regulations	3.3	3.2
At your most recent licensing visit, the licensor clearly explained to you what the center needs to do to comply with the regulations	3.4	3.1

Note. Averages calculated from responses coded as “Strongly Agree” = 4, “Agree” = 3, “Disagree” = 2, “Strongly Disagree” = 1 and “No Opinion/Not Applicable”= 0. Thus, higher scores equate to more positive responses.

Centers were more likely to call a licensor within the previous year (Table 38). Any delay in response appears to be equivalent between centers and family homes, with licensors of both types of facilities responding on the same day of the inquiry over one-fourth of the time.

Table 38: Experiences with Calling Licensor by Type of Facility, 2008

	0	1+
Child Care Centers		
Number of Times Called Licensor, Previous Year	8.7%	91.3%
Number of Business Days for Call to be Returned	28.5%	71.5%
Family Home Providers		
Number of Times Called Licensor, Previous Year	19.7%	80.3%
Number of Business Days for Call to be Returned	29.9%	70.1%

CHAPTER 10
CHILD CARE PROVIDERS' FEEDBACK

The last question of the 2008 Washington State Child Care Survey read, "The Department of Early Learning is particularly interested in your ideas on how they can better support your professional development, as well as how your local licensing office can better serve you. Please provide a brief statement or a list of ideas for the DEL." Seventy-three percent of survey participants responded to this question and provided feedback related to the following areas:

STARS Training

Twenty percent of comments were related to STARS training. Providers indicated a desire for more advanced STARS classes, including training for special needs and foster children. The main concern expressed greater accessibility to STARS classes, including courses offered on-line and during evenings and weekends.

Experiences with Licensors

Most of the 17% of comments about licensors were positive. Providers suggested that the DEL hire more licensors to reduce their current workload in order to reduce turnover and allow licensors to be more accessible. Providers would like to have more communication with their licensor, possibly through email and drop in visits on a less formal basis. Only 2% of providers reported a negative experience with a licensor.

Educational Opportunities and Workforce

The 2008 Child Care Subsidy Study reports that Washington is expanding "scholarship assistance to providers seeking relevant education and training" (page 17). The desire for increased educational opportunities in fact comprised 12% of comments. Providers requested an increase in support through scholarships or grants to help them pay for their CDA or a degree in Early Childhood Development. Directors of child care centers expressed the need for more qualified and educated lead teachers. Providers indicated that an increase in resources would translate into improved child care. Examples offered by providers included support groups, newsletters, meetings with DEL about regulation changes, and a substitute teacher pool.

DEL

Our review of comments about the DEL revealed that most providers are satisfied with the department's performance. Providers did indicate that they would like to receive more assistance from the DEL, especially when applying for grants to support the costs associated with regulation changes. Among the few negative comments, providers cited that licensing and regulations should be changed for centers offering only school-age care and that the process for background checks needs to be completed sooner. About 3% of comments made reference to the DEL's website. Suggestions for improving the website included: making it easier to navigate, allowing licensed providers to advertise, and post upcoming STARS classes. Some providers suggested developing a system for the public to rate child care facilities.

Pay and Benefits

Feedback on wages and benefits represented roughly 10% of the total comments. Providers indicated that access to benefits, especially affordable health insurance, was very important. Two percent of providers who participated in the last question, stated that they plan to leave the child care business due to the lack of health insurance and adequate pay.

Rules and Regulations

Nine percent of comments were related to concerns about current rules and regulations; with most of these characterized as "there are too many." Respondents also voiced concerns about new policies and regulations, especially if they would require additional expenses. Providers stated that they would like to have more input when the DEL proposes new regulations.

Reimbursement Rates

Six percent of comments can be summarized as providers conveying that low subsidy rates detrimentally impact their business. Offering incentives to providers who care for subsidized children is one strategy that has been implemented in some states to address this problem.[1]

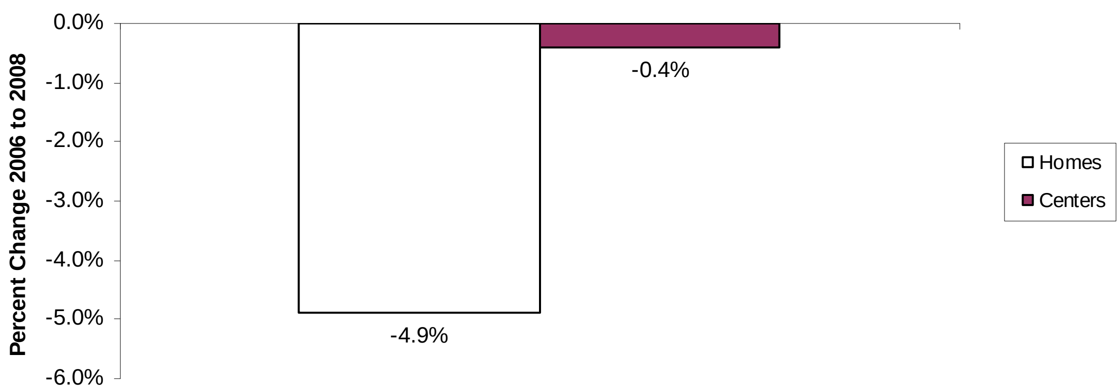
[1] Child Care Subsidy Study, Washington State Department of Early Learning February 21, 2008.

CHAPTER 11
COMPARISON OF FINDINGS FROM RECENT CHILD CARE SURVEYS

From 2006 to 2008, the population of children in Washington State increased 3.0%, but the number of children in licensed care across the state remained relatively unchanged (fell just 0.3%). In fact, the estimated number of children in child care in Washington State has been stable since 2000, fluctuating by only 4,000 children over the last five biennial child care surveys.[2] A recent survey of a random sample of parents in Washington revealed that 35% of children younger than six years received care in a licensed setting – half of pre-Kindergarten children were cared for by immediate family members and 15% by a relative or friend.[3] Perhaps the growth in the number of children overall but not in care is due the number of children receiving family or informal care over the last eight years increasing in proportion to the population growth of children.

