



TECHNICAL REPORT 12-057

Washington State 2012 Child Care Survey

Child Care Rate and Resources in Washington state

Fall 2012

Prepared for

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EXECUTIVE SUMMARY AND KEY RESULTS FROM THE CHILD CARE SURVEY

Findings about Child Care Population:

- An estimated 128,543 children in Washington were enrolled in licensed child care in the spring of 2012. About 80 percent of these children were in child care centers and the remaining 20 percent were in licensed family homes.
- Information from the child care survey was combined with the population data from Washington's Office of Financial Management to estimate the proportion of children of various ages in licensed care at the time of the child care surveys. Roughly 11 percent of children in Washington were estimated to be in care, with the proportions of children in care varying substantially by age group. Just over 7 percent of infants, 18 percent of toddlers, 25 percent of preschoolers, 13 percent of kindergarteners and 4 percent of school-age children were estimated to be in licensed care at the time of the survey in the spring 2012.

Findings about Child Care Centers:

- The total capacity for centers was 103,235 children. A total of 103,214 children were cared for in centers. The average capacity for centers was 69.1 children.
- The number of vacancies for centers was 19,825. Among centers with at least one vacancy, the average vacancy rate was 20 percent.
- Seventy percent of children in child care centers were in full-time care. Fifty-four percent of all children in full-time care were preschoolers and 20 percent were toddlers. Twenty-one percent of children in full-time care were older; 9 percent were kindergarten age and 12 percent were school-age. The remaining 5 percent of children in full-time care were infants.
- Thirty percent of children in child care centers were in part-time care. Twenty-seven percent were school-age children, while an additional 47 percent were preschoolers. Nine percent of children were kindergarten age and another 14 percent were toddlers. Only 3 percent were infants.
- Thirty-five percent of all child care centers were operated by or as non-profit organizations, 64.2 percent were private, for-profit businesses, 0.7 percent were government-run centers.
- Average hourly wage for employees at child care centers was \$9.94 for assistants, \$12.52 for teachers, \$14.65 for supervisors and \$15.31 for directors.

- The proportion of assistants newly hired was more than twice the proportion for teachers, which was 19.6 percent. Thirteen percent of supervisors were newly hired compared to 9 percent of directors newly hired after September 1, 2011.
- Less than 7.6 percent of survey participants from centers indicated they were uncomfortable calling their licensors.
- Eighty-one percent of center participants reported they received timely information on changes to licensing policies; 90.1 percent agreed that the licensor clearly explained the reasons behind the licensing regulations at the most recent licensing visit; and 93 percent believed that the licensor clearly explained what the center needed to do to comply with regulations.

Findings about Licensed Family Home:

- Family home providers cared for 25,329 children with total capacity in family homes at 39,136 children. The average capacity for a family home was 6.1 children.
- The number of vacancies for family homes was 9,596 with a vacancy rate of 24.5 percent
- Sixty-eight percent of children in child care provided in family homes were in full-time care. Preschoolers accounted for 52 percent of full-time attendance in family homes, followed by toddlers, accounting for 23 percent of children. School-age children made up 10 percent of children in full-time care, kindergarteners were 7 percent and infants were 8 percent of children in full-time care in family homes.
- In 2012, 60.7 percent of family homes received assistance from the U.S. Department of Agriculture (USDA) Child and Adult Care Food Program.
- Less than half (49 percent) of participants from family homes reported having liability insurance.
- Eleven percent of family home providers had a bachelor's or master's degree. Eight percent of family home owners reported having an associate degree in child development or a Child Development Associate (CDA) credential; less than 3 percent had a bachelor's or graduate degree in early childhood development.
- On average, a licensed family home provider's gross income was \$32,908. For 52.6 percent of family home providers, child care earnings were their

households' primary source of income; their average income (\$39,386) was considerably higher than family home providers with other income sources.

