Supplemental Appendix A

Detailed Report of Georgia's Early Care and Education Economic Impact Survey

The body of the Economic Impact of the Early Care and Education Industry in Georgia report derived much of its data from Georgia's Early Care and Education Economic Impact Surveys, three surveys designed in 2014 to provide a comprehensive profile of Georgia's early care and education industry. This appendix offers a detailed accounting of these surveys, including regional breakdowns of the results when possible. Specifically, this appendix describes the children served by Georgia's early care and education industry, the operations of the businesses composing the industry, and the industry's workforce. Appendix B provides details about the survey methodology.

In 2014, Bright from the Start: Georgia Department of Early Care and Learning (DECAL) contracted with the University of Georgia's Carl Vinson Institute of Government and the Andrew Young School of Policy Studies at Georgia State University to survey all licensed and regulated early care and education programs in the state of Georgia in order to gather the data needed to estimate the annual economic impact of the early care and education industry in Georgia. This study replicates a similar 2007 study also commissioned by DECAL. That study estimated that the industry contributed $4.1 billion in economic activity in 2007 and provided direct and indirect employment for more than 74,000 individuals in Georgia. As Chapter 4 of the main report discussed, the economy has since changed due to the Great Recession, which began in late 2007 and lasted through February 2010, generating high rates of unemployment. Georgia lost nearly 333,000 jobs, and the subsequent recovery has been slow. Given these major changes in economic activity and the link that early education has in supporting the labor force, 2014 was an opportune time to update the analysis of the economic impact of the industry.

For the purposes of this study, the early care and education industry is defined as all early care and education programs licensed or regulated by DECAL, which includes programs serving children ages birth through five as well school-age children up to age 13 who attend after-school, before-school, and summer programs. Nonlicensed, nonregulated care is not included in this analysis. Such nonparental care, provided by grandparents, other relatives, friends, or neighbors, may be free of charge or for pay.[1]

[1] This economic analysis does include data provided by DECAL on the federal Child Care and Development Fund subsidies paid on behalf of low-income, working families. A very small percentage (<5%) of these subsidies in Georgia are reimbursed to family, friend, or neighbor providers who are nonlicensed but meet certain program requirements.

The industry described in this study comprises five primary types of early care and education programs:

- **Child care learning centers** are programs operated by a person, society, agency, corporation, institution, or group that receives pay for group care. The child care learning center cares for 19 or more children under the age of 14 for less than 24 hours per day.
- **Family child care homes** are programs that operate in a private residential home less than 24 hours per day and provide care for three to six children under the age of 14 for pay.
- **Group child care homes** are programs operated by a person, society, agency, corporation, institution, or group that receives pay for group care. Such providers care for seven to 18 children under the age of 14 for less than 24 hours per day.
- **Georgia's Pre-K Program** is a voluntary, universal educational program for Georgia's four year olds to prepare children for kindergarten. The program is funded by the Georgia Lottery for Education. Georgia's Pre-K classrooms are housed in public schools and in private child care learning centers.
- **Early Head Start and Head Start** sites are federally funded programs that provide comprehensive early childhood and family development services to children from birth to five years old, pregnant women, and families. In Georgia, many Head Start programs work with Georgia's Pre-K programs to braid funds to increase the services that they can provide. In 2014, DECAL was one of the few state agencies to receive funding to deliver Early Head Start services through partnerships with licensed early care and education programs.

Ultimately, the research team wrote three slightly different versions of the same survey: one designed for early care and learning centers, a second for family child care homes, and a third for school districts that offer Georgia's Pre-K Program.

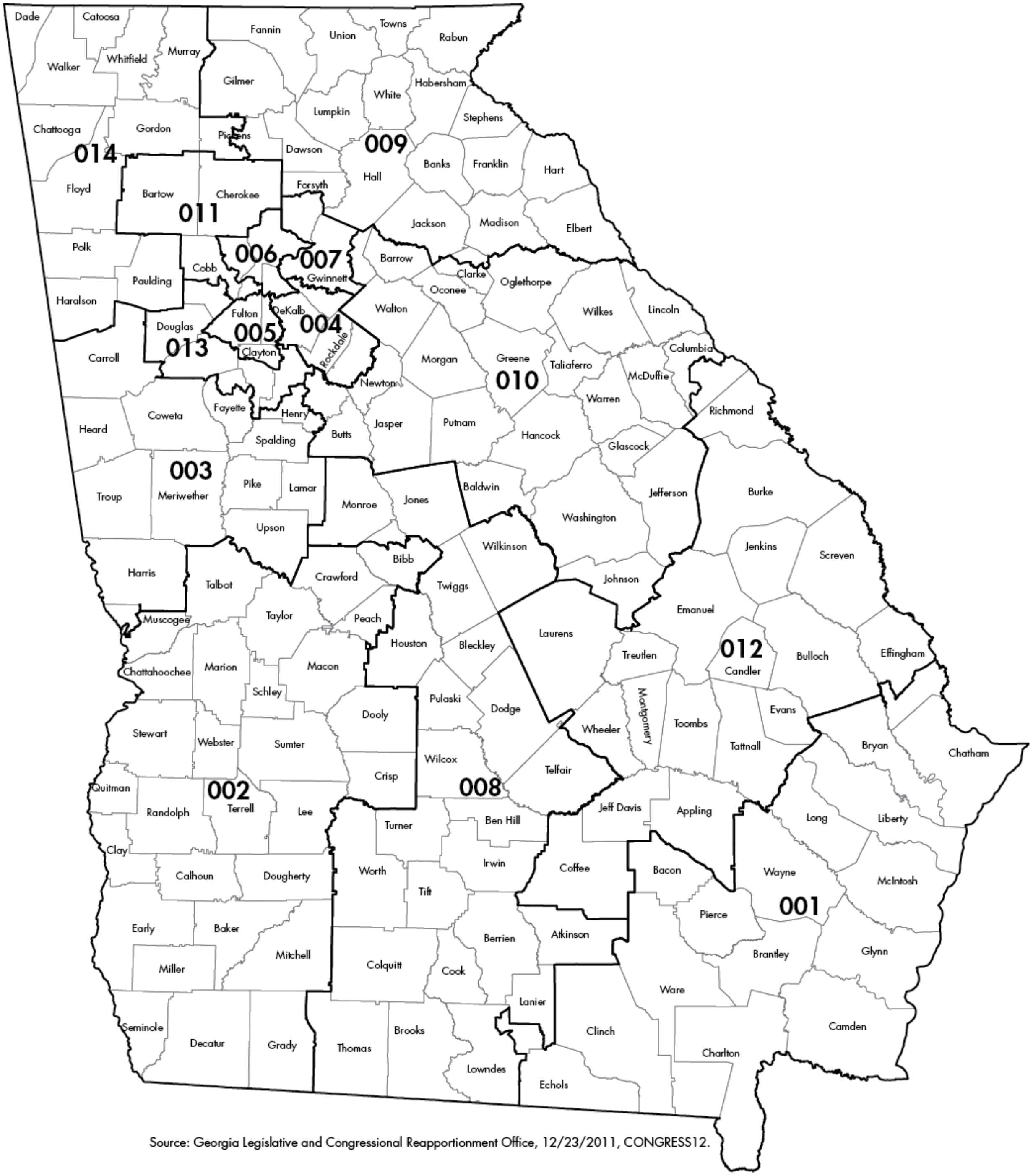
The survey designed for early learning centers was mailed to 3,254 facilities, which included 2,888 early care and education centers (including those private child care centers that provide Georgia's Pre-K), 226 group child care homes, numerous Early Head Start and Head Start sites, and 11 military early care and education centers.

The family child care home version of the survey was sent to 2,308 family child care homes. The questionnaire tailored to schools was sent to 170 school districts that offer Georgia's Pre-K. These districts account for 771 schools, each with at least one Georgia's Pre-K classroom. The 124 districts that responded represent 599 schools.

In 2015, a total of 3,268 Georgia early care and education programs completed or partially completed a questionnaire. The combined surveys had a 52% response rate, which is generally higher than the response rate of other statewide surveys. For example, this rate is higher than the 46.5% attained by the 2013 Behavioral Risk Factor Surveillance System survey conducted in Georgia (CDC 2014). Some programs did not answer all questions on the survey, so especially low or high response rates for individual questions are noted throughout this appendix. The data cited in this appendix are largely based on responses to the surveys only.

Where appropriate, data are presented in tables that separate out responses from the three types of child care facilities: child care learning centers, family child care homes, and public schools housing Georgia's Pre-K Program classrooms. In addition, data are presented by the 14 congressional districts in Georgia where appropriate. The map in Figure A.1 identifies Georgia's 14 congressional districts.

Figure A.1 Georgia's 14 Congressional Districts



Source: Georgia Legislative and Congressional Reapportionment Office, 12/23/2011, CONGRESS12.

PROFILES OF THE CHILDREN SERVED BY GEORGIA'S EARLY CARE AND EDUCATION PROGRAMS

The survey asked early care and education programs to describe the children they were serving at the time of the survey—late October 2014 through April 2015. This section uses survey data to detail the number of children served by the type of program they attend and the locations of children and programs. It also describes the number of children (1) receiving federal nutrition program assistance, (2) receiving federal Childcare and Parent Services (CAPS) subsidies, (3) with identified special needs, (4) receiving services from Babies Can't Wait (BCW), and (5) whose language spoken at home is not English. Information on the racial/ethnic demographics of the children served is also included.

Number of Children Served

The total enrollment reported by programs that responded to the questionnaire was 164,044. Table A.1 shows the reported enrollment distributed by the congressional district in which the responding programs were located. Chapter 2 used this survey data along with additional enrollment data from Head Start and the Georgia's Pre-K Program to estimate that 337,024 children are being served by licensed or regulated early care and education programs in Georgia. Using the percentage distribution of the enrollment reported in this study, the number of children in care ranges from a minimum of 18,774 children in care in the 9th Congressional District to a maximum of 29,130 children in care in District 7.

Table A.1. Number of Children Enrolled in Responding Child Care Learning Centers, Family Child Care Homes, and Public Schools with Georgia's Pre-K Program Classrooms and Estimated Number of Children in Licensed Child Care in Georgia by Congressional District

Congressional District	Number of Children Enrolled in Responding Programs	Percent of Enrolled Children	Estimated Total Number of Children in Care
1	13,780	8.4	28,311
2	12,954	7.9	26,613
3	11,724	7.1	24,087
4	11,268	6.9	23,149
5	13,385	8.2	27,500
6	9,460	5.8	19,435
7	14,179	8.6	29,130
8	13,475	8.2	27,685
9	9,138	5.6	18,774
10	9,689	5.9	19,906
11	11,273	6.9	23,161
12	10,997	6.7	22,593
13	12,201	7.4	25,066
14	10,521	6.4	21,615
Total	164,044	100.0	337,024

According to survey responses, even though child care learning centers compose approximately 51.4% of the state's programs, they serve approximately 85% of the children in care (Table A.2). Public school–based Georgia's Pre-K programs, 12.2% of programs, care for 11.2% of children in care. Family child care homes, comprising 36.4% of programs, serve 3.8% of the state's children. Because family child care homes are permitted to care for a maximum of six children, they account for a much smaller percentage of the overall children in facilities across the state. If the 337,024 children being served by licensed child care centers and family child care homes and schools were apportioned similarly to the enrollments reported in this study, 286,452 would be attending child care learning centers, 12,807 would be enrolled in family child care homes, and 37,765 would be attending Georgia's Pre-K in public schools.

Table A.2. Estimated Number of Children in Licensed Child Care in Georgia by Program Type

Program Type	Estimated Number of Programs in Georgia		Estimated Number of Children in Care in Georgia by Program Type	
	Number	Percent	Number	Percent
Child Care Learning Centers	3,254	51.4	286,452	85.0
Family Child Care Homes	2,308	36.4	12,807	3.8
Public Schools	771	12.2	37,765	11.2
Total	6,333	100.0	337,024	100.0

Provider Locations

Of the programs that responded to the survey, 79.9% are located in urban areas (counties with populations above 35,000), and 20.1% are located in rural areas (Table A.3). Among the study's responding programs, 83.1% of the children enrolled in care are located in urban areas and 16.9% in rural areas.

The US Census estimated that in 2010, 75.1% of Georgia's residents lived in urban areas and 24.9% in rural areas (US Census 2012). US Census data also indicate that 65.6% of children under six years old in Georgia's urban areas live in households in which all parents work. The figure for rural Georgia is only slightly smaller, 63.7%. Although numerous factors may affect the need for child care in rural areas (e.g., population density, distance), if children ages birth to 13 are proportional to Georgia's total population, these figures indicate that rural areas may need more providers than currently exist (US Census Bureau 2009–2013 Five-Year American Community Survey).

Table A.3. Location of Early Care and Education Programs in Georgia

		Type of Program			
		Child Care Learning Centers	Family Child Care Homes	Schools	Total
Rural	Number	277	261	118	656
	Percent	18.5	22.3	19.7	20.1
Urban	Number	1,219	912	481	2,612
	Percent	81.5	77.7	80.3	79.9
Total	Number	1,496	1,173	599	3,268
	Percent	100.0	100.0	100.0	100.0

Number of Children Receiving Federal Food Assistance

Children in early care and education programs may be enrolled in facilities that offer the US Department of Agriculture's Child and Adult Care Food Program (CACFP) and Summer Food Service Program. Families qualify for nutrition services based on income eligibility guidelines. Programs were asked to indicate the total number of children in their programs who receive these services. Table A.4 displays the percentage of children receiving CACFP subsidies within the 14 congressional districts in Georgia across child care learning centers and family child care homes, based on survey responses. Schools are not eligible for CACFP subsidies, so they are not included in this table. Across the state, an average of 38.3% of children in responding child care learning centers and family child care homes receive CACFP subsidies. Across the state, children in family child care homes are more likely to receive CACFP subsidies than those in child care learning centers—70.6% versus 36.6%, respectively.

Table A.4. Percentage of Children Receiving CACFP Meal Subsidies by Congressional District

Congressional District	Child Care Learning Centers (N=115,092)	Family Child Care Homes (N=5,986)	All Programs (N=121,078)
1	34.9%	71.2%	37.4%
2	49.1%	76.7%	50.9%
3	46.9%	60.7%	47.3%
4	42.5%	75.7%	45.3%
5	48.8%	68.6%	49.3%
6	8.5%	55.3%	10.0%
7	21.6%	70.7%	23.0%
8	38.2%	75.3%	41.1%
9	38.6%	67.8%	39.8%
10	32.5%	76.7%	35.2%
11	25.7%	57.6%	26.6%
12	42.0%	64.2%	43.3%
13	50.6%	77.7%	52.4%
14	35.5%	58.1%	36.3%
Statewide	36.6%	70.6%	38.3%

On average, directors of Georgia's Pre-K programs in public schools who answered the question estimate that 68.9% of children in school-based programs across the state receive free or reduced-price lunch. Table A.5 displays the percentage of school-based Georgia's Pre-K students who receive free or reduced-price lunch by congressional district.

Table A.5. Percentage of Children Attending Georgia's Pre-K in Public Schools that Receive Free or Reduced-Price Meals, by Congressional District

Congressional District	Schools (N=29,105)
1	49.1%
2	83.4%
3	53.5%
4	67.2%
5	73.3%
6	65.9%
7	--
8	71.0%
9	64.4%
10	72.1%
11	66.0%
12	90.2%
13	78.9%
14	63.4%
Statewide	68.9%

Note: Cells with fewer than five cases are not reported.

Children Receiving CAPS Subsidies

Programs were polled about the number of children in their early care and education environments who receive child care subsidies from the federal CAPS program, which subsidizes a portion of the cost of early care and education for low-income, working families. CAPS is funded through the federal Child Care and Development Fund and state matching funds. The CAPS program is administered in all 159 Georgia counties by DECAL. Child care learning centers and family child care homes were asked to indicate the number of children receiving such subsidies. Schools were not asked this question. Across the state, an average of 19.7% of children in responding child care learning centers and 20.2% of children in family child care homes receive CAPS subsidies. Table A.6 shows these data by congressional district. Approximately 6% of survey respondents did not answer this question.

Table A.6. Percentage of Children Receiving CAPS Subsidies by Congressional District

Congressional District	Child Care Learning Centers (N=120,157)	Family Child Care Homes (N=6,086)	All Programs (N=126,243)
1	15.5%	30.7%	16.5%
2	33.5%	31.5%	33.3%
3	17.5%	18.7%	17.5%
4	30.4%	20.6%	29.6%
5	30.7%	29.6%	30.7%
6	4.0%	4.0%	4.0%
7	10.2%	10.8%	10.2%
8	24.4%	21.9%	24.2%
9	9.6%	7.1%	9.5%
10	19.5%	17.7%	19.4%
11	10.9%	12.8%	11.0%
12	21.9%	13.9%	21.5%
13	32.0%	20.2%	31.2%
14	14.3%	15.9%	14.4%
Statewide	19.7%	20.2%	19.8%

Children Diagnosed with Disabilities

Programs were asked to supply the number of children diagnosed with disabilities in their care. Specific diagnoses were not requested; rather, programs were asked only to indicate the number of children with a confirmed diagnosis. Across all districts, providers reported that 3.6% of children in any type of early care and education program have been diagnosed with a disability. Nearly 3% of children in responding child care learning centers, 3.8% in family child care homes, and 6.7% in school-based Georgia's Pre-K programs are reported to have a disability.