The stability in recent years in the number of children in licensed care does not mirror the trend for child care facilities. That is, over the last six years the number of child care facilities has decreased, from 9,456 in 2002 to 7,565 in 2008. The brunt of the decrease has clearly been felt by family homes: there were 25% fewer homes in 2008 than 2002. Between 2006 and 2008 there were an estimated 4.9% fewer homes (n = 284), but just nine fewer centers in operation (Figure 20).

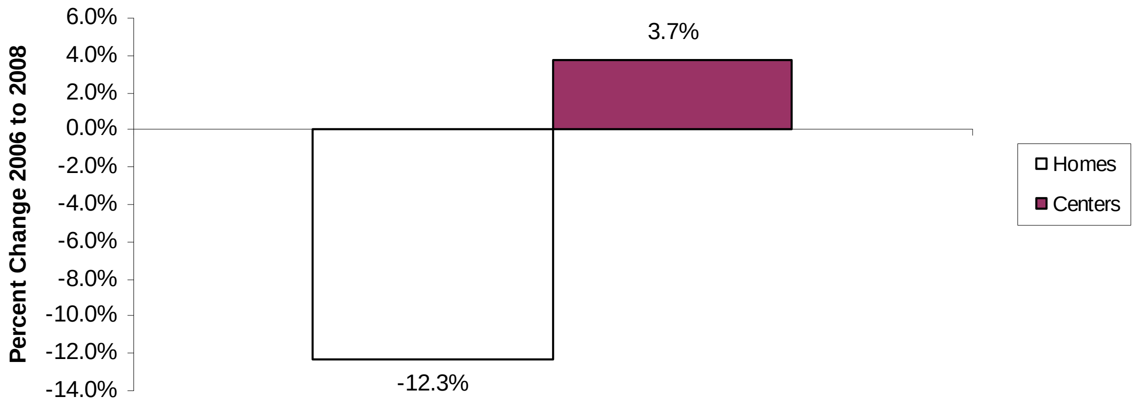
Figure 20: Percent Change in Number of Child Care Facilities by Type of Facility, 2006 versus 2008



[2] Licensed Child Care in Washington State: 2006. Washington State Department of Early Learning. February 2008.
[3] Parent Voices: A Statewide Look. Washington State Department of Early Learning Parent Needs Assessment, June 27, 2008.

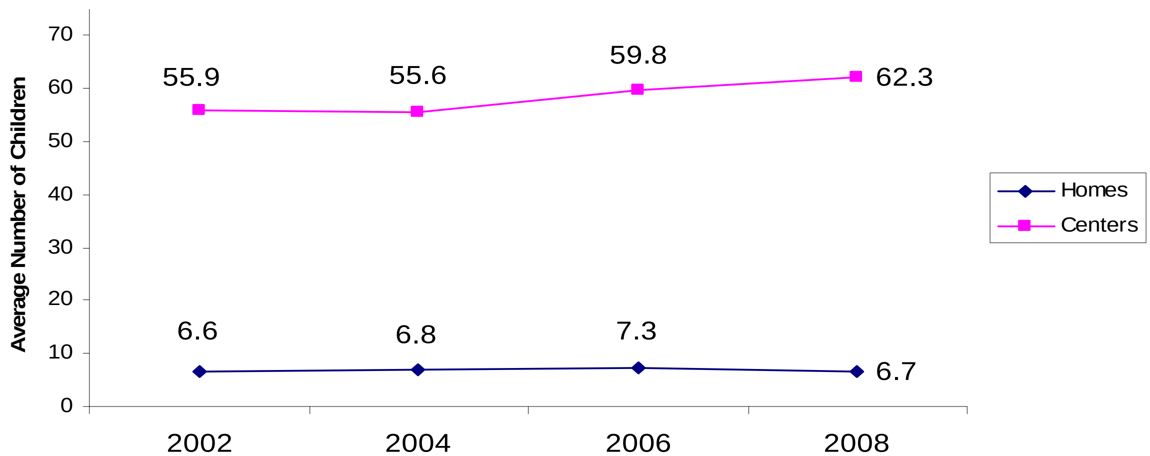
From 2006 to 2008 child care enrollment decreased 12.3% in family homes but increased 3.7% for centers (Figure 21). These percentages translate into 5,146 more children in centers and 4,656 fewer children in care in family homes in 2008.

Figure 21: Percent Change in Number of Children in Licensed Care by Type of Facility, 2006 versus 2008



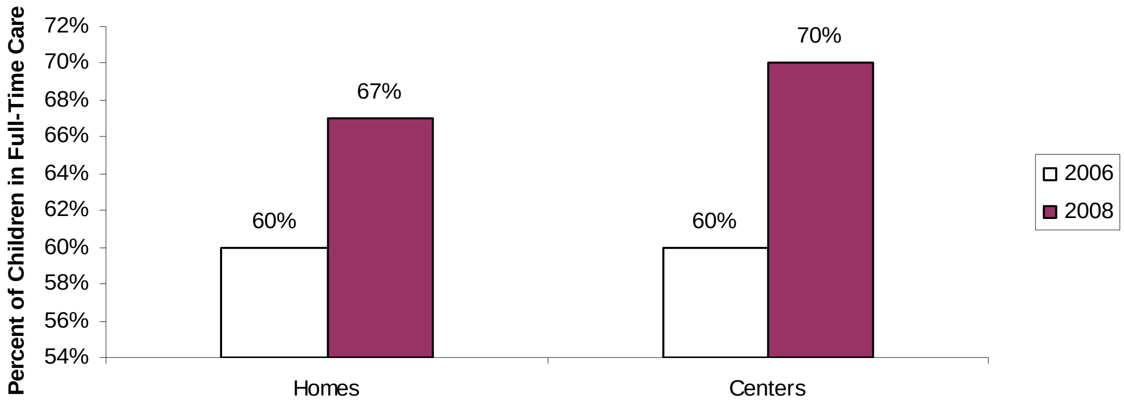
To accommodate more children, centers have increased the average enrollment per facility since 2004 (Figure 22). However, the average number of children per family home declined from 2006 to 2008.