- The majority of family home participants had positive experiences with their licensors and said they had no hesitation in calling their licensors (87.3 percent), reported they received timely information on licensing policy changes (78.7 percent) and clear explanations (88.7 percent) and suggestions from their licensors (92.7 percent). About 7 percent of participants didn't feel that they were regarded as knowledgeable about and a professional in the field of child care by their licensors.

Findings about Special Needs Care:

- At the time of the survey, 56.3 percent of centers were providing care for children with special needs. One quarter of centers that did not currently provide special needs care, had previously. Eighteen percent of family homes currently or have provided special needs care.
- Twelve percent of centers and 6 percent of family homes received the special needs rate (level 1) and/or applied for and received a rate above the special needs rate (level 2) since July 1, 2011. About half, or 53 percent of centers and 44 percent of family homes, received the special needs rate after they applied for it since July 1, 2011.

Findings about Children with Subsidized Child Care:

- In 2012, an estimated 31,233 children received subsidies for child care in Washington: 10,557 children in licensed family homes, representing 41.7 percent of all children in family homes; and 20,676 children in child care centers, representing 20 percent of all children in centers.
- Seventy-nine percent of centers and 63.4 percent of family homes cared for children with child care subsidies.
- More than 41 percent of children in family homes and about 20 percent of children in centers received subsidized child care. On average, a family home cared for 2.6 children receiving subsidized child care, and centers cared for 19.8 children with subsidized child care over the last typical week of operation.

CHAPTER 1: INTRODUCTION

The Child Care and Development Fund (CCDF) is a federal block grant that helps families pay for child care in their communities. Grant rules require states to evaluate subsidy rates based on a child care market rate survey conducted every two years. CCDF dollars are used to:

- Offer child care subsidies to low-income families while parents work, look for work or are in approved job training.
- Improve the quality of child care available to families.
- Fund technical assistance from the federal Child Care Bureau to states and territories.
- Fund child care research and evaluation activities at the national, state and local levels.

In Washington, the state Department of Early Learning (DEL) has served as the lead agency for the CCDF since October 2007. DEL must submit a plan every two years to the federal Child Care Bureau that outlines how the state will use CCDF dollars. As the CCDF lead agency, DEL is required to conduct a market rate survey within two years of the effective date of its current approved plan. Therefore, DEL conducts a biennial study of child care providers to determine rates charged for care, the costs associated with running a child care business and the availability of child care across the six Child Care Subsidy Regions of the state.

DEL contracted with the Social and Economic Sciences Research Center (SESRC) at Washington State University to conduct the market rate study in 2012.

Additional objectives of the survey included determining:

- Availability of child care in the six Regions across the state
- Use of certain resources available to providers
- How and when providers operate their child care business
- Some of the costs associated with operating a child care business

Availability was determined by asking about licensed capacity, number of additional children the provider wanted to care for, and the number of children currently in care. Questions regarding the wages of staff, number of hours worked, and gross income were asked to determine the cost of running the business. Child care providers were asked about hours of operation and how fees and copays were collected.

The distribution of counties among Child Care Subsidy Regions is shown in figure A and Table 1.