Table A.7 displays these percentages for each congressional district and for children in the three types of early care and education programs. Six percent of survey respondents did not respond to this question.

Table A.7. Percentage of Children Diagnosed with Disabilities by Congressional District

Congressional District	Child Care Learning Centers (N=118,884)	Family Child Care Homes (N=6,055)	Schools (N=29,105)	All Programs (N=154,044)
1	3.3%	2.1%	3.7%	3.3%
2	2.4%	5.6%	6.6%	3.6%
3	3.0%	3.5%	5.7%	3.7%
4	1.7%	5.4%	16.8%	5.3%
5	2.3%	5.4%	8.6%	3.1%
6	3.4%	3.1%	10.1%	4.3%
7	2.3%	6.1%	16.7%*	2.4%
8	3.2%	2.3%	4.7%	3.7%
9	4.6%	2.0%	6.1%	4.8%
10	3.5%	3.8%	8.8%	4.8%
11	1.9%	4.9%	8.4%	2.4%
12	3.3%	2.5%	3.8%	3.4%
13	2.3%	2.7%	5.2%	2.5%
14	3.7%	4.5%	4.7%	4.0%
Statewide	2.8%	3.8%	6.7%	3.6%

*This is a relatively large percentage, but is based on a small number of schools; therefore, it likely does not signify the level of need that a sizable percentage may connote.

Children Receiving Services from Babies Can't Wait

Respondents tallied the number of children in their care who were receiving services from Babies Can't Wait (BCW), Georgia's early intervention program for children under the age of three who have disabilities, developmental delays, or chronic health conditions. Babies Can't Wait was established by Part C of the Individuals with Disabilities Education Act (IDEA). Respondents were not asked to detail specific services received or requested from BCW, but only whether children in their early care and education environments received BCW services. On average, 2.2%% of children in responding family child care homes and 0.9% of children in responding child care learning centers had received services from BCW. Data are presented in Table A.8 by type of early care and education environment and by congressional district. Twenty-four percent of programs did not respond to this question.

Table A.8. Percentage of Children Receiving Services from Babies Can't Wait, by Congressional District

Congressional District	Child Care Learning Centers (N=120,323)	Family Child Care Homes (N=6,001)*	All Programs (N=126,324)
1	1.4%	2.4%	1.5%
2	0.6%	4.0%	0.8%
3	0.6%	2.2%	0.6%
4	0.8%	1.4%	0.8%
5	1.1%	2.4%	1.1%
6	0.9%	3.9%	1.0%
7	0.5%	--	0.5%
8	1.0%	2.0%	1.1%
9	0.7%	--	0.7%
10	0.9%	1.8%	0.9%
11	0.7%	2.8%	0.8%
12	1.3%	3.3%	1.4%
13	0.6%	1.2%	0.7%
14	1.1%	2.0%	1.2%
Statewide	0.9%	2.2%	0.9%

*Responses in cells with fewer than five cases are not shown.

Children Who Speak a Language Other Than English at Home

Programs across the early care and education environments were asked how many children speak a language other than English at home. No information was solicited about the home language spoken if not English. Statewide, 6.2% of children in child care learning centers, 3.2% of the children in family child care homes, and 10.5% of children in school-based care spoke a language at home other than English. Thus, 7% of children in responding child care and education programs across all of Georgia's 14 congressional districts speak a language other than English at home. Some variation exists across congressional districts; in particular, programs in the 6th and 7th Congressional Districts report relatively high percentages of children who speak a language other than English at home. Data are displayed in Table A.9 for each congressional district across early care and education environments. Approximately 7% of survey respondents did not answer this question.

Table A.9. Percentage of Children in Early Care and Education Programs Who Speak a Language Other Than English at Home, by Congressional District

Congressional District	Child Care Learning Centers (N=118,967)	Family Child Care Homes (N=5,901)*	Schools (N=29,105)	All Programs (N=153,973)
1	3.8%	4.4%	6.3%	4.4%
2	1.3%	0.9%	5.7%	2.4%
3	1.3%	2.6%	4.5%	2.1%
4	9.1%	3.7%	13.3%	9.7%
5	7.2%	2.0%	13.0%	7.7%
6	16.1%	12.0%	27.0%	17.5%
7	13.0%	9.6%	21.4%	13.0%
8	2.2%	1.0%	7.7%	4.1%
9	6.6%	--	24.2%	9.1%
10	4.2%	5.5%	5.1%	4.5%
11	6.9%	--	8.4%	6.9%
12	3.2%	2.5%	7.1%	4.2%
13	6.1%	0.9%	11.0%	6.2%
14	2.0%	--	20.5%	7.4%
Statewide	6.2%	3.2%	10.5%	6.9%

*Responses in cells with fewer than five cases are not shown.
Note: Data from 7% of all cases have missing values.

Racial Composition of Children in Early Care and Education Environments

Programs were asked to provide a breakdown of the number of Non-Hispanic White, Non-Hispanic Black, Non-Hispanic Asian, Hispanic, and multiracial children enrolled. Participants could also describe the children's ethnicity and race in an "Other" category if another description was more appropriate.

Across the state, in child care learning centers, 40.5% of children whose race/ethnicity was indicated were identified as Non-Hispanic White; 38.8% as Non-Hispanic Black; 3.5% as Non-Hispanic Asian; 6.9% as Spanish, Latino, or Hispanic; 4.6% as multiracial; and 1.6% as some other race/ethnicity (Table A.10). In family child care homes, 39.9% of children whose race/ethnicity was indicated were identified as Non-Hispanic White; 51.7% as Non-Hispanic Black; 1.7% as Non-Hispanic Asian; 4.3% as Spanish, Latino, or Hispanic; 6.9% as multiracial; and 2.6% as some other race or ethnicity (Table A.11). Within school-based care, 43.2% of children whose race/ethnicity was indicated were identified as Non-Hispanic White; 40.5% as Non-Hispanic Black; 2.3% as Non-Hispanic Asian; 14.6% as Spanish, Latino, or Hispanic; 3.1% as multiracial; and 1.1% as some other race/ethnicity (Table A.12).

Although Non-Hispanic White children make up 44.7% of Georgia's population of children age 13 and younger, according to the US Census, they account for approximately 40% to 43% of the children served by the state's early care and education industry. According to the respondents, Non-Hispanic White children compose 40.5% of children at child care learning centers and 39.9% of children at family child care homes. They are, thus, slightly underrepresented in these two types of care and nearly proportionally represented in school-based Georgia's Pre-K programs, where they compose 43.2% of the children. Non-Hispanic Black children compose 33.1% of Georgia's population of children age 13 and younger, according to the US Census, but they account for 38.8% to 51.7% of the children served by the state's early care and education industry (US Census Bureau, Population Division 2015). Thus, Non-Hispanic Black children are overrepresented in each type of care because, according to respondents, Non-Hispanic Black children account for 38.8% of children in child care learning centers, 51.7% of children in family child care homes, and 40.5% of children in school-based Georgia's Pre-K programs.

Tables A.10, A.11, and A.12 display the racial/ethnic breakdown of children enrolled in early care and education programs across Georgia by congressional district for child care learning centers, family child care homes, and public school–based Georgia's Pre-K programs, respectively. The percentages do not sum to exactly 100% in each row because some respondents did not complete the question for all racial and ethnic groups. Between 32% and 60% of survey respondents did not provide a response to one or more of the questions about race and ethnicity. Nonresponse was higher among the categories of Non-Hispanic Asian; Spanish, Latino, or Hispanic; multiracial; and other race or ethnicity. Because programs may not keep records on the race or ethnicity of the children in their care, some respondents may have left a category blank because they were unsure of the number of children in each racial or ethnic group. Alternatively, some may have left a category blank because they were not caring for children of any of the listed racial or ethnic groups when completing the survey.

Table A.10. Percentage Distribution of Children Enrolled in Child Care Learning Centers by Racial/Ethnic Group, by Congressional District

Congressional District	Non-Hispanic White (N=45,716)	Non-Hispanic Black (N=43,771)	Non-Hispanic Asian (N=3,898)	Spanish, Latino, Hispanic (N=7,805)	Multiracial (N=5,200)	Other (N=1,789)
1	46.5%	35.7%	2.1%	4.3%	4.8%	1.6%
2	28.1%	58.5%	0.5%	2.8%	3.7%	1.1%
3	41.5%	37.7%	2.9%	4.6%	5.4%	1.2%
4	19.2%	57.6%	5.1%	6.4%	4.3%	4.5%
5	22.6%	56.3%	4.3%	6.6%	2.8%	0.5%
6	45.9%	19.7%	10.5%	10.8%	5.6%	4.7%
7	37.5%	28.2%	7.8%	15.1%	6.0%	2.7%
8	49.0%	36.0%	1.2%	3.1%	3.8%	0.3%
9	74.0%	8.6%	0.7%	9.1%	4.0%	0.1%
10	50.5%	36.4%	2.3%	4.5%	5.1%	0.5%
11	54.9%	21.5%	2.0%	10.4%	5.3%	0.9%
12	35.9%	49.0%	1.9%	3.1%	4.7%	0.7%
13	16.4%	66.3%	3.7%	6.1%	4.4%	2.5%
14	67.4%	16.6%	0.8%	6.0%	5.0%	0.2%
Statewide	40.5%	38.8%	3.5%	6.9%	4.6%	1.6%

Table A.11. Percentage Distribution of Children Enrolled in Family Child Care Homes by Racial/Ethnic Group, by Congressional District

Congressional District	Non-Hispanic White (N=2,157)	Non-Hispanic Black (N=2,798)	Non-Hispanic Asian (N=93)	Spanish, Latino, Hispanic (N=234)	Multiracial (N=372)	Other (N=143)
1	29.2%	57.8%	1.4%	2.8%	6.7%	3.9%
2	32.2%	63.4%	1.0%	1.0%	4.6%	3.2%
3	50.2%	45.4%	--	54.1%	1.9%	0.0%
4	17.7%	84.6%	0.9%	1.2%	7.8%	8.7%
5	9.4%	85.8%	--	--	6.9%	1.4%
6	51.5%	26.6%	5.5%	5.5%	4.6%	3.4%
7	39.4%	36.4%	3.5%	12.5%	13.7%	3.5%
8	51.9%	41.3%	--	--	6.0%	--
9	86.5%	18.5%	2.3%	--	5.8%	--
10	61.9%	39.0%	2.3%	--	4.2%	--
11	64.0%	26.8%	4.2%	1.9%	9.6%	1.9%
12	53.1%	35.6%	0.0%	--	5.8%	3.7%
13	13.0%	73.9%	3.2%	1.9%	8.9%	--
14	70.4%	14.6%	0.0%	2.3%	7.0%	0.0%
Statewide	39.9%	51.7%	1.7%	4.3%	6.9%	2.6%

Note: Responses in cells with fewer than five cases are not shown.

Table A.12. Percentage Distribution of Children Enrolled in Public Schools Offering Georgia's Pre-K Program by Racial/Ethnic Group, by Congressional District

Congressional District	Non-Hispanic White (N=11,427)	Non-Hispanic Black (N=11,152)	Non-Hispanic Asian (N=647)	Spanish, Latino, Hispanic (N=3,931)	Multiracial (N=39)	Other (N=160)
1	53.8%	37.4%	1.8%	9.0%	4.2%	1.1%
2	34.3%	54.7%	0.9%	8.4%	2.1%	0.4%
3	56.3%	27.7%	2.2%	9.3%	5.2%	1.2%
4	21.4%	57.6%	4.7%	17.7%	3.0%	2.9%
5	12.1%	53.4%	5.9%	24.8%	1.8%	1.4%
6	13.7%	55.2%	6.8%	22.6%	1.4%	2.6%
7	33.3%	21.4%	11.9%	31.0%	--	0.0%
8	48.8%	49.5%	1.1%	10.8%	3.5%	0.2%
9	58.5%	10.0%	1.7%	28.7%	2.0%	0.4%
10	50.8%	39.1%	2.5%	6.1%	2.9%	--
11	65.2%	12.5%	1.0%	16.1%	3.6%	1.5%
12	36.4%	55.7%	1.5%	10.6%	3.1%	2.1%
13	11.4%	48.7%	6.5%	30.2%	1.6%	0.5%
14	64.5%	5.2%	0.7%	25.0%	2.9%	0.7%
Statewide	43.2%	40.5%	2.3%	14.6%	3.1%	1.1%

Note: Responses in cells with fewer than five cases are not shown.

Racial and ethnic diversity in early care and education programs varies across the state and by provider type. The percentages of Non-Hispanic White children in care range from 9.4% in family child care homes in the 5th Congressional District to 86.5% in family child care homes in the 9th District; Non-Hispanic Black children compose 14.6% of the children in care in the 14th District, and 84.6% and 85.8% in the 4th and 5th Congressional Districts, respectively. The percentages of Non-Hispanic Black children in child care learning centers range from 8.6% in the 9th Congressional District to 66.3% in the 13th District, while the percentages of Non-Hispanic White children in centers range from 16.4% in the 13th District to 74.0% in the 9th District.

Ranges are somewhat narrower among children in Georgia's Pre-K programs in public schools. The 13th Congressional District has the lowest percentage of Non-Hispanic White children (11.4%), and the 11th District the highest at 65.2%. Non-Hispanic Black children compose 5.2% of the children attending public school–based Georgia's Pre-K in the 14th District; they compose approximately 53% to 58% of such children in Districts 2, 4, 5, 6, and 12.

PROFILES OF EARLY CARE AND EDUCATION PROGRAMS IN GEORGIA

The Early Care and Education Economic Impact Survey provided data that fill gaps in knowledge about the business operations of early care and education programs in the state not available from any existing source. This section describes aspects of the supply of and demand for early care and education in Georgia. The section starts by detailing the types of early care and education programs offered and related enrollment as well as when care is available. A comparison of licensed capacity and enrollment sheds light on the availability of early care and education in the state. Revenues and sources of revenues likewise reveal some factors that influence the demand for and supply of early care and education in Georgia.

Type of Enrollment in Early Care and Education Environments

Programs were asked to furnish information on the enrollment of children by the type of care offered in their early care and education settings. Programs supplied summary information about the number of children in full-time, part-time, before-school, after-school, wrap-around (i.e., before and after school), formal sick care (i.e., care when the child is ill and out of school), weekend, evening, and overnight early care and education programs. Tables A.13 and A.14 display these data by congressional district for child care learning centers, and Tables A.15 and A.16 show this information for family child care homes. Note that not all programs provide each type of care, but the percentages shown in these tables represent the children receiving a specified type of care and overall enrollment within programs that offer that type of care. Thus, percentages within each type of care are independent and will not sum to 100% across types of care.

Tables A.13 and A.14 show the percentages of children attending each type of care offered by reporting child care learning centers. The data in these tables come from two separate questions (Q5 and Q8) on the child care learning center questionnaire (see Appendix C for a copy of the survey). Providers gave the total number of children attending their center in Q5. Then, in Q8, they gave the number of children in each type of care. These were summed across all responding centers in each congressional district and statewide. To determine the percentage of children in each type of care, the summed responses to Q8 were divided by the summed responses to Q5 for centers. When a program did not report enrollment for a specified type of care, its responses to both Q8 and Q5 were omitted from analysis. Tables A.13 and A.14 provide the percentages of children in each type of care along with the numbers used to derive these percentages. For example, child care learning centers in Congressional District 1 (CD1) reported that 5,508 children attend their centers full-time (Table A.13). A total of 6,823 children attend the centers in CD1 that reported the number of children in full-time care. Therefore, 80.7% of all children attending reporting centers in CD1 attend full-time. For the state as a whole, 81.1% of the children attending reporting centers attend full-time.

Likewise, in CD1, 4,637 children attend the centers that reported at least one child attending part-time. Of these 4,637 children, 598 or 12.9% attend part-time (Table A.13). Statewide, of the 63,624 children in care at the centers reporting at least one part-time child, 8,168 or 12.8% attend these centers part-time. Fewer children attend the centers reporting the number of children who attend on weekends and at other nonstandard times. Table A.14 indicates that statewide, the centers reporting the number of children attending in the evening offer care to a total of 12,031 children. Of these, 8.8% (N=1,058) are cared for in the evening.