Figure 22: Average Number of Children in Care per Facility by Type of Facility, 2002 to 2008



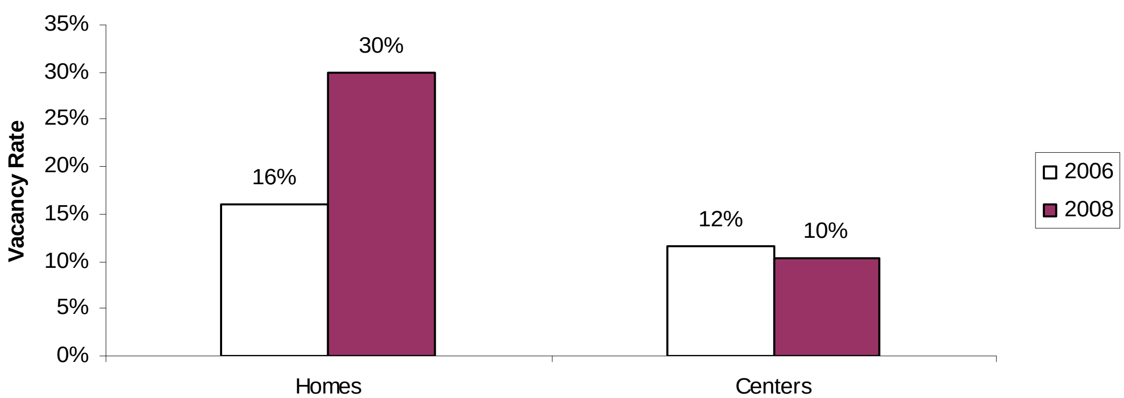
Finally, during the past two years, a greater proportion of children were in full-time versus part-time child care (2006 = 60.3%; 2008 = 69.2%), but the proportional increase in full-time enrollment was greater for centers than homes (Figure 23).

Figure 23: Percent of Children in Full-Time Care by Type of Facility, 2006 versus 2008



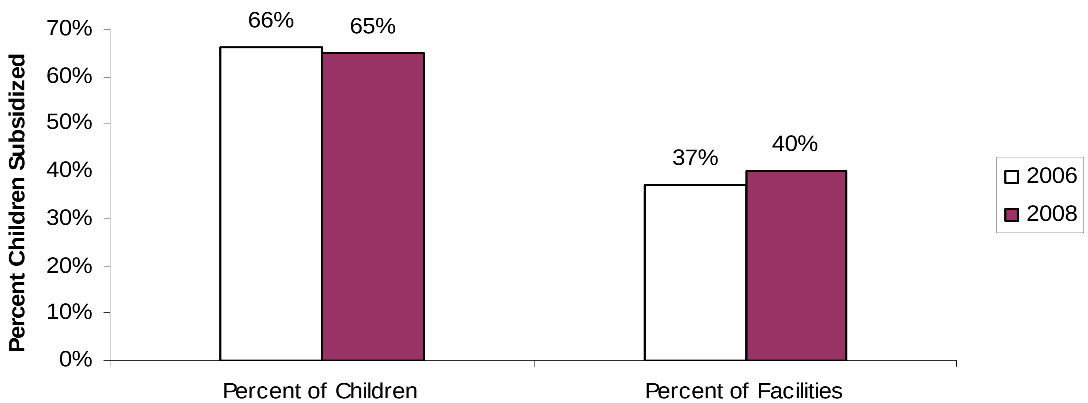
Increased enrollment overall, and specifically for children in full-time care, across a similar number of facilities has allowed centers to maintain a steady vacancy rate, hovering at 10% to 12% (Figure 24). However, decreased enrollment has outpaced the number of facilities throughout the state has resulted in the vacancy rate for family homes nearly doubling to 30% between 2006 and 2008.

Figure 24: Vacancy Rates by Type of Facility, 2006 versus 2008



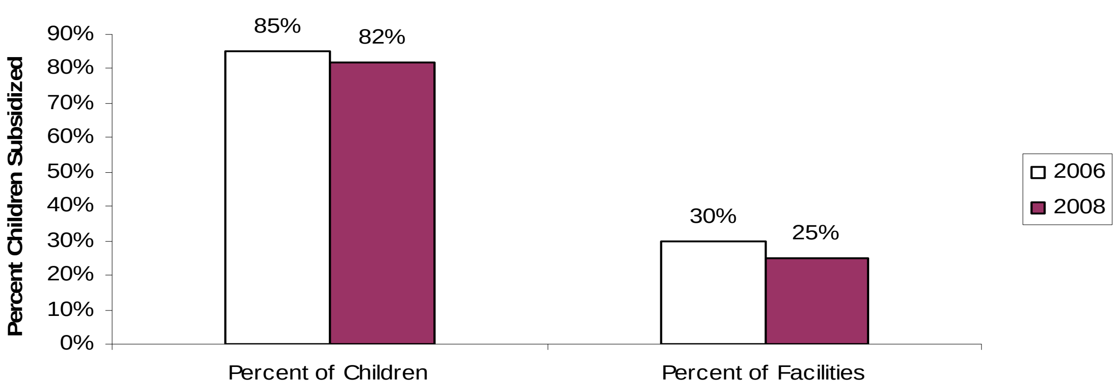
Among family home providers, the percent of subsidized versus non-subsidized children went from 66% to 65% from 2006 to 2008. However, the percent of homes caring for subsidized children increased slightly to 40% over the two year period (Figure 25).

Figure 25: Percent of Children Subsidized Among Family Homes, 2006 versus 2008



The proportion of subsidized children in care at centers also decreased slightly, from 85% to 82% from 2006 to 2008 (Figure 26). In 2006, 30% of centers reported caring for subsidized children; only one-fourth of centers enrolled subsidized children in 2008.