Figure A: DSHS Administrative Regions

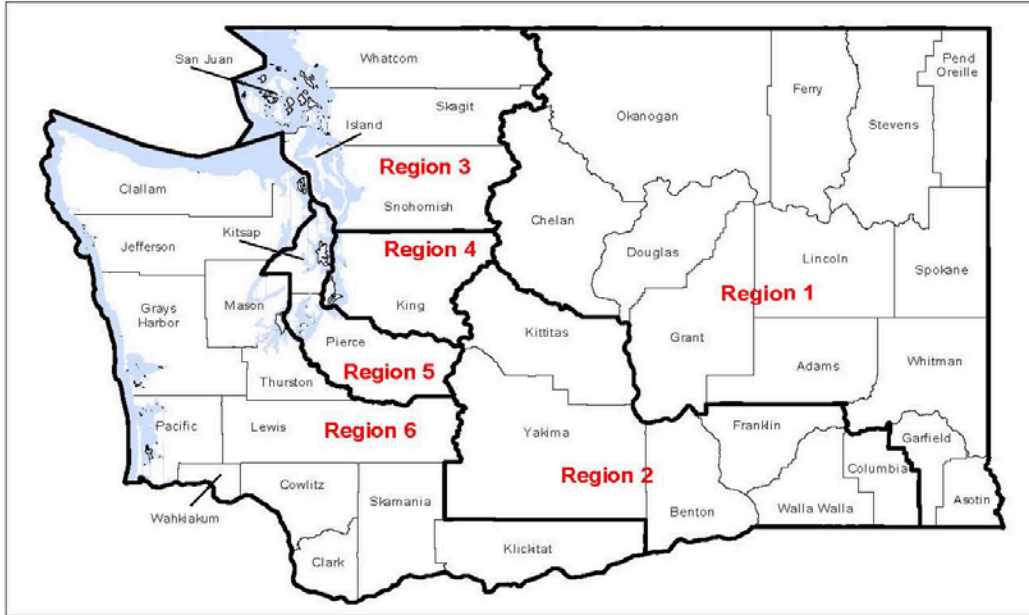


Table 1: Washington State Counties by Child Care Subsidy Region, 2012

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

Methodology

Survey

The Social and Economic Sciences Research Center (SESRC) at Washington State University conducted the multi-mode (telephone, web and mail) survey of child care facilities for DEL from May to July 2012. The population for the Washington 2012 Child Care Survey consisted of all 1,542 licensed child care centers, and 2,857 of the 4,435 family home child care providers licensed in Washington as of May 2012. Two surveys were designed, one for child care centers and the other for family homes.

Among the 1,542 child care centers, SESRC identified 256 sites that belonged to one of 19 multiple-site centers. The SESRC called the “lead center” for each of the 19 multi-site centers before the survey to determine if there was a single director in charge of the centers. If the multiple-site center was determined to have a single director, this director was sent a paper questionnaire that allowed him or her to fill out information for all the sites of responsibility. Follow-up calls were made as the survey progressed to encourage the multiple-site directors to return these surveys. If the multiple-site centers had separate directors, they were contacted individually.

For the family home child care providers, the sample was selected in direct proportion to the number of licensed providers within each region of the state. If a region did not have enough providers for an appropriate sample, then all providers from that region were included in the sample.

DEL staff members compared previous studies to determine changes to the interview script and worked with SESRC to design a multi-mode survey. Telephone and web modes were offered to both the center and family home providers; and a written, self-administered (mailed) questionnaire was offered only to multiple-site center directors. Each mode contained similar questions with only minor wording differences that were based on whether the survey would be heard (phone) or read (Internet and mailed).

Different survey protocols were implemented based on whether each respondent was part of the single center group, a multiple-site group or a family home child care provider.

Single Site and Family Home Providers

Before the telephone calls began, centers and family home providers were sent a prior notification, a reply card, a business reply envelope, and a worksheet to prepare the respondent for the survey in advance. The notification, with slight wording differences for centers and family home providers, informed the providers that a telephone survey was being conducted, the purpose of the study, and the expected length. Providers were given the option of completing the survey online. The letter informed providers that responses were voluntary and confidential. In addition, the letter explained by returning the enclosed reply card or completing the web survey, participants would be entered in a drawing for a \$100 grocery gift certificate. The reply card allowed providers to update their phone numbers and request the times they would prefer to be called. The card also included a check box to indicate if a child care provider no longer provided care. All documents were translated into Spanish by an SESRC translator. Spanish was printed on the reverse side of the English documents.

All letters were printed on DEL stationary and placed in envelopes with a business reply envelope with return labels showing the client's name but SESRC's address. SESRC printed all documents and assembled the mailing. The assembled letters were mailed from DEL on May 24, 2012.

The full telephone study began May 29, 2012, and was completed on July 23, 2012. All active cases received a minimum of five call attempts. The average completed interview length was 24 minutes for centers and 26.6 minutes for family home care providers.