Table A.13. Percentage and Number of Children by Length of Day Options for Children in Child Care Learning Centers, by Congressional District

Cong Dist	Full Time		Part Time		Before School		After School	
	Number Full Time/ Total Number	% Full Time	Number Part Time/ Total Number	% Part Time	Number Before-School/ Total Number	% Before School	Number After School/ Total Number	% After school
1	5,508/6,823	80.7	598/4,637	12.9	314/3,697	8.5	1,605/4,603	34.9
2	5,828/7,571	77.0	390/3,937	9.9	171/2,840	6.0	829/4,110	20.2
3	5,763/7,000	82.3	395/3,610	10.9	95/3,138	3.0	891/4,051	22.0
4	5,127/6,457	79.4	499/4,330	11.5	177/4,358	4.1	1,303/5,575	23.4
5	7,774/8,592	90.5	521/4,761	10.9	402/4,226	9.5	1,662/5,391	30.8
6	4,628/5,621	82.3	585/4,192	14.0	102/1,658	6.2	1,201/3,894	30.8
7	7,670/10,454	73.4	901/8,691	10.4	286/8,311	3.4	1,643/9,066	18.1
8	5,075/6,337	80.1	382/3,472	11.0	146/3,007	4.9	1,041/3,911	26.6
9	4,642/5,704	81.4	450/3,453	13.0	57/2378	2.4	653/3,001	21.8
10	3,734/4,421	84.5	538/2,599	20.7	90/1,386	6.5	680/2,594	26.2
11	6,405/7,995	80.1	1,234/6,685	18.5	97/3,791	2.6	743/5,735	13.0
12	5,070/5,976	84.8	306/3,163	9.7	97/2,047	4.7	382/2,695	14.2
13	6,843/8,591	79.7	733/6,453	11.4	134/5,084	2.6	1,412/6,136	23.0
14	4,369/5,185	84.3	636/3,641	17.5	73/1,978	3.7	857/3,405	25.2
State-wide	78,436/96,727	81.1	8,168/63,624	12.8	2,241/47,899	4.7	14,902/64,167	23.2

Table A.14. Percentage and Number of Children by Nonstandard Attendance Schedule Options for Children in Child Care Learning Centers, by Congressional District

Cong Dist	Wrap-Around Care		Weekends		Evenings		Overnight	
	Number Wrap-Around/ Total Number	Percent Wrap-Around	Number Weekend/ Total Number	Percent Weekend	Number Evening/ Total Number	Percent Evenings	Number Overnight/ Total Number	Percent Overnight
1	2,078/5,520	37.6	23/741	3.1	112/931	12.0	--	--
2	1,333/5,247	25.4	13/858	1.5	210/1,509	13.9	13/870	1.5
3	1,352/6,037	22.4	20/635	3.1	67/858	7.8	6/635	0.9
4	1,028/5,306	19.4	0/677	0.0	53/828	6.4	5/748	0.7
5	985/4,810	20.5	38/1,342	2.8	113/1,549	7.3	6/1,443	0.4
6	362/3,271	11.1	0/333	0.0	90/327	27.5	0/333	0.0
7	1,322/9,355	14.1	0/295	0.0	0/295	0.0	0/295	0.0
8	975/4,691	20.8	0/309	0.0	130/665	19.5	0/309	0.0
9	496/2,785	17.8	15/465	3.2	--	--	0/348	0.0
10	827/2,999	27.6	--	--	--	--	0/302	0.0
11	795/5,045	15.8	205/896	22.9	70/817	8.6	21/732	2.9
12	1,236/4,106	30.1	0/752	0.0	64/1,148	5.6	--	--
13	1,607/7,894	20.4	26/1,019	2.6	77/1,491	5.2	4/1,019	0.4
14	516/3,130	16.5	0/710	0.0	69/840	8.2	0/742	0.0
State-wide	14,912/70,196	21.2	342/9,362	3.7	1,058/12,031	8.8	59/9,122	0.6

Note: Responses in cells with fewer than four cases are not shown.

Tables A.15 and A.16 show the percentages of children attending each type of child care offered by reporting family child care homes. The data in these tables come from two separate questions (Q9 and Q12) on the family child care home questionnaire (see Appendix C for a copy of the survey). Family child care home operators gave the total number of children attending their home in Q9. Then, in Q12, they gave the number of children in each type of care. These were summed across all responding family child care homes in each congressional district and statewide. To determine the percentage of children in each type of care, the summed responses to Q12 were divided by the summed responses to Q9 for family child care homes. Again, when a program did not report enrollment for a specified type of care, its responses to both Q12 and Q9 were omitted from analysis.

Tables A.15 and A.16 provide the percentages of children in each type of care along with the numbers used to derive these percentages. For example, family child care home owners in Congressional District 4 (CD4) reported that 525 children attend their centers full-time (Table A.15). A total of 628 children attend the family child care homes in CD4 that reported the number of children in full-time care. Therefore, 83.6% of all children enrolled in reporting family child care homes in CD4 attend full-time. For the state as a whole, 85.3% of the children attending reporting family child care homes attend full-time.

Likewise, in CD4, 305 children attend the homes that reported caring for at least one child after school only. Nearly 31% (N=94) of these children attend part-time (Table A.15). Statewide, of the 2,504 children who attend family child care homes reporting at least one child attending after school only, 692, or 27.6%, stay at these homes after school only. Table A.16 indicates that statewide, the homes reporting that they offer evening hours care for a total of 1,094 children. They care for 31.8% (N=348) of these children in the evening.

Table A.15. Percentage and Number of Children by Length of Day Options for Children in Family Child Care Homes, by Congressional District

Cong District	Full Time		Part Time		Before School		After School	
	Number Full Time/ Total Number	Percent Full Time	Number Part Time/ Total Number	Percent Part Time	Number Before School/ Total Number	Percent Before School	Number After School/ Total Number	Percent After School
1	608/650	93.5	59/254	23.2	29/174	16.7	63/252	25.0
2	449/520	86.3	67/204	32.8	19/121	15.7	81/266	30.5
3	186/207	89.9	19/104	18.3	15/72	20.8	24/104	23.1
4	525/628	83.6	73/264	27.7	37/194	19.1	94/305	30.8
5	284/318	89.3	41/167	24.6	32/148	21.6	55/170	32.4
6	191/247	77.3	41/134	30.6	--	--	21/79	26.6
7	263/315	83.5	42/175	24.0	12/96	12.5	27/114	23.7
8	501/608	82.4	66/241	27.4	12/122	9.8	62/247	25.1
9	259/289	89.6	65/161	40.4	3/27	11.1	39/158	24.7
10	287/347	82.7	69/205	33.7	38/106	35.8	54/145	37.2
11	233/266	87.6	29/136	21.3	2/66	3.0	17/98	17.3
12	321/378	84.9	36/160	22.5	16/88	18.2	44/168	26.2
13	506/603	83.9	76/319	23.8	22/159	13.8	87/290	30.0
14	167/227	73.6	41/140	29.3	4/45	8.9	24/108	22.2
Statewide	4,780/5,603	85.3	724/2,664	27.2	244/1,439	17.0	692/2,504	27.6

Note: Responses in cells with fewer than four cases are not shown.

Table A.16. Percentage and Number of Children by Nonstandard Attendance Schedule Options for Children in Family Child Care Homes, by Congressional District

Congressional District	Wrap-Around Care		Weekends		Evenings		Overnight	
	Number Wrap-Around/ Total Number	Percent Wrap-Around	Number Weekend/ Total Number	Percent Weekend	Number Evening/ Total Number	Percent Evenings	Number Overnight/ Total Number	Percent Overnight
1	82/304	27.0	18/68	26.5	37/130	28.5	8/100	8.0
2	80/196	40.8	15/77	19.5	80/163	49.1	12/73	16.4
3	37/109	33.9	--	--	14/57	24.6	0/24	0.0
4	115/304	37.8	13/71	18.3	26/97	26.8	8/75	10.7
5	50/150	33.3	26/110	23.6	28/106	26.4	10/74	13.5
6	7/36	19.4	0/12	0.0	0/12	0.0	0/12	0.0
7	34/130	26.2	16/43	37.2	9/42	21.4	6/34	17.6
8	57/213	26.8	9/91	9.9	43/119	36.1	--	--
9	19/48	39.6	--	--	6/29	20.7	--	--
10	68/163	41.7	9/49	18.4	37/78	47.4	4/43	9.3
11	15/80	18.8	7/39	17.9	11/40	27.5	4/31	12.9
12	57/157	36.3	12/37	32.4	16/43	37.2	6/34	17.6
13	56/229	24.5	27/91	29.7	33/121	27.3	9/77	11.7
14	16/91	17.6	15/49	30.6	8/57	14.0	0/35	0.0
Statewide	693/2,210	31.4	171/798	21.4	348/1,094	31.8	72/715	10.1

Note: Responses in cells with fewer than four cases are not shown.

In child care learning centers and family child care homes, more than 80% of children attend full-time (81.1% of children in centers and 85.3% of children in family child care homes) (Tables A.13 and A.15). The types of care used by the next largest groups of children vary by program type. For centers, the next most used types of care are after-school-only (23.2%) and wrap-around (21.2%) care. While large percentages of children in family child care homes attend part-time (27.2%) or receive after-school (27.6%) care, even larger groups utilize evening (31.8%) or wrap-around (31.4%) care.[2]

Family child care homes have greater percentages of children in part-time and before-school care across all congressional districts than do child care learning centers. The smallest percentage of children are in sick care. Centers report having no children in sick care, but family

[2] The questionnaire offered centers and family child care homes the response options just as they are arrayed in Tables A.13–A.16. Part-time care may encompass any of the subsequently listed types of care. Therefore, a program may have marked part-time and then realized that after-school care was also an option. Therefore, the percentages in Tables A.13–A.16 do not sum to 100% but convey the information that programs provided as accurately as possible.

child care homes report having an average of 5.3% of children in such care (not displayed due to small numbers).

Approximately 21% of survey respondents did not answer the question about full-time care, 57% about part-time care, 69% about before-school care, 50.4% about after-school care, 59% about wrap-around care, 98% about formal sick care, 80% about weekend care, 47% about evening care, and 90% about overnight care.

Months of Program Operation

Child care learning centers and family child care homes noted the number of months per year that they provide early care and education at their respective facilities. Respondents chose one of four options: 12 months, 10–11 months, nine months, and three months of care (summer-only care). More than 80% of centers and 95% of family child care homes operate on a 12-month basis. Georgia's Pre-K programs based in public school systems are generally available for nine months of the year, as are 16.8% of centers and 3.4% of homes (Table A.17). Most of the remaining child care learning centers and family child care homes operate 10 to 11 months of the year.

Table A.17. Months of Program Operations, Child Care Learning Centers and Family Child Care Homes

	12 Months a Year		10-11 Months a Year		9 Months a Year		3 Months a Year	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Child Care Learning Centers	1,176	80.5	38	2.6	245	16.8	--	--
Family Child Care Homes	1,091	95.1	13	1.1	39	3.4	--	--
Statewide	2,267	87	51	2	284	10.9	5	0.2

Note: Responses in cells with fewer than five cases are not shown.

Days and Hours of Program Operation

Child care learning centers and family child care homes were polled about their hours of operation. Programs could indicate service hours Monday through Friday, Saturday, Sunday, holidays, and evenings (after 5:00 PM). Table A.18 shows that nearly all child care learning centers and family child care homes operate Monday through Friday. Small percentages (14.1% of centers and 21.4% of family child care homes) are also open at least one other time during the week or on holidays.[3] Thus, family child care homes are about 1.5 times more likely than centers to provide care for children on Saturdays, Sundays, holidays, or in the evening.

[3] These percentages were calculated by aggregating the data indicating which providers offer each type of care.

Table A.18. Days of Early Care and Education Program Operations

Program Type	Monday-Friday Percent	Saturday Percent	Sunday Percent	Holidays Percent	Evenings Percent	Sat, Sun, Holidays, or Evenings Percent
Child Care Learning Centers	99.6 (N=1,472)	2.8 (N=35)	1.1 (N=14)	10.2 (N=128)	7.7 (N=96)	14.1 (N=207)
Family Child Care Homes	99.8 (N=1,166)	11.0 (N=95)	6.9 (N=59)	13.0 (N=113)	20.6 (N=171)	21.4 (N=250)
Statewide	99.7 (N=2,638)	6.1 (N=130)	3.4 (N=73)	11.4 (N=241)	12.9 (N=267)	17.3 (N=457)

Note: These categories are not mutually exclusive: A provider could indicate more than one category of care.

Table A.19 presents the mean (average) number of hours that programs offer early care and education Monday to Friday, Saturdays, Sundays, holidays, and in the evening by program type. Approximately 81% of children in child care learning centers and 85% of children in family child care homes are in full-time care. The percentages of children who attend on weekends, in the evening, or overnight are greater in family child care homes than in child care learning centers.

Table A.19. Mean Hours of Early Care and Education Program Operations

	Monday-Friday	Saturday	Sunday	Holidays	Evenings
Child Care Learning Centers	10.8 (N=1,445)	11.7 (N=26)	12.8 (N=10)	12.1 (N=97)	9.3 (N=63)
Family Child Care Homes	11.4 (N=1,153)	12.1 (N=73)	13.8 (N=45)	12.3 (N=83)	9.1 (N=125)
Statewide	11.1 (N=2,598)	12.0 (N=99)	13.6 (N=55)	12.2 (N=180)	9.2 (N=188)

Transportation

Early care and education programs were surveyed about whether they provide transportation services to children and families. The programs in Georgia that offer transportation services for children (e.g., Head Start programs, after-school care programs) operate such services under very stringent regulations.

Of programs that indicated that they transport children (42.5%), transportation services are more likely to be provided by child care learning centers and schools than by family child care homes. Nearly all (95.7%) responding schools offering Georgia's Pre-K and 46.2% of centers provide daily transportation, whereas 9.5% of family child care homes do so. There is some variation across congressional districts: Programs in rural districts are less likely to provide transportation. More specifically, programs in Districts 1 and 9 are less likely to offer transportation services on average than are other districts. Table A.20 summarizes the provision of transportation services by type of program and congressional district. Approximately 3% of survey respondents did not answer this item.

Table A.20. Daily Transportation Services by Program Type and Congressional District

Congressional District	Child Care Learning Centers (N=670)	Family Child Care Homes (N=107)	Schools (N=573)	All Programs (N=1,350)
1	24.3%	9.7%	100.0%	32.2%
2	49.2%	9.2%	100.0%	42.3%
3	46.5%	12.2%	100.0%	57.3%
4	69.0%	14.4%	100.0%	51.8%
5	38.0%	18.3%	97.1%	40.5%
6	41.8%	--	100.0%	42.7%
7	67.0%	8.7%	--	44.3%
8	48.6%	9.2%	98.4%	44.3%
9	30.0%	--	77.8%	29.1%
10	46.9%	0.0%	97.2%	40.3%
11	47.9%	--	--	29.9%
12	42.9%	--	100.0%	43.7%
13	70.5%	16.0%	100.0%	46.1%
14	34.8%		94.7%	47.8%
Statewide	46.2%	9.5%	95.7%	42.5%

Note: Responses in cells with fewer than five cases are not shown, but the mean accounts for the unseen cases. Therefore, in the case of District 11, for example, the mean is calculated using percentages not shown.

Licensed Capacity and Current Enrollment

All programs were asked to provide their current enrollment. Child care learning centers were additionally asked to list their licensed capacity. Family child care homes were asked only for current enrollment because the maximum licensed capacity for these providers in Georgia is six children. State regulations do not allow family child care homes to receive payment for more than six children. The capacity of schools is indeterminate because schools are not licensed and capacity is thus not estimated.

Table A.21 displays the enrollments in child care learning centers, family child care homes, and schools by congressional district, and Table A.22 summarizes enrollment and capacity, where possible. Tables A.23 and A.24 show the distribution of the average number of enrolled children by child's age and congressional district for child care learning centers and family child care homes, respectively. Only 3.2% of survey respondents did not respond to these questions.

The average licensed capacity reported by child care learning centers is 117 children; the median is 102 (half have capacity for more than 102 children and half have less capacity) (Table A.22). The average number currently enrolled in centers is 87 children; the median enrollment is 77.

Note that the difference between the licensed capacity in the child care learning centers and the enrollment does not necessarily indicate excess supply in Georgia. Licensed capacity in child care learning centers is determined by square footage, and some facilities may not be designed to hold their allowable number of children due to room configurations. The difference between capacity and enrollment also may stem from some programs choosing to care for fewer children than are legally permitted in the facility. For example, accreditation standards require lower enrollments than the licensed capacity, so some programs voluntarily choose to limit enrollments to meet the standards. In addition, class sizes may be smaller than space would allow in order to better accommodate the needs of younger children, especially infants.