Figure 26: Percent of Children Subsidized Among Child Care Centers, 2006 versus 2008



Convenient or flexible hours were rated as “very important” when choosing a child care facility for 60% of parents in a recent survey.[4] There are no marked differences between centers and homes for those seeking a facility that opens early (Table 39). Parents would be more likely to find a center than a family home that stays open later, although both types of facilities appear to

[4] Parent Voices: A Statewide Look. Washington State Department of Early Learning Parent Needs Assessment, June 27, 2008.

have made efforts to extend their hours to 7 PM since 2006. Increases from 2006 to 2008 were also seen in the percent of centers and homes offering weekend child care.

Table 39: Child Care Availability by Type of Facility, 2006 versus 2008

	Child Care Centers		Family Home Providers	
	2006	2008	2006	2008
Mornings				
Before 6 AM	11%	10%	23%	16%
6 to 7 AM	51%	51%	42%	34%
Evenings				
6 to 7 PM	22%	64%	8%	27%
7 to 8 PM	3%	2%	4%	3%
Later Than 9 PM	3%	1%	6%	6%
Weekends				
Saturday	3%	8%	21%	29%
Sunday	1%	7%	12%	19%

Trends in the average unadjusted price that homes and centers charged for full-time child care are presented in Figure 27; Figure 28 present these data with the rates for 2004 and 2006 adjusted for inflation to 2008 dollars. The non-adjusted data show that rates for homes fell by $10 from 2006 to 2008. As seen in Figure 28, the price of child care – the rate charged by homes and centers – has decreased over the last six years when the data are adjusted for inflation.

Figure 27: Average Rate per Month for Full-Time Child Care by Type of Facility, 2004 to 2008, Not Adjusted for Inflation

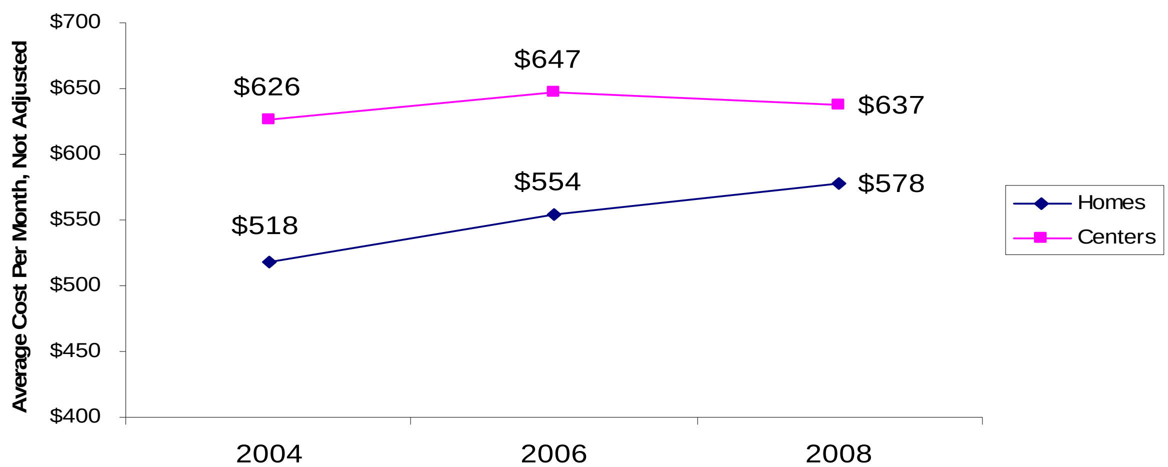
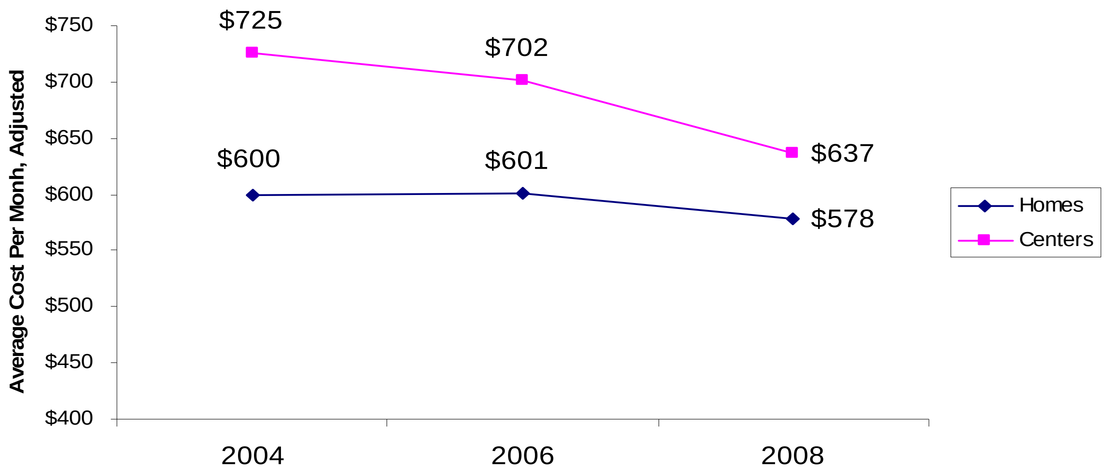


Figure 28: Average Rate per Month for Full-Time Child Care by Type of Facility, 2004 to 2008, Adjusted for Inflation



The average income of staff at child care centers was found to decrease slightly from 2006 to 2008 (Figure 29). Concurrently, child care centers experienced greater levels of turnover (Figure 30), resulting in a workforce with fewer years of experience (Figure 31).