Multiple-Site Pre-Call

SESRC conducted a series of calls with centers that appeared to have multiple sites. These calls were to verify that a single director was in charge of the associated sites and to identify the mailing address for survey materials. In addition, several multiple site centers were identified during the course of calling. Paper questionnaires were prepared and mailed to these sites by SESRC. A series of follow-up calls were made to encourage the directors of the multiple-site centers to complete the survey and mail it back to the SESRC using the business reply envelope that was included in the mailing.

Multiple-Site Mail Questionnaire

The questionnaire was formatted into an 11x17 inch booklet and was customized for the lead center of each multiple site. If the lead center indicated there were a total of 12 sites, the names of those 12 sites became rows in each table in the questionnaire. If the center only had two sites, the table only contained two rows. The mailing included a cover letter giving instructions on how to fill out the questionnaire and the deadline for returning the questionnaire.

An initial mailing took place on June 11, 2012. Surveys were sent to 10 directors of multiple sites with a request to return surveys by June 20. Final contacts – in the form of the phone follow-up calls (both reminder and survey calls) – were conducted July 9-13 2012. Whenever a multiple-site director was identified during the course of calling single centers, additional mailings were sent out as necessary. A total of 0 more directors of multiple sites were identified during the course of calling the single site centers; therefore, the total number of directors of multiple sites was 10.

Outcome of Survey

Response Rate

A total of 1,542 child care centers were contacted for this survey and 1,058 completed questionnaires were obtained. Of these, 545 were completed by telephone, 32 were mailed and 481 were completed online. A total of 10 out of the 19 multiple site lead centers were sent the written survey, encompassing a total of 80 sites. The 9 multiple site centers that were not sent written surveys were added in to the phone sample for normal calling. In addition, 48 centers partially completed questionnaires and were included in the response rate calculation. Response rates for the multiple site centers was, 4 completed questionnaires returned (40 percent of those mailed), which covered 32 sites (40 percent of all sites in the mailings). A total of 48 out of the 1,542 centers were considered ineligible (including non-working numbers, no longer in business, does not provide care and duplicate numbers) and were excluded from the response rate calculation. The overall response rate was 75.4 percent.

A total of 2,857 family home child care providers from a population of 4,435 were contacted for this survey, and 1,411 completed questionnaires were obtained. Of these, 996 were completed by telephone and 415 were completed online. 103 family homes partially completed the questionnaire and were included in the response rate calculation. A total of 352 out of the 2,857 family homes were considered ineligible (including non-working numbers, no longer in business, does not provide care and duplicate numbers) and were excluded from the response rate calculation. The overall response rate for the family home provider survey was 60.8 percent.

The following table displays the AAPOR¹ response rate (AAPOR response rate 4) calculations for all completed and partially completed questionnaires.

¹ AAPOR is the American Association for Public Opinion Research and is recognized as the leader for establishing industry standards for reporting of response rates.

Table 2. Response Rate for Centers and Family Home Providers

	Centers		Family Home Providers	
	#	%	#	%
(I) Completed Interviews	1,058	68.6%	1,411	49.4%
(P) Partial Completes	48	3.1%	103	3.6%
(R) Refusals	96	6.2%	200	7%
(NC) Non-contact ²	206	13.4%	623	21.8%
(O) Other ³	5	0.3%	66	2.3%
(UH) Unknown Household ⁴	57	3.7%	102	3.8%
Subtotal 1 (included)	1,470	95.3%	2,505	87.7%
Non-working Numbers ⁵	19	1.2%	164	5.7%
Electronic Device	5	0.3%	12	0.4%
Ineligible ⁶	48	3.1%	176	6.2%
Subtotal 2 (excluded)	72	4.7%	352	12.3%
Total Sample	1,542	100%	2,857	100%
Cooperation Rate: (I+P)/(I+P+R)	92%		88.3%	
Response Rate: RR4=(I+P)/(I+P+R+O+(e ⁷ *UH))	75.4%		60.8%	

² Non-contacts, respondents not available during project timeframe, answering machines

³ Language problems

⁴ Always busy, no answer, blocked calls

⁵ Disconnected, out of service, missing phone numbers and no new number available

⁶ Ineligibles including no longer in business, does not provide care, and duplicate numbers

⁷ e is the estimated proportion of cases of unknown eligibility that are eligible

Sample Error

The survey results for centers have no sample error since the entire population of licensed child care centers in Washington was included in the survey. For the family home child care providers survey, completed interviews were obtained from 1,411 (both phone and online) of 4,435 licensed family child care providers in Washington, yielding a margin of error of about ± 2.2 percentage points at the 95 percent confidence level.