Table A.21. Mean and Median Current Enrollments in Early Care and Education Programs, by Congressional District

Cong District	Child Care Learning Centers (N=1,474)		Family Child Care Homes (N=1,136)		Schools (N=599)	
	Mean	Median	Mean	Median	Mean	Median
1	72.9	56.0	5.7	6.0	52.5	44.0
2	70.4	63.0	5.5	6.0	65.3	47.1
3	86.5	77.0	5.8	6.0	41.2	43.5
4	95.3	88.5	5.4	5.5	35.8	25.3
5	85.1	71.0	4.8	5.0	38.0	32.5
6	101.1	93.0	5.3	6.0	33.6	25.3
7	129.8	129.5	5.5	6.0	42.0	42.0
8	72.4	58.0	6.0	6.0	74.8	44.4
9	80.8	68.0	5.5	6.0	49.1	43.0
10	91.1	75.0	6.1	6.0	53.2	44.0
11	108.7	102.5	5.0	6.0	34.4	22.0
12	62.9	54.0	5.2	6.0	47.0	40.5
13	107.3	110.0	5.3	5.0	32.8	22.4
14	79.6	74.0	6.6	6.0	53.1	44.0
Statewide	87.3	77.0	5.5	6.0	48.6	43.4

Table A.22. Early Care and Education Program Enrollment and Capacity in Georgia

	Enrollment		Capacity	
	Mean	Median	Mean	Median
Child Care Learning Centers	87.3	77	116.9	102
Family Child Care Homes	5.5	6	6.0	6
Number of Pre-K Classes per School	Number of Schools	Percent		
1	191	32.5		
2	290	49.3		
3	67	11.4		
4	18	3.1		
5	5	0.9		
6 to 13	17	2.9		
Total	588	100		

Table A.23. Average Number of Enrolled Children in Child Care Learning Centers, by Child's Age and Congressional District

Congressional District	<6 Months (N=597)	6-12 Months (N=681)	12-18 Months (N=737)	18-24 Months (N=731)	2 Years (N=832)	3 Years (N=931)	4 Years (N=926)	5 Years (N=662)	6-13 Years (N=689)
1	4.5	5.5	5.5	7.5	11.5	15.0	17.9	11.6	40.2
2	4.9	5.7	5.7	7.0	11.8	17.7	20.8	8.9	21.6
3	5.0	4.8	7.6	7.4	14.4	20.6	27.3	12.0	27.9
4	4.1	4.2	5.6	6.0	11.2	17.9	40.7	10.3	24.1
5	3.6	5.5	8.0	9.7	14.7	20.6	36.5	10.3	28.1
6	4.7	6.6	8.1	8.6	15.7	18.6	30.9	11.5	30.3
7	6.1	5.0	7.6	7.3	15.4	22.0	48.4	15.4	35.7
8	3.8	4.8	5.8	7.5	12.2	15.3	21.7	7.7	20.4
9	3.8	4.9	6.4	6.9	11.8	21.6	37.7	8.8	20.4
10	4.5	5.0	5.9	7.6	13.6	19.3	28.2	8.7	36.3
11	4.4	5.3	7.0	7.8	14.3	18.6	39.9	11.8	17.0
12	5.4	4.4	6.6	6.5	12.0	19.2	17.8	8.1	18.9
13	3.5	5.4	6.7	6.5	11.8	17.8	37.5	12.9	29.6
14	3.9	4.2	5.3	6.0	12.7	18.2	29.1	11.3	29.0
Statewide	4.5	5.1	6.6	7.3	13.1	18.7	30.6	10.8	27.3

Table A.24. Average Number of Enrolled Children in Family Child Care Homes, by Child's Age and Congressional District

Congressional District	<6 Months (N=259)	6-12 Months (N=385)	12-18 Months (N=473)	18-24 Months (N=431)	2 Years (N=685)	3 Years (N=570)	4 Years (N=283)	5 Years (N=188)	6-13 Years (N=340)
1	1.2	1.3	1.6	1.4	2.0	1.8	1.5	1.4	2.2
2	1.1	1.3	1.4	1.3	1.9	1.6	1.4	1.5	2.5
3	1.1	1.3	1.7	1.5	1.8	1.6	1.4	1.6	2.2
4	1.1	1.2	1.4	1.6	1.8	1.6	1.6	1.6	2.4
5	1.7	1.6	1.7	1.6	2.0	1.8	1.7	1.1	2.5
6	1.3	1.4	1.7	1.5	1.8	1.6	1.3	--	2.0
7	1.2	1.2	1.2	1.5	1.8	1.6	1.7	1.4	2.3
8	1.1	1.4	1.4	1.6	1.9	2.1	1.6	1.5	2.1
9	1.1	1.3	1.5	1.1	1.9	1.9	1.3	1.2	1.9
10	1.2	1.3	1.5	1.4	2.0	1.7	1.4	1.5	2.5
11	1.1	1.4	1.6	1.5	1.7	1.7	1.3	--	1.3
12	1.2	1.3	1.4	1.4	1.8	1.6	1.4	1.4	1.8
13	1.2	1.2	1.5	1.4	1.9	1.7	1.2	1.5	2.3
14	1.5	1.3	1.4	1.2	1.9	2.1	1.7	1.6	2.3
Statewide	1.2	1.3	1.5	1.4	1.9	1.8	1.4	1.4	2.2

Note: Responses in cells with fewer than five cases are not shown.

The largest number of children in care in child care learning centers are age four (averaging 30.6 per center), followed by an average of 27 children ages six to 13 (Table A.23). Of children ages five and younger, the second-largest age group in child care learning centers is three year olds (averaging 19 per center). Centers serve an average of nine to 10 children birth to one year, 14 age one, 13 age two, and 11 children age five years. Within each age group, these enrollments are similar across congressional districts, except for children age five, who average as few as eight in centers in the 8th and 12th Districts and as many as 15 in the 7th District.

Family child care homes report serving an average of six children and a median of six children statewide (Table A.22). Although state regulations do not allow family child care homes to receive payment for more than six children, providers that report more than six children are not necessarily violating the ratio guidelines; providers may care for children for whom they do not receive payment, such as the children of relatives or friends. Providers were asked not to include these children in their enrollments, but some may have done so. Moreover, providers may offer part-time care options for families, with multiple children sharing a single child care slot.

Family child care home enrollment data indicate that they are more likely to care for children from birth through age three than children ages four or five (Table A.24). Because of the maximum capacity of six children per home, this does not mean that the majority of children birth through age three are served in family child care homes. Rather, these children makes up the bulk of family child care homes' clientele. These homes also care for children of school age. Reported enrollments in family child care homes are similar across congressional districts within each age group.

Table A.22 indicates that the schools offer an average of two classes of Georgia's Pre-K. Table A.22 shows that 32.5% of the responding schools offer one class of Georgia's Pre-K, 49.3% two classes, 11.4% three classes, and 6.9% offer four or more such classes.

Waiting Lists

Programs were asked to supply the number of children that were on a waiting list for early care and education services. Table A.25 indicates the number of children on waiting lists along with the minimum and maximum wait list numbers for each congressional district. A larger proportion of child care learning centers than family child care homes maintain waiting lists—66.7% versus 60.3%, respectively. More than 40% of centers' (40.9%) and family child care homes' (46.9%) lists were empty at the time of the survey. The mean number of children on waiting lists of the remaining programs statewide was 12.4 for child care learning centers and 1.6 for family child care homes. For centers, lists vary in length from as few as four children on average in District 9 to as many as 41 in District 5. For family child care homes, the average number of children on each home's list is one for half the districts and two for five of the remaining seven districts. Family child care homes in Districts 6 and 10 have an average of three children waiting for an opening. The medians tell this story differently—half of the centers' lists contain three names or fewer and half contain more, suggesting that a few programs may have exceptionally large waiting lists.

Waiting lists are imperfect indicators of excess demand because many parents put their children on multiple waiting lists. Additionally, a program might have a waiting list for, say, infants but several available slots for other age groups.

Table A.25. Percentage of Child Care Learning Centers and Family Child Care Homes with a Waiting List and Numbers of Wait-Listed Children, by Congressional District

Cong	Child Care Learning Centers (N=951)					Family Child Care Homes (N=670)				
District	Percent	Mean	Median	Min	Max	Percent	Mean	Median	Min	Max
1	72.6	10.3	3.0	0	132	59.7	1.3	0.0	0	8
2	64.8	9.5	4.0	0	75	57.4	1.4	1.0	0	8
3	65.0	7.7	3.0	0	59	60.0	1.2	0.5	0	6
4	61.7	9.5	2.0	0	150	58.7	1.3	0.0	0	8
5	57.8	41.0	7.5	0	400	55.7	1.7	1.0	0	11
6	64.9	12.5	3.5	0	100	66.0	2.7	2.0	0	21
7	62.3	6.9	2.0	0	140	63.2	1.4	0.0	0	9
8	63.2	8.8	3.0	0	80	57.9	2.0	2.0	0	8
9	73.9	4.3	2.0	0	30	67.3	1.9	2.0	0	15
10	64.9	18.3	5.0	0	120	64.1	2.9	3.0	0	10
11	66.7	14.1	2.0	0	160	66.1	1.3	0.0	0	7
12	75.2	9.8	3.0	0	77	61.7	1.7	1.0	0	10
13	68.4	11.7	2.0	0	103	55.4	1.2	0.0	0	7
14	73.3	7.6	1.0	0	100	66.7	2.2	2.0	0	6
Statewide	66.7	12.4	3.0	0	400	60.3	1.6	1.0	0	21

Annual Revenues of Georgia's Early Care and Education Programs in 2013

Early care and education programs were asked to report their gross annual revenues (income before taxes and expenses) in 2013 or their most recently completed fiscal or tax year. Columns 2 and 3 of Table A.26 report the median responses per enrolled child for family child care homes and early care learning centers, respectively, by congressional district. The table also reports the median annual revenues per child for four subsets of centers. Because of state and federal requirements and the additional services provided in Early Head Start, Head Start, and the Georgia's Pre-K Program, the state and federal funds allocated to these programs are greater per child than are those for the average early care and education program. For this reason, Columns 4 and 5 of Table A.26 show data for child care learning centers with and without these specialized programs.

Table A.26. Median Annual Revenues per Enrolled Child at Child Care Learning Centers and Family Child Care Homes, by Congressional District

Congressional District	Family Child Care Homes* (N=559)	Child Care Learning Centers*: All Centers (N=747)	With Head Start or GA Pre-K (N=370)	Without Head Start or GA Pre-K (N=377)	For-Profit (N=438)	Not-for-Profit (N=294)
1	$3,167	$4,574	$5,674	$4,108	$4,429	$5,217
2	$3,031	$3,826	$4,814	$3,484	$4,311	$3,609
3	$3,159	$4,852	$5,332	$4,336	$4,234	$8,986
4	$4,333	$4,560	$4,807	$3,928	$4,615	$3,856
5	$4,235	$4,099	$5,000	$3,484	$5,131	$2,216
6	$6,252	$6,751	$6,751	$6,801	$6,498	$11,236
7	$5,198	$5,651	$5,588	$5,714	$5,555	$6,941
8	$3,382	$4,318	$6,157	$3,380	$4,417	$4,175
9	$3,534	$5,116	$5,783	$4,307	$4,714	$5,344
10	$3,981	$4,667	$5,263	$3,330	$4,372	$6,362
11	$6,167	$5,778	$5,599	$6,921	$5,847	$6,155
12	$3,717	$4,274	$5,654	$3,286	$3,948	$5,583
13	$4,336	$4,460	$4,829	$3,364	$4,337	$5,362
14	$3,200	$5,106	$6,118	$3,704	$4,217	$9,074
Statewide	$3,920	$4,734	$5,520	$3,856	$4,643	$5,377

*The difference across regions is statistically significant for both types of providers.

Table A.26 also reports revenues per child for for-profit and not-for-profit child care learning centers. Approximately 62% of responding centers are for-profit businesses. Across Georgia, the median annual gross revenues per child are $3,920 for family child care homes and $4,734 for child care learning centers.

The total annual revenues for programs vary greatly. Table A.27 shows the distributions of revenues for responding child care learning centers, and Table A.28 shows the same for family child care homes. The distributions in Tables A.27 and A.28 are not reported by region because the number of programs reporting revenues/income in a given bracket is small for some regions. The average annual revenues for responding centers are $487,241, with a median of $395,932.

Note that the highest revenue-generating respondents may actually represent multiple sites. Some multisite center programs provided data per site, but others may not have been able to separate their financial information by individual site and did not indicate this on the survey. Many multiple-site programs had this issue and did indicate that they provided one figure to cover all of their sites. When this occurred, the survey team divided this figure by the number of sites and assigned this amount proportionally by enrollment to each of their sites.

Table A.27. Distribution of Annual Revenues Received by Child Care Learning Centers

	Child Care Learning Centers (N=765)
$30,000 or less	6.1%
$30,001 to $100,000	14.2%
$100,001 to $250,000	15.8%
$250,001 to $500,000	22.5%
$500,001 to $1,000,000	29.8%
More than $1,000,000	11.5%
Mean annual revenue	$487,241
Median annual revenue	$395,932

Table A.28 shows the distribution of annual revenues for family child care homes. The average annual revenues for family child care homes are $21,768, with a median of $20,000.

Table A.28. Distribution of Annual Revenues Received by Family Child Care Homes

	Annual Revenues (N=572)
$5,000 or less	9.1%
$5,001 to $12,000	13.6%
$12,001 to $20,000	29.5%
$ 20,001 to $29,000	23.1%
$29,001 to $35,000	11.9%
More than $35,000	12.8%
Mean annual revenues	$21,768
Median annual revenues	$20,000

Respondents were asked to report whether they received revenues from a list of possible revenue sources and, if so, to provide the annual amount of funding. Table A.29 reports for centers, family child care homes, and schools the percentage that each revenue source contributed to the program’s overall budget, given that it received any revenue from that source. Parent fees contributed 52.7% of revenues for those programs that charge fees or tuition. Among child care learning centers that receive funding for Head Start and Early Head Start, this federal program is a major source of financial support, accounting for 15.6% of their revenue. State funding from the Georgia Lottery for Education/Georgia's Pre-K Program contributes a substantial share of centers' revenue (13.2%) statewide. CAPS subsidies contribute 8.8% of centers' revenues; federal nutrition programs, including CACFP, account for 6.3% of centers' revenues statewide.

Nearly all of family child care homes' residual revenues come from public funding through federal nutrition programs (34.8%) and CAPS (10.3%), for those programs that received these types of funding. More than 80% of the schools' funding for their early care and education classrooms comes from the Georgia's Pre-K Program. School systems (6.7%) and federal nutrition programs (5.1%) provide most of the rest of schools' funding.

Table A.29. Percentage of Revenues (if Revenue Type Was Received by Program) by Early Care and Education Program Type

	Child Care Learning Centers[1]	Family Child Care Homes[1]	Schools[2]
Parent fees and tuition	52.7% (N=673)	52.7% (N=348)	--
CAPS subsidies	8.8% (N=512)	10.3% (N=211)	0.3% (N=161)
GA Lottery for Education/Georgia's Pre-K	13.2% (N=351)	--	81.3% (N=515)
Quality Rated mini-grant package or staff bonuses	0.1% (N=101)	0.9% (N=57)	--
Nutrition programs*	6.3% (N=506)	34.8% (N=399)	5.1% (N=144)
Head Start and Early Head Start	15.6% (N=128)	--	--
Other federal funds	0.8% (N=36)	--	1.9% (N=68)
Charitable contributions	1.3% (N=88)	0.4% (N=13)	0.0% (N=3)
Other	1.2% (N=97)	0.8% (N=21)	1.8% (N=7)
School system's contributions to operate GA Pre-K, apart from GA Lottery and other GA Pre-K funding	--	--	6.7% (N=192)
Local funds			2.8% (N=170)
Total	100.0%	100.0%	100.0%

* Child and Adult Care Food Program (CACFP), Summer Food Service Program (SFSP), or USDA National School Lunch Program

[1] These include only the amounts reported by the child care learning centers and family child care homes.

[2] These include the distributions from the Childcare and Parent Services (CAPS) program and the Georgia Lottery for Education/Georgia's Pre-K to the schools participating in the survey.

Comparisons with the 2013 Georgia Child Care Market Rate Survey

In 2013, Care Solutions, Inc. conducted the Georgia Child Care Market Rate Survey for DECAL. This survey is administered periodically to determine variations in market rates among child care programs in different areas of the state in order to meet federal requirements. The results of the survey are used to determine state reimbursement rates to programs that qualify for state subsidies. Similar surveys have been conducted periodically since 1991.

It is useful to compare the results from the Georgia Child Care Market Rate Survey to those of the Economic Impact Survey, where possible, to validate some of the findings. The 2013 Market Rate Survey reports information for the state as a whole, and for selected questions, it reports information for three geographic zones: metro Atlanta counties and Camden County, other urban and suburban counties, and rural counties across the state.[4] For Table A.30, the Economic Impact Study research team used the Market Rate Survey's three geographic zones to break down some of the Early Care and Education Economic Impact Survey data to better understand how the statewide figures were derived. For each of the comparisons listed in Table A.30, the 2013 Market Rate Survey report provided only statewide data. Thus, Table 30 shows the Economic Impact Survey data for the state as a whole and broken down by zone alongside the statewide Market Rate Survey results. Note that the Market Rate Survey's mix of center providers is similar to those in this study except that the Market Rate Survey also includes reports from "informal" providers.

[4] For full zone definitions, see the Georgia Market Rate Survey, "Market Rate Zones," p. 17.