Figure 29: Average Annual Income by Type of Staff Among Child Care Centers, 2006 versus 2008

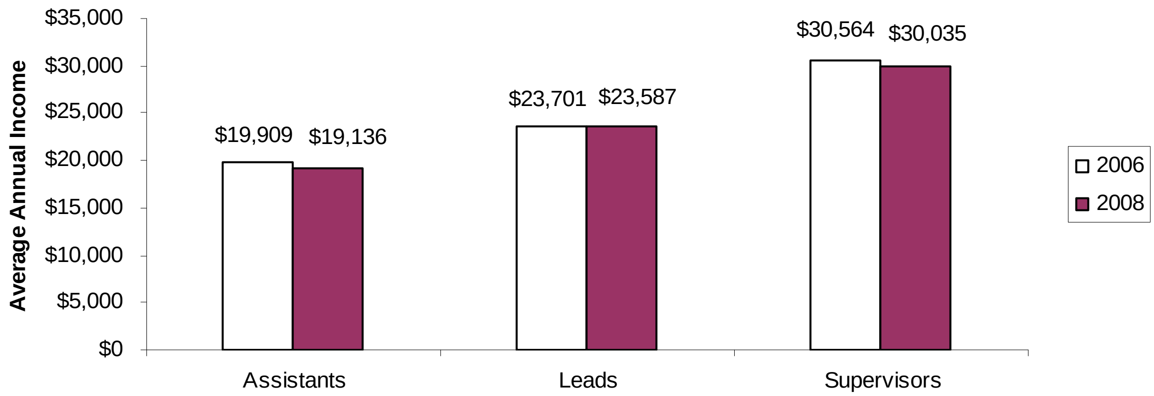


Figure 30: Turnover by Type of Center Staff, 2006 versus 2008

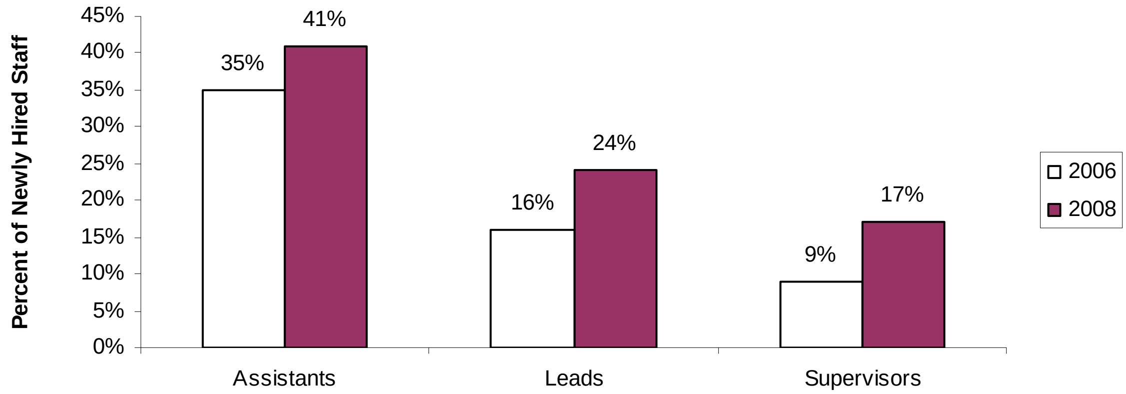
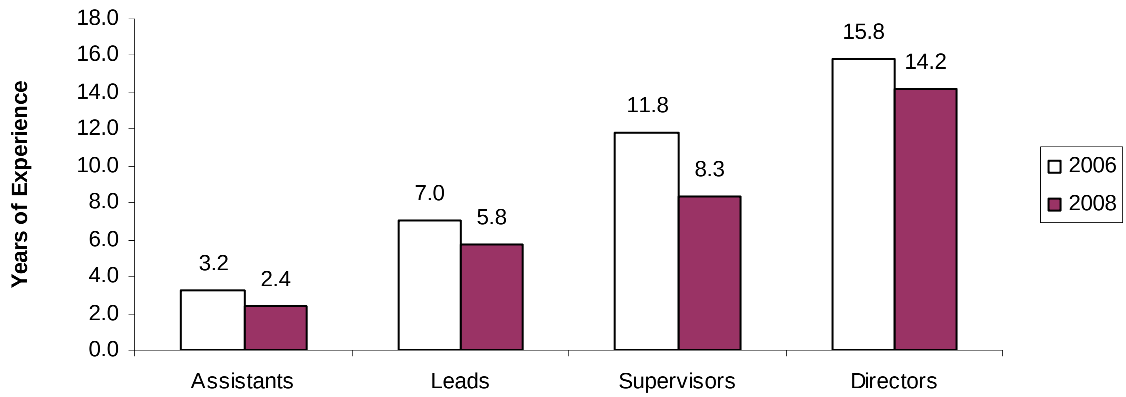
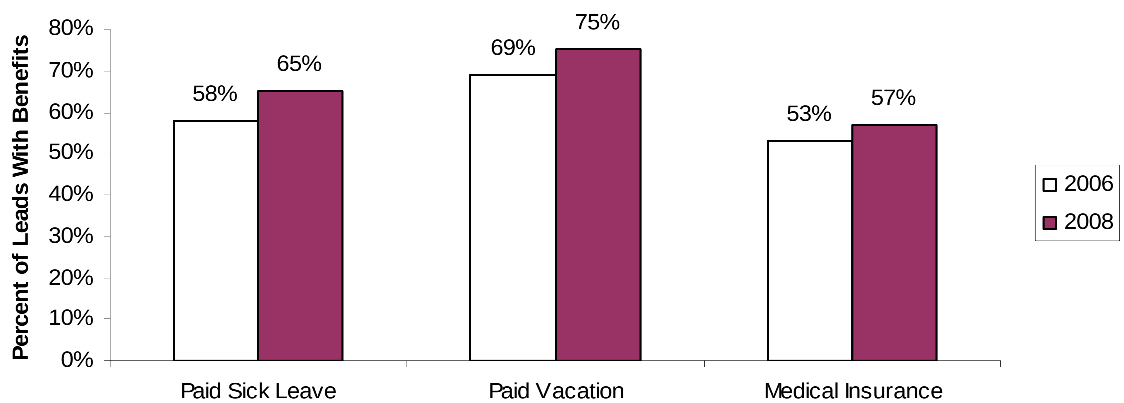


Figure 31: Average Number of Years of Paid Child Care Experience for Center Staff, 2006 versus 2008



In lieu of increased wages, Figure 32 suggests that centers are attempting to provide greater compensation to staff (at least Lead Teachers), and possible address ongoing turnover, by increasing benefits.