Procedures for Calculating Population Estimates

Population estimates for this report were based on the weighted results of the survey data. Responses from 1,058 fully completed child care center surveys were weighted to represent a population of 1,494 child care centers throughout the state. Responses from 1,411 fully completed family home surveys were weighted to represent a population of 4,162 family homes throughout the state. Thus each completed child care center survey represents about 1.4 child care centers in the state population; and each completed family home child care survey represents about 2.9 family homes in the state.

CHAPTER 2: CHILD CARE POPULATION

Based on the surveys conducted from May through July 2012, estimated 128,543 children in Washington were in licensed care during that time. In-home care provided in the child's home or in the home of a relative is exempt from licensing and was not part of this study.

About 80 percent of the children were in child care centers and the remaining 20 percent were in licensed family homes. Centers provided care for 103,214 children and employed 19,511 staff at 1,494 licensed facilities. Family home child care providers cared for 25,329 children and employed 935 paid staff (not including the family child care owner) at 4,162 family homes. Both the number of children in licensed care and the number of licensed facilities had decreased for centers and family homes since 2010. The number of employees both at centers and family homes (not including family child care owner), has decreased since 2012.

Table 3: Children in Care, Employees and Licensed Child Care Facilities by Type of Facility, 2012

	Children in Licensed Care	Employees	Licensed Facilities
Centers	103,214	19,511	1,494
Family Homes	25,329	935*	4,162
Total	128,543	20,446	5,656

* Does NOT include family care owner

Family homes outnumbered centers by a factor of 2.78. There were six times as many homes as there were centers providing child care in Region 2. Even in Region 6, which had the closest ratio of family homes and centers, the ratio was 2.

Table 4: Licensed Child Care Facilities by Region, 2012

Region	Centers	Homes	Ratio of Homes to Centers
1	198	664	3.35
2	119	743	6.24
3	213	608	2.85
4	485	1085	2.23
5	216	510	2.36
6	263	552	2.10
Total	1494	4162	2.78

Number of Children in Care, Capacity and Vacancies in Child Care

Seventy percent of children enrolled in centers received full-time care; Sixty-eight percent of children at family homes attended on a full-time basis. The average capacity for centers was 69 children and 6.1 children for family homes. The total capacity was 99,213 in centers and 39,136 in family homes; both showed a decrease since 2012. The number of vacancies in centers and family homes combined was 29,421. The 25 percent vacancy rate for family homes declined, nearing the rate for centers which was 20 percent. The vacancy rate for centers in 2012 was 4 percent higher than the 2010 rate which was 16.09 percent.

Table 5: Children in Care, Capacity, Vacancies, and Vacancy Rate by Type of Facilities and Full-Time Versus Part-Time Enrollment, 2012

	Children Enrolled	Average Capacity	Total Capacity	Number of Vacancies	Vacancy Rate
Centers					
Full-time*	72,264				
Part-time	30,950				
Total in Centers	103,214	69.1	103,235**	19,825	19.98%***
Family Homes					
Full-time*^	17,344				
Part-time^	7,985				
Total in Homes	25,329	6.1	39,136	9,596	24.52%
Total	128,543	22.7	138,349	29,421	21.27%

* full-time care is at least 25 hours a week

^ Since only a total number of children were reported for each home, full and part time attendance had to be calculated from the hours of the individual children in each home. These totals occasionally totaled to a number fewer than the reported total number of children in care. Calculations were adjusted by proportion to the overall total based on the number of reported full and part time children in order to match the overall reported total.