Table A.30. Percentages of Programs Receiving Each Type of Revenue Compared to Equivalent Data from the 2013 Georgia Child Care Market Rate Survey by Geographic Area

	Economic Impact Survey				2013 Market Rate Survey+
	Larger Urban Counties*	Other Urban	Rural	Statewide	Statewide
CAPS subsidies, child care learning centers	68.2% (N=548)	67.7% (N=470)	57.4% (N=216)	66.1% (N=1,234)	63%
CAPS subsidies, family child care homes	33.6% (N=491)	44.5% (N=328)	40.4% (N=198)	38.4% (N=1,017)	41%
Georgia's Pre-K funding, child care learning centers	51.4% (N=551)	32.7% (N=483)	21.2% (N=212)	39.0% (N=1,246)	43%
CACFP funds, child care learning centers	50.6% (N=541)	63.0% (N=484)	72.4% (N=221)	59.3% (N=1,246)	50%
CACFP funds, family child care homes	66.5% (N=507)	69.8% (N=328)	73.4% (N=199)	68.9% (N=1,034)	61%
Head Start or Early Head Start	5.3% (N=674)	10.3% (N=565)	26.5% (N=257)	10.8% (N=1,496)	9%

*Includes metro Atlanta counties and Camden County.
+Source: Georgia Child Care Market Rate Survey, 2013: CAPS, p. 39; Georgia's Pre-K, p. 16; CACFP, p. 40; Head Start, p. 16.

In general, the findings from the two surveys appear to be similar, with a few exceptions (Table A.30). Statewide, a larger proportion of the child care learning centers and family child care homes responding to the Economic Impact Survey reported receiving CACFP funds than did the programs that responded to the Market Rate Survey. In total, the percentages of child care learning centers that report receiving Head Start or Early Head Start funds are similar in the two surveys.

Table A.30 also allows for a comparison of the types of revenues that child care providers reported receiving on the Economic Impact Survey, broken down by geographic area. Among the Economic Impact Survey's programs, a smaller share of centers in the large urban counties reported receiving CACFP funds than did centers located in other urban and rural counties, whereas the percentages of family child care homes receiving CACFP funds are similar across zones. The breakdown of the Economic Impact Survey results also shows that a larger percentage of responding child care learning centers in rural counties report receiving federal Head Start or Early Head Start funding than do centers in the larger urban counties or in other urban counties.

Parent Fees

The Economic Impact Study asked about the weekly base rates per child charged to parents based on the age of the child. Table A.31 reports these figures by program type and the three broad geographic areas of the Market Rate Survey. Regardless of type of program, fees in metro Atlanta/Camden County tend to exceed those in either other urban or rural counties. Child care learning centers in metro Atlanta/Camden County have the highest fees for all age ranges, and generally family child care homes in rural areas have the lowest fees. For all program types, fees are higher for younger children; they decline as children age.

The rates based on responses to the Economic Impact Study, shown in Table A.31, are very similar to those reported in the 2013 Georgia Child Care Market Rate Survey. For example, both the Economic Impact Survey and Market Rate Survey find that the median full-time weekly rate for infant care (birth to 12 months) charged statewide by early care learning centers is $140 (Table A.31; Market Rate Survey (MRS), p. 21). Similarly, the equivalent rate for family child care homes according to the Economic Impact Survey is $110 for children under age six months and $115 for children age six months but less than one year; the Market Rate Survey rate is $110.

The Economic Impact Study data indicate that licensed child care learning centers in the metro Atlanta area charged $179.50 a week for the younger infants and $175 for those six months to less than one year, whereas the Market Rate Survey finds a median weekly rate of $165.00 in this region. The reported median fee for infants in rural child care learning centers is $90.00 in both the Economic Impact Survey and the Market Rate Survey (MRS, pp. 26 and 36).

Both the Economic Impact Survey and Market Rate Survey find that the median full-time weekly rate for infant care (birth to 12 months) charged in the metro Atlanta area by family child care homes is $135 (MRS, pp. 26 and 36). Finally, Economic Impact Survey results show a median rate for infant care in rural areas of $85.00 among family child care homes, whereas the Market Rate Survey lists this weekly rate as $80.00.

For three year olds, the Market Rate Survey and the Economic Impact Survey find statewide median weekly rates of $120 for child care learning centers and $100 for family child care homes (MRS, p. 21; Table A.31). The median metro Atlanta/Camden County center rate for three year olds is $155 in the Market Rate Survey and $150 in the Economic Impact Survey, whereas median weekly family child care homes rates are $135 and $120 according to the Market Rate Survey and the Economic Impact Survey, respectively (MRS, p. 26; Table A.31). The Market Rate Survey finds that child care learning centers in rural areas charge median weekly rates of $85 compared to the Economic Impact Survey rate of $90. Family child care home median rates are $80, according to both surveys (MRS, p. 36; Table A.31).

Table A.31. Median Weekly Parent Rates by Provider Type Based on Economic Impact Survey Responses, Child's Age and Geographic Area

	Child Care Centers				Family Child Care Homes			
	Metro Atlanta	Other Urban	Rural	State-wide	Metro Atlanta	Other Urban	Rural	State-wide
Under 6 months	$179.50 (N=330)	$120.00 (N=255)	$90.00 (N=100)	$140.00 (N=685)	$130.00 (N=226)	$100.00 (N=155)	$85.00 (N=82)	$110.00 (N=463)
6 months but less than 12 months	$175.00 (N=354)	$118.00 (N=271)	$90.00 (N=104)	$140.00 (N=729)	$135.00 (N=273)	$100.00 (N=172)	$85.00 (N=101)	$115.00 (N=546)
12 months but less than 18 months	$169.00 (N=376)	$113.00 (N=282)	$90.00 (N=115)	$133.00 (N=773)	$125.00 (N=306)	$100.00 (N=196)	$80.00 (N=104)	$105.00 (N=606)
18 months but less than 24 months	$165.00 (N=377)	$112.50 (N=286)	$90.00 (N=112)	$130.00 (N=775)	$125.00 (N=279)	$95.00 (N=182)	$80.00 (N=107)	$105.00 (N=568)
2 years but less than 3 years	$160.00 (N=394)	$110.00 (N=313)	$90.00 (N=126)	$130.00 (N=833)	$125.00 (N=344)	$95.00 (N=243)	$80.00 (N=151)	$100.00 (N=738)
3 years but less than 4 years	$150.00 (N=413)	$108.00 (N=334)	$90.00 (N=132)	$120.00 (N=879)	$120.00 (N=307)	$92.50 (N=204)	$80.00 (N=133)	$100.00 (N=644)
4 years but less than 5 years	$145.00 (N=357)	$100.00 (N=277)	$85.00 (N=119)	$114.00 (N=753)	$110.00 (N=200)	$85.00 (N=144)	$75.00 (N=95)	$95.00 (N=439)
5 years but less than 6 years	$88.50 (N=322)	$72.50 (N=252)	$60.00 (N=105)	$75.00 (N=679)	$90.00 (N=157)	$75.00 (N=90)	$75.00 (N=79)	$80.00 (N=326)
6 years to 13 years	$75.00 (N=358)	$65.00 (N=276)	$50.00 (N=121)	$68.00 (N=755)	$75.00 (N=190)	$70.00 (N=126)	$65.00 (N=97)	$70.00 (N=413)

Summary of provider characteristics:

- More than 80% of centers and 95% of family child care homes operate on a 12-month basis; at least 13% of family child care homes and 10% of child care learning centers offer care on Saturdays, Sundays, or holidays.
- The median annual revenue per enrolled child in child care learning centers (not including Head Start or Georgia's Pre-K Programs) is $3,856, and in family child care homes, it is $3,920.
- The median weekly parent fee ranges from $68 for children age six to 13 to $140 for infants under age 12 months for child care learning centers and from $70 for children age six to 13 to $115 for infants age six months to less than 12 months for family child care homes, depending on geographic area.

EARLY CARE AND EDUCATION INDUSTRY WORKFORCE CHARACTERISTICS

The early care and education industry in Georgia directly employs more than 67,000 men and women across the state. These employees work in a variety of jobs including as administrators and owners, teachers, assistant teachers, clerical and other office staff, kitchen staff, drivers, and specialists that provide services for children with special needs or technical assistance to providers. This section describes this workforce in detail, including where they are employed, their hours worked, the wages they earn, the benefits they receive, and some general demographics.

Number of Employees

The total number of employees reported by survey respondents is 25,346. Table A.32 breaks down these employees by position.[5] Chapter 2 of the main report used these data to estimate that a total of 67,507 employees work in the early care and education industry in Georgia. If these employees are distributed by position similarly to the survey data, then 15,349 industry workers, for example, would be lead teachers of non-Georgia's Pre-K or Head Start programs and 13,791 would be assistant teachers of such programs. Altogether, teachers compose 81.9% of all employees in Georgia's early care and education industry: 39.4% are lead teachers (including family child care home operators), 33.0% assistant teachers (including paid assistants), and 9.5% are other teaching staff.

Approximately 26% of the responding family child care homes report having part-time or full-time paid assistants or substitute caregivers in their homes.

[5] Each participating family child care home was assigned one operator for purposes of these computations. Because 1,173 family child care homes responded to the survey, the estimated number of operators listed in Table A.32 is 1,173.

Table A.32. Total Number of Employees in Georgia's Early Care and Education Industry by Position

All Types of Programs	Economic Impact Study		Statewide
Type of Position	Total Employees	Percent of Employees	Estimated Number
Administrators/directors	1,767	7.0	4,706
Assistant directors	816	3.2	2,173
Principals	8	0.03	21
Lead teachers, non-GA Pre-K/HS	5,763	22.7	15,349
Lead teachers, GA Pre-K/HS	3,064	12.1	8,161
Assistant teachers, non-GA Pre-K/HS	5,178	20.4	13,791
Assistant teachers, GA Pre-K/HS	2,909	11.5	7,748
Other teaching staff	2,420	9.5	6,446
Specialists	467	1.8	1,244
Clerical staff	335	1.3	892
Other staff	1,155	4.6	3,076
Family child care home operators	1,173	4.6	3,124
Paid assistants	290	1.1	775
Total	25,345	100.0	67,507

*A total of 2,773 programs answered the question about the number of employees: 1,343 child care learning centers, 596 schools, and 834 family child care homes. The 1,173 family child care home operators figure is an estimate based on the fact that each family child care home has one operator and 1,173 family child care homes responded to the survey.

In child care learning centers, the average number of employees is 16, and the median number is 13. The largest subset (totaling 79%) of staff at centers are lead and assistant teachers and other teaching staff, as shown in Table A.33.

Table A.33. Percentage of Staff by Position, Child Care Learning Centers

Type of Staff	Child Care Learning Centers (N=21,113)
Administrators/Directors	8.1%
Assistant directors	3.9%
Lead teachers, non-GA Pre-K/HS	27.3%
Lead teachers, GA Pre-K/HS	8.3%
Assistant teachers, non-GA Pre-K/HS	24.5%
Assistant teachers, GA Pre-K/HS	7.6%
Other teaching staff	11.3%
Specialists	2.2%
Clerical staff	1.4%
Other staff	5.4%
Total	100%
Average number of staff per center	16
Median number of staff per center	13

Staff Turnover

Staff turnover is an often-mentioned concern of this industry because of its impact on children, especially if temporary substitute teachers are hired until a permanent position is filled. Research shows that a key to providing quality child care programs is the retention of staff members, particularly teachers and administrators (e.g., Helburn and Howes 1996; Whitebook and Sakai 2004). Additionally, turnover can be costly for early care and education programs because of the expense involved in training new staff in areas such as curriculum, best practices, health, and safety.

Eighty percent of all responding centers and 93% of all responding schools report having had one or more permanent employees leave during the year prior to the survey (Table A.34). In addition, 37% of responding centers report employing seasonal or temporary employees. Centers indicated that teachers were the most likely type of employee to have left the program in the past year (Table A.35).

Approximately 65% of center and school respondents and 54% of family respondents did not answer the question about staff turnover. Programs may have left this question blank instead of indicating that they had no staff turnover, and many family child care homes may have left the question blank because they had never employed a paid assistant. Likewise, 75% of center respondents did not answer the question about seasonal and temporary staff. Again, many may have left this question blank because they have never employed these types of staff.

Table A.34. Percentage of Providers Losing Employees or Hiring Seasonal or Temporary Staff in the Year Prior to the Survey

	Child Care Learning Centers	Family Child Care Homes	Schools
Lost permanent employees in the year prior to the survey (all program types)			
Percentage of responding providers losing at least one employee	80.4% (N=535)	15.80% (N=537)	93.2% (N=207)
Average number of employees lost (among those who lost employees)	5.2	1.5	5.0
Hired seasonal or temporary employees in the year prior to the survey (child care learning centers only)			
Percentage of responding centers that hired seasonal staff	36.9% (N=371)	N/A	N/A
Average number of seasonal or temporary employees hired	5.3	N/A	N/A

Table A.35. Percentage of Child Care Learning Center Staff Who Left Programs in the Year Prior to the Survey, by Position

Type of Staff	Child Care Centers
Administrators/directors	9.4%
Assistant directors	3.3%
Lead teachers, non-GA Pre-K/HS	29.3%
Lead teachers, GA Pre-K/HS	7.4%
Assistant teachers, non-GA Pre-K/HS	32.1%
Assistant teachers, GA Pre-K/HS	6.2%
Other teaching staff	7.4%
Specialists	1.3%
Clerical staff	1.1%
Other staff	2.5%
Total	100.0%

Note: 2,215 child care learning centers answered this question.

Hours Worked

The average and median number of hours worked by all types of employees is reported in Table A.36. Child care learning center staff work full-time for the most part, with the medians ranging between 28 and 40 hours per week. Paid assistants in family child care homes, on the other hand, work an average of 31 hours per week.[6] Center nonresponse on hours worked ranges from a low of 28% for administrators and directors to 86% for specialists. Of the family child care homes with paid assistants, 33% did not answer the question.

Table A.36. Number of Hours Worked by Early Care and Education Providers

Type of Program	Type of Staff	Mean Hours	Median Hours
Child Care Learning Centers (N=1,080)	Administrators/directors	42	40
	Assistant directors	39	40
	Lead teachers, non-GA Pre-K/HS	37	40
	Lead teachers, GA Pre-K/HS	40	40
	Assistant teachers, non-GA Pre-K/HS	33	36
	Assistant teachers, GA Pre-K/HS	39	40
	Other teaching staff	28	28
	Specialists	36	40
	Clerical staff	33	40
	Other staff	33	37
Family Child Care Homes (N=144)	Paid assistants	31	25

Wages Earned

The median hourly wages received by employees of child care learning centers by type of position, urban or rural residence, and the program's profit status are reported in Table A.37.

Among employees of centers, lead Georgia's Pre-K or Head Start teachers and administrators/directors and specialists have the highest wages, with a median of $16 per hour statewide for lead Georgia's Pre-K or Head Start teachers, $15 per hour for administrators and directors, and $12 per hour for specialists. Wages tend to be slightly higher in urban than rural areas. Wages paid by not-for-profit child care learning centers are also higher for most categories. Between 37% and 88% of center respondents did not answer the questions about wages, depending on the position category (the lowest response rate was for clerical positions, and the highest was for administrators).

The median wage of paid assistants in family child care homes is $8.00 per hour (not shown). Of the responding family child care homes with paid assistants, 3% did not answer the question about wages received by their paid assistants.

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[6] This estimate has wide variation. It was difficult to determine whether responses pertained to weeks or months. Follow-up communication with early care and education providers indicates that while some gave a weekly amount, others gave a number of hours that spanned longer periods of time.

Table A.37. Hourly Median Wages for Staff in Child Care Learning Centers, by Position, Geographic Area, and Profit Status

Type of Staff	State	Urban	Rural	For-Profit Mean	Not-for-Profit Mean
Administrators/directors	$15.00 (N=947)	$15.00 (N=782)	$12.00 (N=165)	$14.00 (N=561)	$15.00 (N=365)
Assistant directors	$11.00 (N=567)	$11.00 (N=485)	$10.00 (N=82)	$10.88 (N=412)	$12.00 (N=142)
Lead teachers, non-Georgia's Pre-K or Head Start	$9.00 (N=916)	$9.36 (N=764)	$8.00 (N=152)	$9.00 (N=610)	$10.00 (N=288)
Lead teachers, Georgia's Pre-K or Head Start	$16.00 (N=476)	$16.00 (N=412)	$16.38 (N=64)	$17.00 (N=314)	$15.00 (N=149)
Assistant teachers, non-Georgia's Pre-K or Head Start	$8.23 (N=746)	$8.50 (N=634)	$7.75 (N=112)	$8.00 (N=501)	$8.63 (N=230)
Assistant teachers, Georgia's Pre-K or Head Start	$9.00 (N=486)	$9.00 (N=420)	$9.50 (N=66)	$9.00 (N=320)	$9.75 (N=152)
Other teaching staff	$8.00 (N=453)	$8.35 (N=375)	$7.65 (N=78)	$8.00 (N=263)	$8.50 (N=173)
Specialists	$12.00 (N=203)	$12.00 (N=166)	$12.00 (N=37)	$10.00 (N=79)	$14.77 (N=116)
Clerical staff	$10.00 (N=174)	$10.00 (N=152)	$8.50 (N=22)	$9.75 (N=76)	$10.00 (N=95)
Other staff	$9.00 (N=425)	$9.00 (N=333)	$8.50 (N=92)	$9.00 (N=237)	$9.00 (N=178)

Benefits Offered

Tables A.38 and A.39 provide the percentages of respondents who offer full- or part-time staff any of the listed benefits. Child care learning centers most often cited paid holidays, paid leave, free or reduced-price care for dependents, and paid time for training and education among the benefits they offer their full-time employees, regardless of whether they house Georgia's Pre-K or Head Start programs. For part-time employees, centers reported paid time for training and education, free or reduced-price care for dependents, and payment for training, tuition, or registration fees as the most commonly offered benefits. Nearly all public schools offering Georgia's Pre-K provide health insurance, paid leave, retirement plans, and paid time for training and education to their full-time employees. For part-time employees, small percentages of schools reported paid time for weather closures and training and education, and payment for training, tuition, or registration fees as the most commonly offered benefits.