Figure 32: Lead Teacher Benefits Among Child Care Centers, 2006 versus 2008



APPENDIX A

STATE OF WASHINGTON

DEPARTMENT OF EARLY LEARNING

May 19, 2008

It is time again for the Department of Early Learning's survey of child care centers and family home child care providers throughout Washington. Your participation in this survey is very important because it will help the Department of Early Learning determine child care availability and costs in our state.
We are excited to announce that for 2008 you can complete the survey online.

Completing the survey online has two advantages:

1. You can answer the questions at a time that is most convenient for you, and
2. The online survey takes less time than completing the survey over the phone.

Completing the survey online will only take about 15 minutes.

You can access the survey with the address: **www.keysurvey.com/del2008**

You must use the 6-digit password on the top of this page to access the survey.

Be sure you keep your password handy. Your password will allow you to return to the survey at the point where you left off if you need to take a break.

Complete the survey by June 6 and you could receive one of five $25 Borders gift cards. Winners will be chosen at random, but you must complete the survey by June 6 to be eligible.

We will be calling you sometime between May 27 and 30 to answer any questions about the survey.
If you complete the survey online before May 27, we won't call you.

During June, we will be conducting reminder calls to those centers and homes that have not completed the survey online. After you complete the survey, we won't call you again.

We strongly encourage you to complete the survey online. However, if you do not have access to a computer, you can complete the survey over the phone. Let us know when we call you May 27 through May 30 if you prefer to complete the survey over the phone.

Nosotros de llamaremos entre el 27 al 30 de Mayo para ser una cita para la entrevista con unos de nuestros explayados que hablan español.

You can be assured that your answers will remain confidential. The Department of Early Learning uses a private third party to conduct the interviews. All responses will be combined so that no one can be identified in the final results presented to the Department of Early Learning.
All information that could identify you will be destroyed after the survey is completed.

YOUR COOPERATION IS VERY MUCH APPRECIATED. THANK YOU!

QUESTIONS? Please send an email to Summerlynn at sanderson@wrma.com

APPENDIX B

SURVEY METHODS

The population for the Washington 2008 Child Care Survey consisted of 2,083 centers and 5,482 family homes listed in the DEL licensed child care database in April 2008. Recruitment for the survey targeted all centers and a simple random sample of 1,346 homes.

Letter of Introduction

The Letter of Introduction to the survey was mailed to all 3,486 facilities on May 16, 2008. The letter explained that the survey was available on-line, and included the address and the facility's unique password to access the survey. The Letter of Introduction also indicated that those who completed the survey by June 6 were eligible to receive one of five $25 Borders gift cards.

Data Collection

In response to the Letter of Introduction, completed surveys began to appear in the web-based system on May 19. The telephone contact phase of the project, which included encouraging facilities to complete the survey on-line, occurred from May 27 to July 11. Telephone surveys in English and Spanish also were conducted during this phase of the project. The on-line survey was discontinued on July 13. Thus, data collection for the project occurred for eight weeks, from May 19 to July 13.

From May 19 to 26 (designated as Week 1 of the survey), 292 surveys were completed on-line. During Week 2, interview staff called all the 3,194 remaining facilities. The primary objectives of Week 2 were to ensure that all facilities with current and working phone numbers were aware of the survey and had the address and required password to access the survey on-line. These objectives were achieved by reading a standardized script to facility staff, or on answering machines, depending on the outcome of the call. The secondary objectives were to identify those facilities with Spanish speaking staff or without computer access for eventual participation in telephone surveys. Interviewers were prepared to respond to inquiries regarding the purpose and duration of the survey, and other related questions, during these calls. The outcome of each of the 3,194 calls made during Week 2 (and the subsequent weeks of the telephone contact phase) is displayed in Table A.

English and Spanish phone interviews began during Week 3. Follow-up calls were also made to those sites where the script was left as an answering machine message during the previous week. In cases where these subsequent calls were answered by a machine, interviewers recited an expanded script, which included instructions for contacting the project director to schedule a telephone interview.

During Week 4 interviewers accessed directory assistance websites to attempt to retrieve new telephone numbers for centers and homes without a DEL-provided telephone number (n = 12), and for facilities found to have disconnected or incorrect numbers during the prior two weeks, or had phone numbers that continuously rang or were repeatedly busy. As a result of these efforts, new phone numbers were identified for 148 of 377 facilities. Interviewers then used the same script and procedures implemented during Week 2 to call these 148 facilities.

Follow-up calls occurring in Weeks 5, 6, and 7 included inviting staff to participate in a telephone survey, either at the time of the call or at a later date and time, depending on staff's preference. The final week of the telephone contact phase of the survey – Week 8 – included calling all those sites that had not completed the survey by July 7 in a final attempt to schedule a telephone survey. Figure A graphically depicts the number of surveys completed over the 8-week period.

Coordination of Survey Activities

Implementation of all procedures and the ongoing monitoring of the outcome of telephone contacts were centralized to ensure the most efficient use of interviewers' time and to obtain accurate and maximum survey participation rates. Special care was given to coding facilities with staff who had explicitly expressed that they did not want to be called again about the survey. The passwords for sites responding to the on-line survey were continuously downloaded from the web-based system and distributed to the interview staff during the telephone contact phase of the survey to avoid unnecessary calls.

Identifying Surveys Completed for Multiple Facilities or Licenses

The biennial DEL Child Care Survey includes instances where one central facility or agency will complete one survey with responses based on two or more facilities under the same ownership or management. Identifying these occurrences is vital for presenting accurate findings.