** Average Capacity times number of centers (1,494)

*** Value is 25% greater than rate for 2010

In 2012, there were 89,608 children in full-time care. Center care was used by 72,264, or 81 percent, of those children and 17,344 or 19 percent used family homes care. There were 38,934 children in part-time care, 30,949 or 79 percent in centers and 7,985 or 21 percent in family homes.

Centers were estimated to provide full-time care for 3,643 infants, 14,634 toddlers, 38,888 preschoolers, 6,685 kindergarteners and 8,415 school-age children in 2012. Centers were also estimated to provide part-time care for 895 infants, 4,404 toddlers, 14,688 preschoolers, 2,662 kindergarteners and 8,300 school-age children in 2012. In addition, centers had the highest number of vacancies for preschool children (7,831 children) and only 1,278 vacancies for infants.

Family homes provided full-time care for 3,610 children who were less than two years of age and for 13,734 children who were two years of age or older. Family homes also provided part-time care for 1,038 children who were less than two years of age and for 6,947 children who were two years of age or older. There were 5,180 vacancies for children who were two years old or older in family homes while only 4,416 vacancies for children who were less than two years of age.

Table 6: Estimated Number of Full-Time Versus Part-Time Children Enrolled in Child Care, and Vacancies by type of Facility and Age Group, 2012

	Full-Time Enrolled	Part-Time Enrolled	Number of Vacancies
Centers			
Infant	3,643	895	1,278
Toddler	14,634	4,404	4,207
Preschooler	38,888	14,688	7,831
Kindergartener	6,685	2,662	2,557
School-Age	8,415	8,300	3,952
Total for Centers	72,264	30,949	19,825
Family Homes			
Children < 2 years	3,610	1,038	4,416
Children 2 or Older	13,734	6,947	5,180
Total for Family Homes	17,344	7,985	9,596
Total	89,608	38,934	29,421

The projected number and related proportion of children in Washington, as available through the state Office of Fiscal Management (OFM) for 2010 (www.ofm.wa.gov/pop/april1/default.asp), are presented in columns (A) and (B) of Table 7. Estimates of the number and proportion of children in licensed care, as derived from the 2012 Child Care Survey, are listed in columns (C) and (D). Column (E) displays the proportion of children in licensed care throughout the state.

Roughly one-in-nine or 11.34 percent of children in Washington were estimated to be in licensed child care, with the proportions of children in care varying substantially by age group. About 7 percent of infants, 18 percent of toddlers, and 13 percent of kindergarteners were in licensed care. Preschoolers represented the age group with the largest number and proportion (24.82 percent) of the population of children in care while school-age children represented the age group with the smallest proportion (3.79 percent).

Table 7: All Children in Washington State Age < 13 Years and Children in Licensed Care by Age Group, 2012