Table A.38. Benefits Offered to Non-Georgia's Pre-K/Head Start Staff, by Program Type and Employment Status

Type of Benefit	Child Care Learning Centers (N=1,454 unless otherwise specified)		Family Child Care Homes (N=1,147)	
	Full-time	Part-time	Full-time	Part-time
Free or reduced-price care	57.3%	32.9%	5.0%	3.0%
Paid holidays	63.3%	20.4%	5.3%	2.1%
Paid time for training and education	54.6%*	35.0%*	4.2%	2.8%
Payment for training, tuition, registration fees	49.7%	32.0%	5.1%	2.6%
Paid time for weather closures	38.9%	16.4%	4.4%	1.8%
Paid leave	58.8%	17.4%	3.4%	1.4%
Overtime pay	46.7%	23.9%	2.8%	1.2%
Health insurance	28.9%	6.8%	1.0%	--
Dental/vision insurance offered	24.7%	6.5%	0.5%	--
Retirement plan	25.5%	7.8%	0.4%	--
Other benefit	4.9%	1.9%	--	--

Note: N=1,453 for these two responses.

Table A.39. Benefits Offered to Georgia's Pre-K/Head Start Staff, by Program Type and Employment Status

	Child Care Learning Centers		Schools	
Type of Benefit	Full-time (N=650 unless specified)	Part-time (N=599 unless specified)	Full-time (N=650 unless specified)	Part-time (N=599)
Free or reduced-price care	57.4%	26.3% (N=650)	--	--
Paid holidays	75.4%	16.8%	63.8%	4.3%
Paid time for training and education	78.0%	27.8%	89.5%	7.5%
Paid time for weather closures	54.9%	14.6%	68.4%	8.0%
Paid leave	69.2%	15.4%	90.8%	5.5%
Overtime pay	44.2%	19.4%	19.2%	2.2%
Health insurance	48.2%	9.5%	94.5%	4.8%
Dental/vision insurance offered	39.8%	9.2%	84.1%	4.2%
Retirement plan	44.3%	8.9% (N=650)	90.7% (N=599)	4.3%
Other benefit	6.6% (N=649)	1.8% (N=649)	7.2% (N=599)	0.3%

A very small proportion of family child care homes reported offering benefits to their paid assistants, but again, only 26% of family child care homes employ paid assistants (see discussion of Table A.32). The family child care home operators that responded to this survey range in age from 24 to more than 80, with an average age of 54. These owners/operators were also asked whether they have health insurance and retirement plans for themselves. Of the 1,091 who responded, 75.5% have health insurance (Table A.40). Nearly all with health insurance also indicated the source of that insurance. Less than 2% of the operators with health insurance obtain it through their family child care home, whereas 52.3% obtain their health insurance through a spouse's or partner's employer, and the rest from another source.

Slightly more than one-fifth (21.6%) of the responding owners/operators have retirement savings in addition to Social Security. More of these indicated the source of their retirement than that they have retirement, so it is possible that 26.7% have retirement savings. Of these, 11.6% have such savings through their family child care homes, 39.4% through a spouse's or partner's employer, and nearly half, 48.9% have retirement savings through another source.

Table A.40. Benefits Family Child Care Home Owners/Operators Provide for Themselves

	Frequency	Percent
Do you have health insurance?		
Yes	824	75.5
No	267	24.5
Total	1,091	100.0
If you have health insurance, do you get health insurance through your…		
Family child care home	13	1.6
Spouse's or partner's employer	427	52.3
Other	377	46.1
Total	817	100.0
Do you have retirement savings in addition to Social Security?		
Yes	230	21.6
No	833	78.4
Total	1,063	100.0
If you have retirement savings, do you save for retirement through your…		
Family child care home	33	11.6
Spouse's or partner's employer	112	39.4
Other	139	48.9
Total	284	100.0

Family child care home operators were also asked what they usually do when they are too sick to work. Nearly half (46.3%) of the responding operators contend that they rarely get sick (Table A.41). Approximately 29% say they close, 5.1% hire a substitute, and 14.6% ask a friend, family member, or neighbor to help out. Twenty-three providers wrote in under "other" that they work even when they are sick.

Table A.41. What do you usually do when you are too sick to work?

Strategies Used by Family Child Care Home Owners	Number	Percent
Hire a substitute	47	5.1
Close	264	28.8
A friend, family member, or neighbor helps out	134	14.6
Rarely get sick	424	46.3
Other, please specify	47	5.1
Has a back-up provider		
Work when sick		
Total	916	100.0

Racial and Gender Composition of Staff

Table A.42 shows the racial/ethnic composition of staff in various positions in the three types of early care and education settings. Approximately 30% to 70% of respondents did not answer one or more questions on racial composition.

Table A.42. Racial Composition of Early Care and Education Staff, by Program Type

Type of Program	Type of Staff	% Non-Hispanic White	% Non-Hispanic Black	% Non-Hispanic Asian	% Hispanic	% Multi-racial	% Other Races
Child Care Learning Centers	Lead teachers of infant/toddlers (N=3,499)	39.8	5.16	1.4	4.7	1.2	1.3
	Lead teachers of 3 year olds (N=1,861)	37.2	54.3	0.7	4.8	1.3	1.6
	Lead teachers of 4 year olds (not GA Pre-K) (N=1,058)	43.2	44.9	1.4	7.5	1.1	1.9
	Lead GA Pre-K Teachers (N=1,205)	50.9	41.3	1.2	4.0	1.6	1.1
	Lead teachers of 5+ year olds (N=1,071)	32.8	57.8	0.9	2.1	0.8	5.6
	Other teaching staff (N=4,552)	43.2	47.6	1.7	5.2	1.2	1.0
	Administrators, directors, and specialists (N=1,990)	52.2	40.7	1.4	3.6	1.1	1.2
Family Child Care Homes	Owners (N=839)	37.8	53.0	1.8	3.2	2.3	1.9
	Paid assistants (N=374)	31.3	58.8	1.1	2.4	4.8	1.6
Schools	Directors and administrators (N=121)	76.9	20.7	0.0	0.8	0.8	0.8
	Principals (N=352)	63.9	34.4	0.0	1.4	0.0	0.3
	Lead GA Pre-K Teachers (N= 1,145)	71.8	25.8	0.3	1.7	0.4	0.0
	Assistant GA Pre-K Teachers (N=1,035)	56.6	39.4	0.6	2.8	0.1	0.5
	Other teaching staff (N=49)	79.6	20.4	0.0	0.0	0.0	0.0
	Specialists (N=100)	88.0	10.0	0.0	1.0	1.0	0.0
	Clerical staff (N=55)	72.7	25.5	0.0	1.8	0.0	0.0

Staff of child care learning centers are diverse in terms of race; depending on age of children taught and position, between 41% and 54% of the teachers are reported to be Non-Hispanic Black, and 33% to 51% Non-Hispanic White. Of the remaining center staff, the largest percentage in any one group tends to be Spanish, Latino, or Hispanic (2% to 7%). In family child care homes, the majority of owners/operators and paid assistants are described as Non-Hispanic Black. Hispanics, Asians, and bi-racial employees make up a small minority of the staff for all child care facilities (no more than 7%).

Table A.43 reports the gender breakdown of Georgia's early care and education workforce. Females make up the large majority of early care and learning staff. The staff who are most likely to be male are lead teachers for older children (age 5+) in centers, paid assistants in family child care homes, and school principals, directors, or administrators. One possible explanation for the male presence in family child care homes may be that assistants are often the husband or partner of the family child care home owner/operator.

Table A.43. Gender Composition of Early Care and Education Programs

Type of Program	Type of Staff	Percent Female	Percent Male
Child Care Learning Centers	Lead teachers of infants/toddlers (N=3,590)	96.7	3.3
	Lead teachers of 3 year olds (N=1,773)	92.5	7.5
	Lead teachers of 4 year olds (not Georgia's Pre-K) (N=915)	93.3	6.7
	Lead Georgia's Pre-K Teachers (N=1,137)	94.5	5.5
	Lead teachers of 5+ year olds (N=932)	84.1	15.9
	Other teaching staff (N=4,271)	95.6	4.4
	Administrators, directors, and specialists (N=1,963)	93.3	6.7
Family Child Care Homes	Family child care home owners (N=701)	97.3	2.7
	Paid assistants (N=341)	87.1	12.9
Schools	Directors and administrators (N=102)	88.2	11.8
	Principals (N=322)	75.5	24.5
	Lead Georgia's Pre-K teachers (N=1,216)	98.2	1.8
	Assistant Georgia's Pre-K teachers (N=1,045)	98.2	1.8
	Other teaching staff (N=42)	95.2	4.8
	Specialists (N=63)	95.2	4.8
	Clerical staff (N=48)	100.0	0.0

Assisting in Students' Home Languages

Of the 21,113 staff who work in child care learning centers identified through the Early Care and Education Economic Impact Survey, 375 (1.8%) are recognized as being able to teach in students' home languages other than English (Table A.44). The majority of the bilingual staff serve as teachers. Lead teachers of children age five or older are the least represented among this group. Of the 2,769 staff members identified as working in schools in this report, 21 (0.08%) are recognized as staff who could teach in a child's home language (other than English), if needed. Approximately 17% of the 169 child care home owners/operators who responded to this question indicated that they could teach in some children's home language(s) if other than English, and of the 333 who responded when asked the same question about a paid assistant, 2.7% indicated they have a paid assistant who could do so (not shown).

Table A.44. Distribution of Those Staff Members Recognized as Able to Teach in Students' Home Languages, if Other than English

Type of Program	Type of Staff	Percent
Child Care Learning Centers (N of staff=375)	Lead infant/toddler teachers	15.2
	Lead teachers of 3 year olds	17.9
	Lead teachers of 4 year olds (not Georgia's Pre-K)	26.1
	Lead Georgia's Pre-K teachers	13.3
	Lead 5+ year old teachers	2.4
	Other teaching staff	18.4
	Administrators, directors, and specialists	6.7
Schools (N of staff=21)	Directors and administrators	--
	Principals	--
	Lead Georgia's Pre-K teachers	47.6
	Assistant Georgia's Pre-K teachers	38.1
	Other teaching staff	--
	Specialists	--
	Clerical staff	--

Note: Responses in cells with fewer than five cases are not shown.

Education and Credentialing of Programs

Tables A.45 and A.46 show the percentages of child care learning center staff, paid assistants, family child care home owners, and school staff who have completed the level of education category listed on the left as their highest level of education. Table A.47 presents the percentages of each type of staff who were enrolled in technical or other college and/or an early childhood education program (ECE) at the time of the study. Table A.48 provides the percentages of staff by position who have the listed credentials. In all tables in this section, the columns may not sum to exactly 100% because some respondents did not complete the question for all staff members and some cited more than one category for some individuals. Also note that in Table A.48, because some individuals may have multiple credentials, it is not possible to sum these percentages to determine what percentage of caregivers/teachers has any type of credential, or conversely, what percentage has no credential. Between 54% and 97% of respondents across all provider types did not answer the education or credentialing questions.

Table A.45 Highest Level of Education of Child Care Learning Center Staff

	Child Care Learning Centers						
Education Level	Lead Teachers, Infants, Toddlers, 2 Yr Olds (N=5,168)	Lead Teachers, 3 Yr Olds (N=2,886)	Lead Teachers, 4 Yr olds, Not GA Pre-K (N=1,632)	Lead Teachers, GA Pre-K (N=1,729)	Lead Teachers, 5+ Yr olds (N=1,366)	Other Teaching Staff (N=5,824)	Admini-strators, Directors, Specialists (N=349)
Some high school	8.3%	6.5%	6.9%	6.0%	11.7%	8.2%	7.1%
High school diploma or GED	28.4%	24.9%	22.5%	20.4%	30.7%	37.5%	23.1%
Some college but no CDA credential or degree	9.4%	8.2%	7.2%	3.8%	15.5%	16.5%	9.7%
Child Development Associate (CDA)	22.2%	18.3%	14.4%	4.5%	10.2%	13.8%	9.8%
Technical certificate of credit (TCC)	8.2%	7.5%	4.0%	1.6%	4.5%	3.7%	5.7%
Technical college diploma (TCD)	3.7%	3.9%	2.8%	0.7%	3.0%	2.7%	3.2%
Associate's degree (AA or AS)	6.9%	10.3%	8.1%	6.0%	4.6%	6.6%	7.6%
Bachelor's degree(BA or BS)	10.1%	17.0%	24.1%	43.9%	16.1%	8.0%	20.9%
Master's degree (MA, MS, Med, MBA, etc.)	1.5%	3.0%	5.5%	12.1%	2.8%	1.5%	10.4%
Specialist (EdS)	0.1%	0.3%	4.2%	0.9%	0.7%	1.3%	1.6%
Doctor of Philosophy or Education (PhD or EdD) or other terminal degree (MD, JD, etc.)	1.2%	0.1%	0.3%	0.1%	0.1%	0.1%	0.8%

Very small percentages of programs have teachers with less than a high school education (Tables A.45 and A.46). On average, 54.3% to 73.6% of the lead teachers and other teaching staff in child care learning centers have some education beyond a high school diploma, as do 57.9% of responding family child care owners and 41.6% of paid assistants. More than half (57%) of center-based lead Georgia's Pre-K teachers, nearly all (92.3%) school-based lead teachers of Georgia's Pre-K, and 15.2% of school-based assistant Georgia's Pre-K teachers have earned at least a bachelor's degree (Tables A.46 and A.47).

Differences between Georgia's Pre-K teachers and other types of teachers are expected because Georgia's Pre-K teachers have higher minimum educational/credential requirements than do some other teachers. As of 2012, the Child Development Associate (CDA) became the minimum required credential for lead teachers. As of the 2014–2015 survey period, 4.5% to 22.2% of center employees (depending on position), 6.7% of paid assistants, and 14.5% of family child care home owners have the CDA as their highest degree. These are likely to be undercounts of those possessing a CDA because the survey asked programs to note the highest level of education of each employee and many employees may have a credential that is higher than a CDA.

Table A.46. Highest Level of Education of Early Care and Education among Family Child Care Home and School-based Georgia's Pre-K Employees

	Family Child Care Homes		Schools			
Education Level	Owner (N=1,847)	Paid Assistants (N=535)	Lead GA Pre-K Teachers (N=1,237)	Assistant GA Pre-K Teachers (N=1,023)	Other Teaching Staff (N=82)	Admin., Directors, Specialists (N=3,446)
Some high school	4.5%	11.3%	1.5%	2.2%	0.0%	1.7%
High school diploma or GED	37.6%	47.1%	4.8%	40.2%	8.5%	6.0%
Some college but no CDA credential or degree	16.0%	14.9%	0.9%	19.8%	2.4%	0.9%
Child Development Associate (CDA)	14.5%	6.7%	0.0%	5.2%	0.0%	0.0%
Technical certificate of credit (TCC)	8.7%	4.1%	0.1%	1.8%	2.4%	0.3%
Technical college diploma (TCD)	5.5%	4.6%	0.1%	4.3%	0.0%	0.6%
Associate's degree (AA or AS)	5.0%	2.1%	0.3%	11.3%	1.2%	1.1%
Bachelor's degree (BA or BS)	5.6%	6.0%	63.9%	13.8%	24.4%	7.7%
Master's degree (MA, MS, Med, MBA, etc.)	2.3%	1.8%	22.2%	1.2%	51.2%	28.1%
Specialist (EdS)	0.0%	0.7%	5.8%	0.2%	8.5%	40.4%
Doctor of Philosophy or Education (PhD or EdD) or other terminal degree (MD, JD, etc.)	0.3%	0.7%	0.4%	0.0%	1.2%	13.2%

Enrollment in College, Technical College, or Early Childhood Education Programs

At the time of the survey, almost a quarter of lead teachers were enrolled in college or technical college. An estimated 14% to 22% of all reported center-based lead teachers of children not enrolled in Georgia's Pre-K, 8.6% of family child care home owners/operators, and 20% of paid assistants were enrolled in college or technical college at the time of the survey (Table A.47).

Large proportions of these teachers were enrolled in early childhood education degree programs. For example, 71.8% of the lead infant/toddler teachers enrolled in a college or technical college were reported to be in an ECE program (Table A.47). Few lead and assistant school-based teachers were reported to be attending college or technical college at the time of the survey. Of these, about half of each group were enrolled in ECE programs (Tables A.47).