The ongoing distribution of passwords to interviewers for those sites that completed the survey on-line allowed for identifying these multi-facility surveys. That is, when facility staff told the interviewers that they had already completed the survey (in contrast to our records), the interviewer would ask whether the survey included responses for more than one facility or license. In such cases, the interviewers collected additional information, such as the passwords, phone numbers, and names of the facilities. A search through the master database was then conducted to flag these facilities as having "completed" the survey. During telephone interviews, multi-facility surveys were identified by simply inquiring as to whether responses were based on one or more facilities.

Training of Interview Staff

Preparations for the telephone surveys included each interviewer familiarizing him or herself with the survey instructions, questions, and response options, and then taking turns practicing the administration of the survey with fellow interviewers. Prior to completing actual telephone surveys, interviewers had to demonstrate competence and familiarity in reading the questions and response options and following survey protocols to the project director.

Outcome of Survey

A total of 185 of the 2,140 centers were deemed to be ineligible (Table B). Based on the number of completed interviews among eligible centers, a participation rate of 54.5% was obtained. Among homes, 60.5% of eligible facilities completed the survey, either on-line or through telephone interviews (Table C).

Definitions and Procedures for Calculating Population Estimates

Children are identified in this report by the following age groups, in accordance with the DEL's licensing regulations and subsidy categories:

> ***Infant*** = under 12 months of age;
> ***Toddler*** = 12 to 29 months of age;
> ***Preschooler*** = 30 months up to kindergarten entry (or 5 ½ years old);
> ***School-Age*** = kindergarten (or > 5 ½ years) to 12 years old.

Children in ***Kindergarten*** are distinguished from school-age children in some cases for comparability with findings from previous DEL Child Care Surveys. In a few cases data from children receiving care in family homes are presented by those less than two years versus two years or older, again to coincide with the method used in past reports.

Population estimates were based on the number of centers and homes from which survey data were obtained (not the actual number of surveys completed). Omitted from these calculations were the centers and homes determined to be ineligible for the survey post-data collection. Thus, survey responses related to 1,038 centers were used to project population estimates for a total of 2,083 centers, and projected population estimates for homes were from data based on 704 facilities in the population of 5,482 homes.

Table A: Weekly and Final Outcome of Telephone Contacts with Centers and Homes, May 27 to July 11, 2008

	Code	Week 2 Initial Calls	Week 3 Follow-up AM Calls	Week 4 Follow-up DN, WN, UR Calls	Week 5 Follow-up RC Calls	Week 6 Scheduling 1	Week 7 Scheduling 2	Week 8 Final Calls	Final Outcome
Staff Reached / Script Completed	RC	1374	310	61	884	853	633	420	**
Staff Reached / Script Uncompleted	RN	68	12	2	3	48	40	**	**
Did Not Call / Survey Completed On-line	NC	46	59	25	211	**	**	**	**
Script Left on Answering Machine	AM	947	420	36	161	507	441	401	226
Staff Requested Telephone Survey	CP	134	5	3	17	**	**	**	**
Staff Requested Do Not Call Back	DNC	95	46	8	32	187	165	95	634
Duplicate Numbers Already Contacted	DLMS	121	22	3	38	**	**	**	**
Identified as Speaking Spanish	SL	143	15	1	5	0	0	0	**
Identified as Speaking Other Language	OL	6	3	0	0	2	2	0	13
Disconnected Number	DN	123	2	**	**	7	5	1	**
Wrong Number	WN	46	14	**	**	15	4	16	**
Phone Number Missing From List	NM	12	**	**	**	**	**	**	**
Unanswered Call	UR	79	18	21	17	50	52	27	24
No New Numbers Found	NNN	**	**	134	**	13	8	46	229[1]
Survey Partially Completed by Phone, Requested DNC	PD	**	1	0	1	5	1	0	8

		Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	
	Code	Initial Calls	Follow-up AM Calls	Follow-up DN, WN, UR Calls	Follow-up RC Calls	Scheduling 1	Scheduling 2	Final Calls	Final Outcome
Survey Partially Completed by Phone, Requested Finish Later	PL	**	0	0	0	1	2	0	3
Survey Partially Completed On-line, Did Not Want to Finish	POD	**	**	**	**	1	2	7	10
English Telephone Survey Completed[2]	CT	**	99	62	171	141	129	76	678
Spanish Telephone Survey Completed	CTS	**	14	77	19	6	1	2	119
Completed On-line[3]	CO	251	167	124	50	29	17	37	967

[1] Includes "No New Number" outcomes for calls during Weeks 3 to 8.
[2] Includes completed telephone surveys for all participants requesting telephone surveys. Twenty of the 99 telephone surveys completed in Week 3 resulted from answering machine follow-up calls, and 43 of the 171 telephone surveys completed during Week 5 were directly from following up on RC calls.
[3] Numbers reflect surveys completed on-line during the weeks and not solely as result of follow-up calls.

Figure A: Number of Facilities Participating in the 2008 Child Care Survey by Week