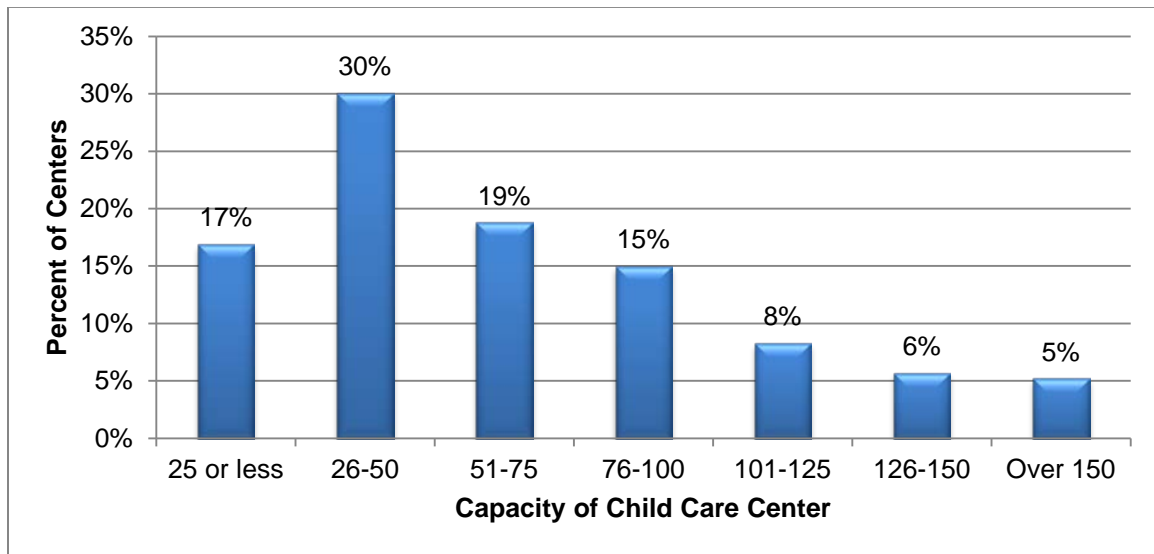
	(A) Pop Est < 13 Years	(B) A % of Pop	(C) Est # of Child in Lic Care	(D) Age Group as % of Col C Total	(E) C/A % of Age Group in Lic Care
Infant	87,931	7.76%	6,351	4.94%	7.22%
Toddler	131,897	11.64%	24,171	18.80%	18.33%
Preschooler	262,816	23.19%	65,233	50.75%	24.82%
Kindergarten	85,975	7.59%	11,384	8.86%	13.24%
School-Age	564,778	49.83%	21,403	16.65%	3.79%
Total < 13 Years	1,133,398	100%	128,543	100%	11.34%

CHAPTER 3: CHILDREN IN LICENSED CARE – CENTERS

Capacities

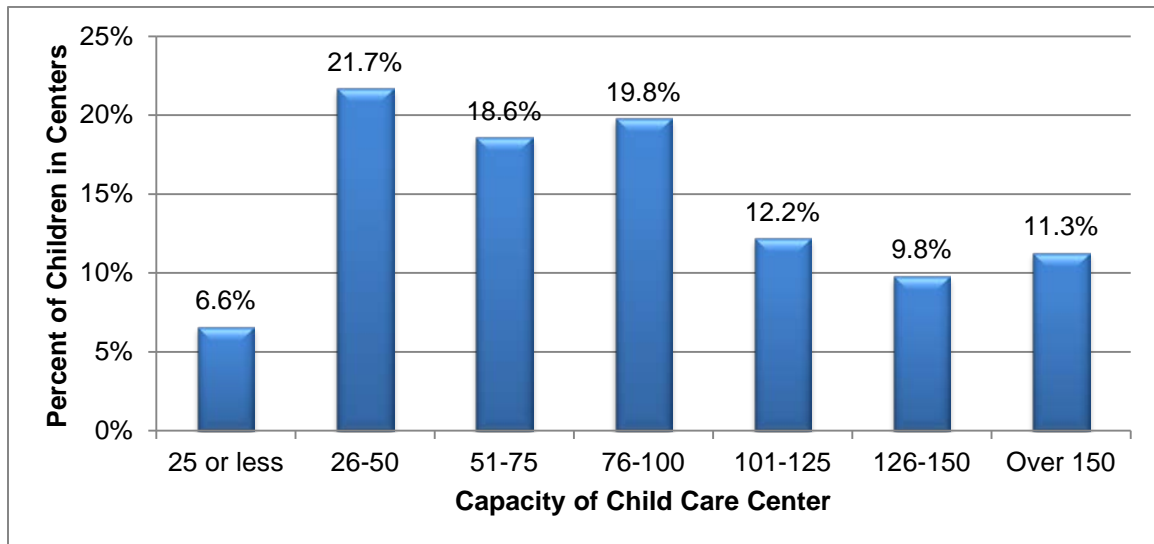
Just under half (47 percent) of centers had a capacity of 50 children or less. Just under a fifth (19 percent) had a capacity of 51-75, while 15 percent had a capacity for 76-100 children. The remaining 19 percent of centers reported having a capacity of more than 100 children.