Table A.47. Enrollment in College, Technical College, and Early Childhood Education (ECE) Programs among Early Care and Education Industry Employees

		Percent Attending College or Technical College†	Of Those Attending College & Others, Percent Enrolled in ECE Program
Child Care Learning Centers (N=2,149/N=1,414)	Lead teachers of infants/toddlers (N=609/N=437)	22.0	71.8
	Lead teachers of 3 year olds (N=269/N=224)	18.1	83.3
	Lead teachers of 4 year olds (not Georgia's Pre-K) (N=118/N=82)	14.0	69.5
	Lead teachers of 5+ year olds (N=143/N=76)	17.6	53.1
	Lead Georgia's Pre-K teachers (N=66/N=47)	6.8	71.2
	Other teaching staff (N=746/N=432)	18.4	57.9
	Administrators, directors, and specialists (N=198/N=116)	9.1	58.6
Family Child Care Homes (N=159 /N=54)	Family child care home owners (N=101/N=54)	8.6	53.5
	Paid assistants (N=351)	20.0	--
Schools (N=65/N=32)	Directors and administrators	--	--
	Principals	--	--
	Lead Georgia's Pre-K teachers (N=22/N=10)	1.7	45.5
	Assistant Georgia's Pre-K teachers (N=35/N=20)	2.7	57.1
	Other teaching staff	--	--
	Specialists	--	--
	Clerical staff	--	--

Note: Responses in cells with fewer than five cases are not shown.
†These compare the number enrolled as reported in this table with total counts for each position shown in Table A.32 by type of program. For these purposes, all center-based lead teachers except Georgia's Pre-K teachers are grouped together because the data used to calculate Table A.32 do not differentiate non-Georgia's Pre-K teachers by age group. Head Start and Early Head Start teachers are included in the age group of the children they serve and are not included in the Georgia's Pre-K data.

All school-based lead and assistant Pre-K teachers report having a state of Georgia teaching certificate or comparable certificate from another state. Lead Pre-K teachers were more likely to have a state of Georgia teaching certificate (99.7%) compared to assistant Pre-K teachers (62%) (Table A.48). Similarly, all school administrators, directors, and specialists hold a teaching certificate; 99.7% are from Georgia. Nearly 75% of the 1,075 reported lead Georgia's Pre-K teachers at centers hold teaching certificates, mostly from Georgia (70%). Center lead teachers are very likely to have some kind of specific curriculum training, like Montessori, Creative Curriculum, High/Scope, or another (Table A.48).

Of the 1,173 family child care home owners/operators who responded to the Economic Impact Survey, only 191 (16.3%) indicated whether they held a Georgia teaching certificate (not shown). Of these respondents, 28.3% (n=54) have a Georgia teaching certificate. Likewise, of the 380 family child care home owners/operators who answered the question about having a teaching certificate from another state, 1.8% indicated that they have such a teaching certificate. More than a third (35.3%) of the 204 responding family child care home owners/operators have specific curriculum training.

Eleven (3.7%) of the 299 family child care home owners/operators who responded have a paid assistant who holds a teaching certificate from Georgia, and 35.7% (n=25) of the 70 who responded have a paid assistant who holds a teaching certificate from another state. Only 4.6% (n=13) of the 281 who provided information about specific curriculum training have an assistant with Montessori, High/Scope, or another type of curriculum training.

Table A.48. Credentials of Early Care and Education Program Staff

Type of Program	Type of Staff	Georgia Teaching Certificate	Teaching Certificate, Other State	Specific Curriculum Training*
Child Care Learning Center	Lead infant/toddler teachers (N=522)	25.7%	6.7%	67.6%
	Lead teachers of 3 year olds (N=538)	33.5%	4.8%	61.7%
	Lead teachers of 4 year olds (N=513)	49.7%	4.7%	45.6%
	Lead Georgia's Pre-K teachers (N=1,075)	70.0%	3.5%	26.4%
	Lead teachers of 5+ year olds (N=226)	46.0%	9.7%	44.2%
	Other teaching staff (N=720)	22.1%	2.5%	75.4%
	Administrators, directors, specialists (N=741)	39.7%	6.9%	53.4%
School	Lead Georgia's Pre-K teachers (N=1,161)	99.7%	0.3%	n/a
	Assistant Pre-K teachers (N=639)	62.0%	38.0%	n/a
	Other teachers (N=69)	100.0%	0.0%	n/a
	Administrators, directors, specialists (N=302)	99.7%	0.3%	n/a

*Note: for example, Montessori, High/Scope, Creative Curriculum, etc.

More than two-thirds of programs indicated that they are "very" to "completely" satisfied with the quality of their staff (Table A.49). Only 1% of center directors, less than 1% of school-based Georgia's Pre-K directors, and 12% of family child care home owners are not at all satisfied with the quality of their staff.

Table A.49. How satisfied are you with the quality of your program's staff (knowledge, skills, experience, etc.)?

	Type of Provider			
	Child Care Learning Centers (N=1,292)	Family Child Care Homes (N=315)	Schools* (N=590)	Total (N=2,197)
Completely satisfied	22.4%	38.1%	31.5%	27.1%
Very satisfied	46.4%	30.2%	46.1%	44.0%
Somewhat satisfied	30.3%	20.0%	22.2%	26.6%
Not at all satisfied	0.9%	11.7%	--	2.3%
Total	100.0%	100.0%	100.0%	100.0%

*Responses in cells with fewer than five cases are not shown.

Summary of the early care and education workforce characteristics:

- The median wage for administrators in centers is $15 per hour; lead teachers earn a median of $9 to $16 per hour (depending on the age group taught); and assistant teachers earn a median of $8.23 to $9 per hour. In family child care homes, the median hourly wage for paid assistants is $8 per hour. In school-based programs, administrators/directors earn a median wage of $64.78 per hour; lead teachers earn a median of $27.64 per hour; and assistant teachers earn a median of $11.04 per hour.
- Paid holidays, paid leave, free or reduced-price care for dependents, and paid time off for training are among the benefits most often provided by child care learning centers. Health insurance, paid leave, retirement plans, and paid time for training and education are among the benefits most often provided by public schools.
- Teachers and caregivers in the industry are racially diverse; in most teacher categories at responding child care learning centers, over 40% of teachers are identified as Non-Hispanic Black. More than 50% of responding family child care home owners and paid assistants are identified as Non-Hispanic Black. In responding schools, at least 20% of the teaching staff are described as Non-Hispanic Black. A very small proportion of teachers and caregivers, 5% or less, are identified as Hispanic. Ninety percent or more of teachers and caregivers in almost every category (depending on age group taught) are identified as female.
- Approximately 94% of school-based and 74% of center-based lead teachers of Georgia's Pre-K, 58% of family child care owners, and 42% of paid assistants have some education beyond a high school diploma.
- Respectively, 73.5% and 100% of lead Georgia's Pre-K teachers in centers and schools hold a teaching certificate from Georgia or another state. In addition, 32.4% to 55.7% of other lead center-based teachers have teaching certificates (depending on age group taught).

PROGRAMS' OPINIONS ABOUT THEIR BUSINESSES

Programs were asked a series of questions about their businesses. This section explores respondents' opinions about the external resources they have available as well as the possibilities for partnering with schools or businesses. The percentages of missing information tend to be low on these questions.

Resources to Support Their Businesses

Programs were asked if they feel there are more than enough, just enough, or not enough of four types of resources: state resources to develop their workforce, community resources for their center or home, state resources to improve program quality, and financial incentives to help support their business. In regard to the availability of state resources to develop their workforce, 55% of centers, 66% of family child care homes, and 63% of schools indicate there are "more than enough" or "just enough" resources (Table A.50). However, approximately three-quarters of respondents feel there are "not enough" community resources available. More than 67% of responding center- and family-based programs say there are not enough financial incentives to help support their business.

Opinions were split regarding state resources to improve quality in their programs. Half of the responding programs indicate there are "not enough" state resources to improve quality in their programs. Another 9% to 16% (depending on program type) assert that there are more than enough state resources, but 36% to 42% indicate that there are only "just enough" of such state resources.

Table A.50. Are there more than enough, just enough, or not enough of the following:

			More than enough		Just enough		Not enough		Total	
			#	%	#	%	#	%	#	%
State resources to help develop your program's workforce	Type of program	Centers	224	18.2	458	37.1	551	44.7	1,233	100.0
		Homes	310	28.4	415	38.0	366	33.5	1,091	100.0
		Schools	53	9.3	309	54.1	209	36.6	571	100.0
		Total	587	20.3	1182	40.8	1126	38.9	2,895	100.0
Resources in your community for your program	Type of program	Centers	86	6.9	228	18.4	924	74.6	1,238	100.0
		Homes	59	5.4	186	17.1	842	77.5	1,087	100.0
		Schools	17	3.0	109	19.1	445	77.9	571	100.0
		Total	162	5.6	523	18.1	2,211	76.3	2,896	100.0
State resources to improve quality in your program	Type of program	Centers	137	11.3	433	35.6	647	53.2	1,217	100.0
		Homes	173	16.2	394	36.9	501	46.9	1,068	100.0
		Schools	53	9.3	238	41.7	280	49.0	571	100.0
		Total	363	12.7	1,065	37.3	1,428	50.0	2,856	100.0
Financial incentives to help support your program	Type of program	Centers	55	4.6	239	19.9	908	75.5	1,202	100.0
		Homes	81	7.5	268	24.7	737	67.9	1,086	100.0
		Total	136	5.9	507	22.2	1,645	71.9	2,288	100.0

Potential Partnerships

The three types of programs view their level of connection with local schools that provide services for children with special needs, after-school care, and transition-to-school issues differently. Approximately 87% of child care learning centers indicated that they are "very" (50.2%) or "loosely" (37.2%) connected to local schools. In contrast, nearly half (47.3%) of family child care homes describe their relationship with local schools as "not at all connected." Not surprisingly, the vast majority (84.5%) of school-based Georgia's Pre-K directors report feeling "very connected" with their school system's services (Table A.51).

Table A.51. How connected is your program to the local school(s) that provide services for children with special needs, after-school care, transition-to-school issues?

		Type of Program			
		Child Care Learning Centers	Family Child Care Homes	Schools	Total
Very connected	Number	645	278	480	1,403
	Percent	50.2	24.5	84.5	46.9
Loosely connected	Number	478	321	87	886
	Percent	37.2	28.2	15.3	29.6
Not at all connected	Number	161	538	1	700
	Percent	12.5	47.3	0.2	23.4
Total	Number	1,284	1,137	568	2,989
	Percent	100.0	100.0	100.0	100.0

Based on survey responses, it seems that only a modest share of Georgia's early care and education programs have direct connections with businesses or parents who receive employer tuition assistance with child care.

Table A.52 shows that only one-quarter (26.4%) of child care learning centers reported having an association with a business that provides referrals, subsidies, or incentives for employees who enroll their children with that center. Table A.53 indicates that although only 3.9% of responding centers and 8.4% of responding family child care homes reported that all or most of the children in their care have some of their fees or tuition paid by a family member's employer, 30.8% of centers and 10.9% of homes report having "some" children who receive at least some fees or tuition paid by a family member's employer. Thus, 65.3% of centers and 80.7% of family child care homes serve no children with employer-paid fees or tuition.

Table A.52. Is your child care learning center associated with a business that provides referrals, subsidies, or incentives to employees who enroll their children with you?

		Type of Program Child Care Learning Centers
Yes	Number	336
	Percent	26.4
No	Number	939
	Percent	73.6
Total	Number	1,275
	Percent	100.0

Table A.53. What portion of the children at your center or home have some of their fees or tuition paid by their family's employer?

		Type of Program		
		Child Care Learning Centers	Family Child Care Homes	Total
All (90–100%)	Number	10	40	50
	Percent	0.8	3.5	2.1
Most (50%– 89%)	Number	39	56	95
	Percent	3.1	4.9	3.9
Some (1%– 49%)	Number	394	125	519
	Percent	30.8	10.9	21.4
None	Number	835	922	1,757
	Percent	65.3	80.7	72.6
Total	Number	1,278	1,143	2,421
	Percent	100.0	100.0	100.0

Impact of the Great Recession on Businesses in the Early Care and Education Industry

The Great Recession, described in Chapter 4, spanned the period of December 2007 to June 2009, but during the 2014–2015 survey period, Georgia's economy was still recovering. Table A.54 indicates that Georgia's child care learning centers and family child care homes experienced the recession in a variety of ways. Not surprisingly, both types of programs indicate that enrollment decreased due to the recession (63.8% of centers and 50.3% of homes). Due to less income from fewer children enrolled, programs postponed maintenance and repairs or improvements to the facilities and the replacement of toys, equipment, and materials. Some programs reported offering discounts and waiving late fees to help families and maintain enrollment.

Table A.54. How, if at all, did the recent economic downturn affect your program?

		Type of Program		
		Child Care Learning Centers	Family Child Care Homes	Total
Decreased enrollment	Number	829	580	1,409
	Percent	63.8	50.3	57.5
Put off improvements to building, playground, or driveway	Number	566	486	1,052
	Percent	43.6	42.2	42.9
Often waived late fees	Number	543	467	1,010
	Percent	41.8	40.5	41.2
Put off replacing toys, equipment, or materials	Number	533	471	1,004
	Percent	41.0	40.9	41.0
Put off some maintenance and repairs	Number	469	449	918
	Percent	36.1	39.0	37.5
Problems with staff morale	Number	396	N/A	396
	Percent	30.5	N/A	30.5
Offered more discounts to families	Number	394	343	737
	Percent	30.3	29.8	30.1
Amount of needed food increased (Children ate more, parents left children longer)	Number	255	291	546
	Percent	19.6	25.3	22.3
Cut rates	Number	214	302	516
	Percent	16.5	26.2	21.1
Put off training	Number	173	255	428
	Percent	13.3	22.1	17.5
Did not affect your program	Number	163	177	340
	Percent	12.5	15.4	13.9
Less staff turnover	Number	155	N/A	155
	Percent	11.9	N/A	11.9
Increased hours you were open during your standard week	Number	55	180	235
	Percent	4.2	15.6	9.6
Added weekend care	Number	N/A	85	85
	Percent	N/A	7.4	7.4
Other, please specify	Number	67	44	111
	Percent	5.2	3.8	4.5
Total	Number	1299	1152	2,451
	Percent	100.0	100.0	100.0

Signs of Recovery

Child care learning centers and family child care homes reported various signs of fiscal recovery since the recession; however, these are more prevalent for center- than family-based programs. Table A.55 indicates that for many child care learning centers, enrollment is beginning to recover: Enrollment has returned to its pre-downturn rate for some programs (18%) and returned "somewhat" for others (45.7%). The percentages are lower for family child care homes but indicate a gradual return: Enrollment has returned to pre-downturn levels for 14.2% and has returned "somewhat" for another 24.8%. More than 29% of centers and 18% of family child care homes have started making or have made building, playground, or driveway improvements, and similar percentages have been better able to maintain and repair facilities and equipment or replace toys, equipment, or materials.

Recovery from the recession has affected staff at centers: Their morale has reportedly improved (23.2%), but so has staff turnover (17.6%). Centers and homes alike have been able to winnow down some of the financial incentives they used during the recession by offering fewer discounts to families and waiving late fees less often.

Table A.55. In which ways has your center or home recovered from the recent economic downturn?

		Type of Program		
		Child Care Learning Centers	Family Child Care Homes	Total
Enrollment has returned somewhat	Number	500	282	782
	Percent	45.7	24.8	35.1
Started making or have made improvements to building, playground, or driveway	Number	325	208	533
	Percent	29.7	18.3	23.9
Able to replace toys, equipment, or materials	Number	314	209	523
	Percent	28.7	18.4	23.5
Staff morale has improved	Number	254	N/A	254
	Percent	23.2	N/A	23.2
Better able to maintain and repair facilities and equipment	Number	312	166	478
	Percent	28.5	14.6	21.4
Staff turnover has increased	Number	193	N/A	193
	Percent	17.6	N/A	17.6
Offer fewer discounts to families	Number	213	156	369
	Percent	19.5	13.7	16.6
Enrollment has returned to its pre-downturn level	Number	197	161	358
	Percent	18.0	14.2	16.1
Seldom waive late fees	Number	204	130	334
	Percent	18.6	11.5	15.0
Increased training	Number	203	114	317
	Percent	18.6	10.0	14.2
Raised rates to pre-downturn levels	Number	106	82	188
	Percent	9.7	7.2	8.4
Amount of needed food has returned to pre-downturn levels	Number	46	62	108
	Percent	4.2	5.5	4.8
Returned to pre-downturn schedule	Number	41	44	85
	Percent	3.7	3.9	3.8
Other, please specify	Number	61	77	138
	Percent	5.6	6.8	6.2
Total	Number	1,094	1,135	2,229
	Percent	100.0	100.0	100.0

Biggest Challenges or Obstacles to Business

Early care and education programs in Georgia face a variety of obstacles, ranging from staffing issues to low enrollment numbers to affording employee benefits. The top challenges or obstacles facing their businesses are similar in many respects and also differ due to the nature of each of their businesses. Table A.56 shows that over half (55.8%) of child care learning centers have trouble finding qualified staff. They face other staff-related challenges as well. Among family child care homes, the most commonly cited challenges are earning enough income (44.5%) and affording vacation, sick leave, or personal time (37.7%).