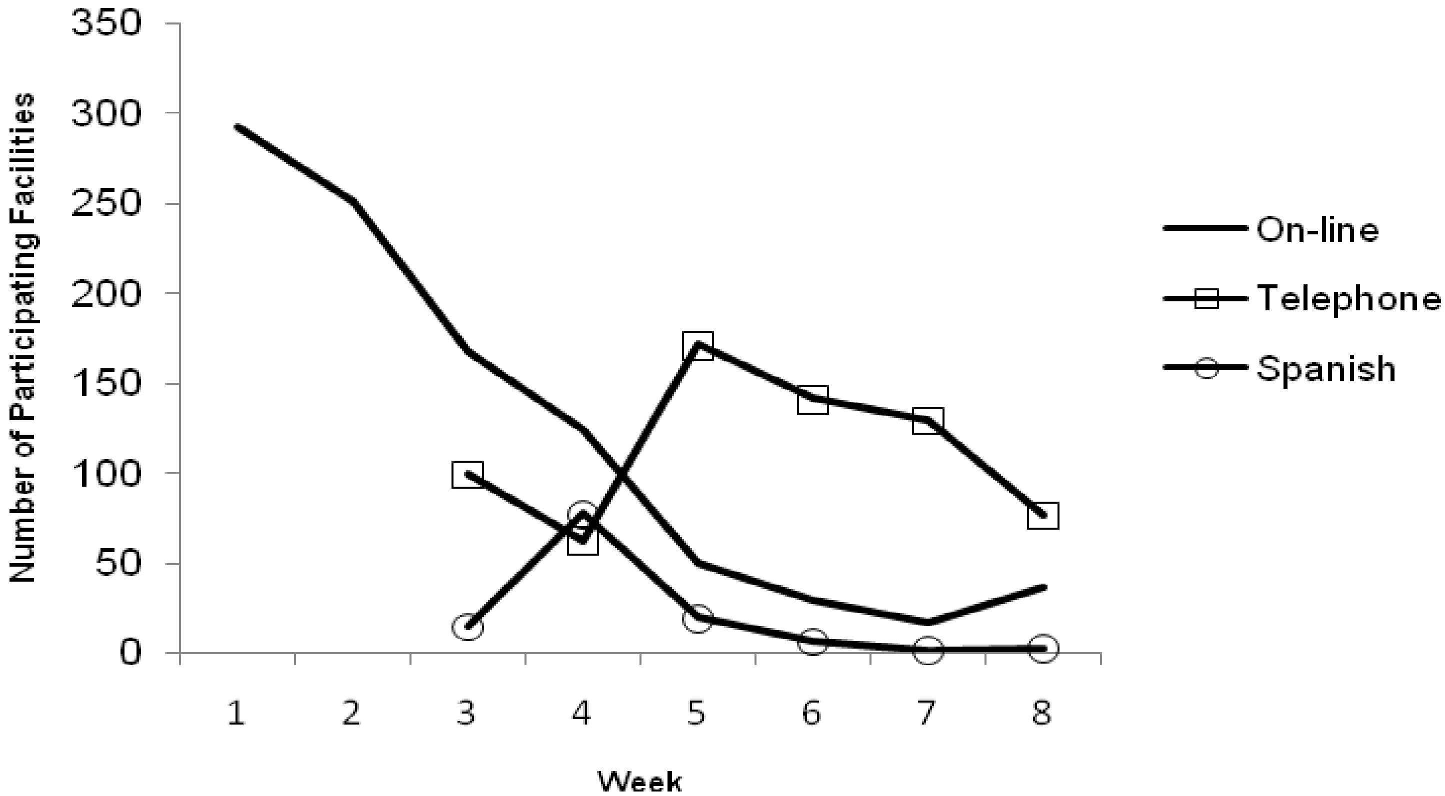


Table B: Final Outcome of Survey of Child Care Centers, 2008

	Number of Centers	Sub-Total Percent	Grand Total Percent
Fully Completed Interviews[1]	1,055		
English Phone Interviews	376		17.6%
Spanish Phone Interviews	4		0.2%
On-line Administration	675		31.5%
Partially Completed Interviews	11		
Phone Partial Completed, Unavailable to Finish	2		0.09%
Phone Partial Completed, Do Not Call Back	2		0.09%
On-line Partial Completed, Do Not Call Back	7		0.3%
Fully & Partially Completed Interviews	1,066	54.5%	
Did Not Participate[2]	362	18.5%	16.9%
Refused	395	20.2%	18.5%
Answering Machine[3]	132	6.8%	6.1%
Sub-total for Eligible Centers	1,955	100%	
Excluded Child Care Centers			
Closed for the Summer	76	41.1%	3.6%
Unanswered Calls[4]	15	8.1%	0.7%
Non-working Numbers[5]	91	49.2%	4.3%
Language Unknown[6]	3	1.6%	0.1%
Sub-total for Ineligible Centers	185	100%	
TOTAL SAMPLE	2,140		100%

[1] Twenty-three child care centers responded on-line with information about more than one facility. Thirty telephone surveys obtained data about more than one center.
[2] After seven weeks of repeated telephone contacts, which included providing the website address and password during each phone call and offering the option of a telephone interview, these centers never participated in the survey.
[3] The outcome of repeated calls for seven weeks was leaving scripted messages on answering machines.
[4] Initial and new phone numbers obtained from directory assistance were always busy or continuously rang.
[5] Initial missing, wrong, or disconnected telephone numbers without new numbers available through directory assistance.
[6] Languages other than English or Spanish.

Table C: Final Outcome of Survey of Family Home Providers, 2008

	Number of Homes	Sub-Total Percent	Grand Total Percent
Fully Completed Interviews[1]	709		
English Phone Interviews	302		22.4%
Spanish Phone Interviews	115		8.5%
On-line Administration	292		21.7%
Partially Completed Interviews	10		
Phone Partial Completed, Unavailable to Finish	1		<0.1%
Phone Partial Completed, Do Not Call Back	6		0.4%
On-line Partial Completed, Do Not Call Back	3		0.2%
Fully & Partially Completed Interviews	719	60.5%	
Did Not Participate[2]	137	11.5%	10.2%
Refused	239	20.1%	17.8%
Answering Machine[3]	94	7.9%	7.0%
Sub-total for Eligible Homes	1,189	100%	
Excluded Family Home Providers			
Unanswered Calls[4]	9	5.7%	0.7%
Non-working Numbers[5]	138	87.9%	10.3%
Language Unknown[6]	10	6.4%	0.7%
Sub-total for Ineligible Homes	157	100%	
TOTAL SAMPLE	1,346		100%

[1] One respondent provided information about two homes.
[2] After seven weeks of repeated telephone contacts, which included providing the website address and password during each phone call and offering the option of a telephone interview, these centers never participated in the survey.
[3] The outcome of repeated calls for seven weeks was leaving scripted messages on answering machines.
[4] Initial and new phone numbers obtained from directory assistance were always busy or continuously rang.
[5] Initial missing, wrong, or disconnected telephone numbers without new numbers available through directory assistance.
[6] Languages other than English or Spanish.