Table A.56. What are the three biggest challenges or obstacles to your business?

		Type of Program		
		Child Care Learning Centers	Family Child Care Homes	Total
Finding qualified staff	Number	686	N/A	686
	Percent	55.8	N/A	55.8
Earning enough income	Number	471	512	983
	Percent	38.3	44.5	41.3
Affording leave (vacation, sick leave and personal time, etc.)	Number	N/A	434	434
	Percent	N/A	37.7	37.7
Paying for employee benefits	Number	303	382	685
	Percent	24.6	33.2	28.8
Maintaining adequate enrollment	Number	406	277	683
	Percent	33.0	24.1	28.7
Retaining employees	Number	297	N/A	297
	Percent	24.1	N/A	24.1
Maintaining building-home, playgrounds and equipment	Number	295	247	542
	Percent	24.0	21.5	22.8
Ability to attend as much training as I would like	Number	N/A	246	246
	Percent	N/A	21.4	21.4
Learning and keeping up with new regulations	Number	268	204	472
	Percent	21.8	17.7	19.8
Buying adequate materials and equipment	Number	200	194	394
	Percent	16.3	16.9	16.6
Affording liability insurance	Number	107	192	299
	Percent	8.7	16.7	12.6
Competitive pricing	Number	127	126	253
	Percent	10.3	11.0	10.6
Technology	Number	156	83	239
	Percent	12.70	7.2	10.0
Language barriers*	Number	N/A	15	15
	Percent	N/A	1.3	1.3
Other, please specify	Number	53	32	85
	Percent	4.3	2.8	3.6

* For column 2, answers are pulled from question 22, part 9 on the survey for family child care homes.

Family child care homes, because their businesses are so dependent on the operator, were also asked about personal challenges they face in staying in the early care and education business. Earlier it was noted that 21.6% have retirement savings and 75.5% have health insurance (Table A.40). The crucial nature of these two benefits becomes apparent in Table A.57. Approximately 62% cited a need for retirement savings and 38.2% a need for affordable health insurance as the factors that most influence whether they will be able to stay in business.

Table A.57. What are your biggest personal challenges in staying in business?

		Type of Program Family Child Care Homes
Need for retirement savings	Number	712
	Percent	61.9
Ability to afford health insurance	Number	439
	Percent	38.2
Meeting the physical demands of the job	Number	275
	Percent	23.9
Meeting the social, emotional demands of the job	Number	259
	Percent	22.5
Other	Number	137
	Percent	11.9
Total	Number	1,150
	Percent	100.0

Programs' Opinions about Quality Rated

In January 2012, DECAL introduced the state's first comprehensive early care and education rating and improvement system, Quality Rated. With the launch of Quality Rated, Georgia joined more than 30 states and local communities that over the past decade have initiated quality rating and improvement systems as a means of promoting, measuring, and monitoring the quality of child care programs (Boller et al. 2015). Quality Rated uses credentialing standards and verification, process and structural standards, and environment rating assessments to rate early care and education programs. "Quality Rated is a systemic approach to assess, improve, and communicate the level of quality in early and school-age care and education programs" in Georgia (Georgia Department of Early Care and Learning 2015, p. 3). Similar to rating systems for other service-related industries, Quality Rated assigns a star rating (one, two, or three stars) to participating early care and education programs. As of October 2015, Quality Rated has assessed more than 800 programs statewide.

By August 2014, when DECAL prepared the survey recipient list of all licensed child care centers and family child care homes in the state, approximately 8% of the centers and 5% of the family child care homes had completed the application and review process and been accepted into the Quality Rated program. All questionnaires included in the early care and education survey contained three general questions about Quality Rated in order to assess the opinions of all programs about Quality Rated. Questionnaires sent to programs participating in Quality Rated contained five additional questions about their experiences with and opinions about Quality Rated. The rated programs had a disproportionately high rate of response. The following discussion provides insights about Quality Rated from the point of view of all center and family child care home respondents and then focuses on the opinions of the centers and homes that were early participants in Quality Rated. Note that Quality Rated has grown quickly since the survey was conducted. As of October 2015, more than 40% of licensed early care and education programs were participating in Quality Rated and over 15% had received a star rating.

Programs' Thoughts about Families in Relation to Quality Rated

All programs were asked how much they thought families knew about Quality Rated. Table A.58 indicates that at the time of the survey fewer than 20% of programs felt that their families were well-informed about the new rating system. Approximately a third (36.1%) of respondents evaluated families as knowing "a little" about Quality Rated, and 26.3% "a moderate amount." About a fifth (19.2%) of respondents assessed families as knowing nothing at all about the program.

Table A.58. How much do families know about Quality Rated?

		Type of Program		
		Child Care Learning Centers	Family Child Care Homes	Total
A great deal	Number	81	135	216
	Percent	6.3	11.9	8.9
A lot	Number	102	130	232
	Percent	7.9	11.4	9.5
A moderate amount	Number	336	304	640
	Percent	26.0	26.7	26.3
A little	Number	527	351	878
	Percent	40.7	30.8	36.1
Nothing at all	Number	248	219	467
	Percent	19.2	19.2	19.2
Total	Number	1294	1139	2433
	Percent	100.0	100.0	100.0

Child care learning centers and family child care homes differ on estimates of how willing their clients would be to pay more for Quality Rated. On average, each type of program estimated that families would be "somewhat" willing to pay more for Quality Rated child care (Table A.59). Yet nearly half of the centers (46.5%) posited that their families would be "not at all" willing to pay extra for Quality Rated child care, and more than half (53.5%) of family child care homes surmised that their families would be "somewhat" willing. The average assessments of each group differ statistically significantly.

Table A.59. How willing are your clients to pay more for Quality Rated child care?

		Type of Program		
		Child Care Learning Center	Family Child Care Homes	Total
Very willing	Number	119	172	291
	Percent	9.6	15.2	12.2
Somewhat willing	Number	547	605	1,152
	Percent	43.9	53.5	48.5
Not at all willing	Number	579	354	933
	Percent	46.5	31.3	39.3
Total	Number	1,245	1,131	2,376
	Percent	100.0	100.0	100.0

Quality Rated is voluntary for early care and education programs, but as the number of programs participating increases, programs are likely to feel the need to participate in order to stay competitive. Because Quality Rated was fairly new when the survey was distributed, the questionnaire asked why some programs might choose not to participate in the system. The largest groups of center- and home-based programs surmised that their peers may have not yet seen Quality Rated's benefits. Table A.60 also indicates that 33.8% of programs posited that their peers' time pressures had prevented their participation. Another 32.9% suggested that their peers were still preparing to meet the requirements to participate in Quality Rated.

In other answers, the most frequently mentioned other potential hurdles to participation include concerns that there would be additional costs, added regulations, and increased administrative work. Some asserted that Quality Rated's requirements would be incongruous with the type of program they use. Several home-based providers and a few center-based providers were concerned about having additional state involvement in their programs.

Table A.60. Why do you think some programs choose not to participate in Quality Rated?

		Type of Program: Child Care Learning Centers	Type of Program: Family Child Care Homes	Total
Are not ready, i.e. don't yet meet the requirements to participate	Number	515	299	814
	Percent	39.6	25.5	32.9
Don't have enough time	Number	462	373	835
	Percent	35.5	31.8	33.8
Don't know about it	Number	317	294	611
	Percent	24.4	25.1	24.7
Don't see the benefits of participating	Number	556	410	966
	Percent	42.7	35.0	39.0
Other, please specify	Number	190	117	307
	Percent	14.6	10.0	12.4
Don't know	Number	174	215	389
	Percent	13.4	18.3	15.7
Total	Number	1,301	1,173	2,474
	Percent	100.0	100.0	100.0

Opinions of Quality Rated Providers

Program Benefits

Although Quality Rated was in its early stages during the survey period, when asked how Quality Rated had benefitted their center or home, 51.4% of center-based and 60.2% of home-based respondents who were participating in the program at that time believed it was already improving teaching practices in their early care and education programs (Table A.61). An equal percentage of family-based respondents cited Quality Rated's contributions toward helping replace materials or equipment as a benefit, as did 44.1% of center-based respondents. The second-largest set of center-based respondents (45.8%) asserted that Quality Rated had influenced feelings of professionalism compared with 38.6% of family child care homes.

The third largest group of family child care homes (46.6%) reported that Quality Rated had been helpful in improving family engagement; 36.2% of centers agreed. Family-based providers (10.2%) were slightly more likely than centers (6.2%) to have seen no benefits to Quality Rated participation by the time of the survey.

Table A.61. How has participating in Quality Rated benefitted your center or home, or how do you expect it to benefit your center or home?

		Type of Program		
		Child Care Learning Centers	Family Child Care Homes	Total
Improves teaching practices	Number	91	53	144
	Percent	51.4	60.2	54.3
Helps in replacing materials/equipment	Number	78	53	131
	Percent	44.1	60.2	49.4
Staff-You and your assistants/ substitutes feel more professional	Number	81	34	115
	Percent	45.8	38.6	43.4
Improves family engagement	Number	64	41	105
	Percent	36.2	46.6	39.6
Tiered reimbursement helps us serve families	Number	67	28	95
	Percent	37.9	31.8	35.8
Helps recruit families	Number	60	34	94
	Percent	33.9	38.6	35.5
Center or home is more profitable	Number	18	18	36
	Percent	10.2	20.5	13.6
No benefits	Number	11	9	20
	Percent	6.2	10.2	7.50
Other, please specify	Number	4	5	9
	Percent	2.3	5.7	3.40
Total	Number	177	88	265
	Percent	100.0	100.0	100.0

Costs

Because participating in Quality Rated can have some related costs for programs, the survey asked the early Quality Rated providers about them. Table A.62 shows that child care learning centers (53.5%) and family child care homes (61.4%) were most likely to identify materials and equipment costs as one of the largest expenses associated with Quality Rated. Other costs varied because of the nature of the businesses of centers and homes. For centers, the second most frequently mentioned cost (45.3%) was higher salaries resulting from hiring more staff with higher qualifications, whereas family providers (39.8%) cited professional development as one of their top costs of participation. Nearly 34% of centers noted professional development costs as one of Quality Rated's largest costs.

Table A.62. What have been the two largest costs to your center or home as a result of participating in Quality Rated, or what do you expect the two largest costs will be?

		Type of Program		
		Child Care Learning Center	Family Child Care Home	Total
Materials/equipment	Number	92	54	146
	Percent	53.5	61.4	56.2
Professional development	Number	58	35	93
	Percent	33.7	39.8	35.8
Hired more staff with higher qualifications, therefore, salaries are higher	Number	78	9	87
	Percent	45.3	10.2	33.5
Increased number of staff or staff hours (Homes)	Number	39	7	46
	Percent	22.7	8.0	17.7
Renovations	Number	16	26	42
	Percent	9.3	29.5	16.2
Increased management oversight	Number	22	7	29
	Percent	12.8	8.0	11.2
Other, please specify	Number	3	5	8
	Percent	1.7	5.7	3.1
Total	Number	172	88	260
	Percent	100.0	100.0	100.0

Effects on Classrooms

Quality Rated respondents gave their opinions about how participating in the program had affected their classrooms as well. Table A.63 shows that more than 60% of center- and home-based programs indicated that their classrooms are better stocked with materials for children as a result of participating in Quality Rated. More than half of home-based respondents and more than 40% of center-based respondents felt that classroom spaces and furnishings are better arranged and organized to meet children's needs and that the classroom structure helps children spend more time engaged in purposeful activities. Nearly half of center-based (48.3%) and 31.8% of home-based respondents have seen an increase in teacher-child interactions with Quality Rated, and more than a third (36.3%) on average have more planned activities to engage families. Approximately 11% of both types of programs claimed that Quality Rated has not affected their classrooms.

Table A.63. How has participating in Quality Rated affected the classrooms in your center or home?

		Type of Program		
		Child Care Learning Center	Family Child Care Home	Total
Classrooms have more materials, books, displays, etc. for children	Number	106	60	166
	Percent	60.9	68.2	63.4
Classroom space and furnishings are better arranged and organized to meet children's needs	Number	81	54	135
	Percent	46.6	61.4	51.5
Classroom structure helps children spend more time engaged in purposeful activities	Number	76	45	121
	Percent	43.7	51.1	46.2
There is an increase in teacher-child interactions	Number	84	28	112
	Percent	48.3	31.8	42.7
There are more planned activities to engage families	Number	59	36	95
	Percent	33.9	40.9	36.3
Classroom climates are calmer with fewer discipline issues	Number	50	21	71
	Percent	28.7	23.9	27.1
Children interact with one another more than they did before	Number	31	26	57
	Percent	17.8	29.5	21.8
Children seem healthier; fewer absences due to illnesses	Number	28	18	46
	Percent	16.1	20.5	17.6
No effect	Number	18	10	28
	Percent	10.3	11.4	10.7
Other, please specify	Number	5	5	10
	Percent	2.9	5.7	3.8
Total	Number	174	88	262
	Percent	100.0	100.0	100.0

Effects on Staff

Sizable portions of providers appraised Quality Rated as having had some or all of the positive impacts listed in Table A.64 on early care and education staff. A majority, on average, of both centers and family child care homes assessed Quality Rated as having caused staff to take pride in their accomplishments (55.8%) and to have improved classroom environments (53.2%), teaching practices (52.8%), and teacher-child interactions (49.4%). No family child care homes and only 4% of child care learning centers contend they have witnessed no effects from participating in Quality Rated on their staff.

Table A.64. How has participating in Quality Rated affected your program's staff or you and your paid assistants/substitutes?

		Type of Program		
		Child Care Learning Center	Family Child Care Home	Total
Pride in their accomplishments	Number	95	53	148
	Percent	53.7	60.2	55.8
Improved classroom environment	Number	92	49	141
	Percent	52.0	55.7	53.2
Improved teaching practices	Number	89	51	140
	Percent	50.3	58.0	52.8
Improved teacher-child interactions	Number	89	42	131
	Percent	50.3	47.7	49.4
Improved health or safety practices	Number	79	35	114
	Percent	44.6	39.8	43.0
Improved relationships with families	Number	58	34	92
	Percent	32.8	38.6	34.7
Staff feel more stress	Number	61	18	79
	Percent	34.5	20.5	29.8
Increased enrollment in higher education or other professional development programs	Number	34	21	55
	Percent	19.2	23.9	20.8
No effect	Number	7	--	7
	Percent	4.0	--	4.0
Other, please specify	Number	5	2	7
	Percent	2.8	2.3	2.6
Total	Number	177	88	265
	Percent	100.0	100.0	100.0

Quality Rated's Benefits in Relation to Costs

Overall, Quality Rated respondents reported that the benefits of participating in the program exceed or equal the costs. Table A.65 shows that among center-based respondents, 44.4% evaluated benefits as exceeding costs, while 28.2% of family-based respondents did so. Family child care homes (30.6%) were more likely to see benefits and costs as approximately equal, whereas 22.5% of center-based respondents did. Roughly an average of 20% of respondents thought that the costs exceed benefits, and 15% believed it was too early to say.

Table A.65. Bottom line: How do the benefits and costs of Quality Rated compare?

		Type of Program		
		Child Care Learning Centers	Family Child Care Homes	Total
Benefits exceed costs	Number	75	24	99
	Percent	44.4	28.2	39.0
Benefits and costs are approximately equal	Number	38	26	64
	Percent	22.5	30.6	25.2
Costs exceed benefits	Number	35	18	53
	Percent	20.7	21.2	20.9
Too early in the program to say	Number	21	17	38
	Percent	12.4	20.0	15.0
Total	Number	169	85	254
	Percent	100.0	100.0	100.0

Summary of Providers' Opinions on Their Business and Quality Rated

- Roughly one-quarter of child care learning centers have an association with a business that provides referrals, subsidies, or incentives to employees who enroll their children with that center.
- More than 34% of centers and 19.3% of family child care homes have employer-supported fees or tuition for some to all of their children. The proportions receiving employer-supported fees for some of their children exceed the proportions of programs with most or all of their children covered by such fees. The remaining providers serve no such children.
- Decreased enrollment was the most commonly cited impact of the Great Recession among child care learning centers and family child care homes. Improved enrollment was the most commonly mentioned way in which programs are recovering from the recession.
- Finding qualified staff is the business challenge most frequently identified by child care learning centers, and affording leave is the biggest challenge for family child care homes. Both types of programs next cite earning enough income and maintaining adequate enrollment as their biggest challenges.
- For family child care home owners/operators, saving for retirement and finding affordable health insurance are personal challenges they face in staying in business.
- Early adopters of Quality Rated most frequently cited that the program has resulted in improved teaching practices and replacement of materials and equipment, or the programs expect it will.

- According to Quality Rated centers and family child care homes, the largest costs thus far have been in materials and equipment. Other costs include higher wages and professional development expenses.
- Child care learning centers and family child care homes participating in Quality Rated, on average, assess its benefits as approximately equal to its costs.