Figure 1: Distribution of Child Care Centers by Capacity, 2012



The distribution of children in child care centers by center capacity, was; small (less than 50) 28.3 percent, mid-sized (51-100 children); 38.4 percent, and large centers (more than 100) 33.3 percent.

Figure 2: Distribution of Children in Child Care Centers by Capacity, 2012*

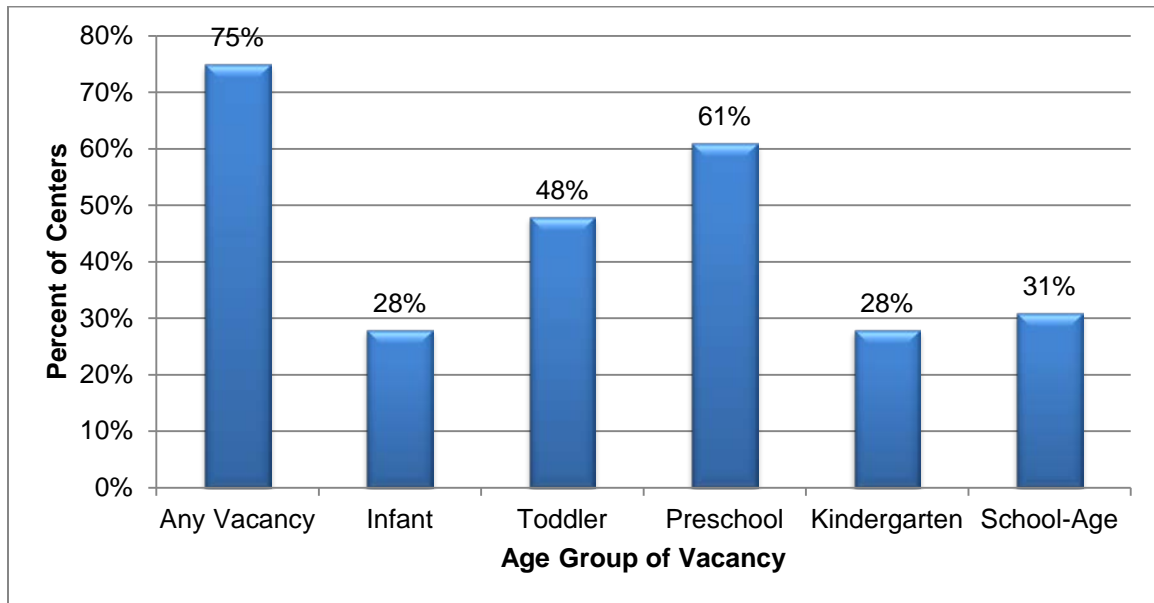


* Chart columns are based on capacity. The percent is based on the total number of children in center care = 103214

Vacancies

Three quarters, or 75 percent, of centers indicated they had vacancies. Vacancies for preschool children were reported by 61 percent of centers; a higher proportion than for any other age group. Only 28 percent of centers reported that they could enroll additional infants. The vacancy rate for toddlers was 48 percent while the vacancy rate for kindergarteners was 28 percent and 31 percent for school-age children.

Figure 3: Percent of Centers with Vacancies by Age Group, 2012



Overall, 75 percent of centers had at least one vacancy. However, when looking at differences in vacancies by region, Region 4 had proportionately fewer centers with vacancies in all age categories. This region is King county exclusively. In Region 4, only 21 percent of centers had vacancy for kindergarteners, which was the lowest proportion across all regions and age groups. Other vacancy rates in Region 4 ranged from 22 percent to 35 percent across the other age groups.

Regions 2 and 5 had the highest vacancy rates among centers with vacancies in almost all age groups. Vacancy rates in Region 2 ranged from 30 percent for kindergarteners to 65 percent for preschool age. Vacancy rates for Region 5 ranged from 30 percent for kindergarteners to 71.3 percent for preschool age.

Table 8: Percent of Centers with Vacancies by Age Group and Region, 2012

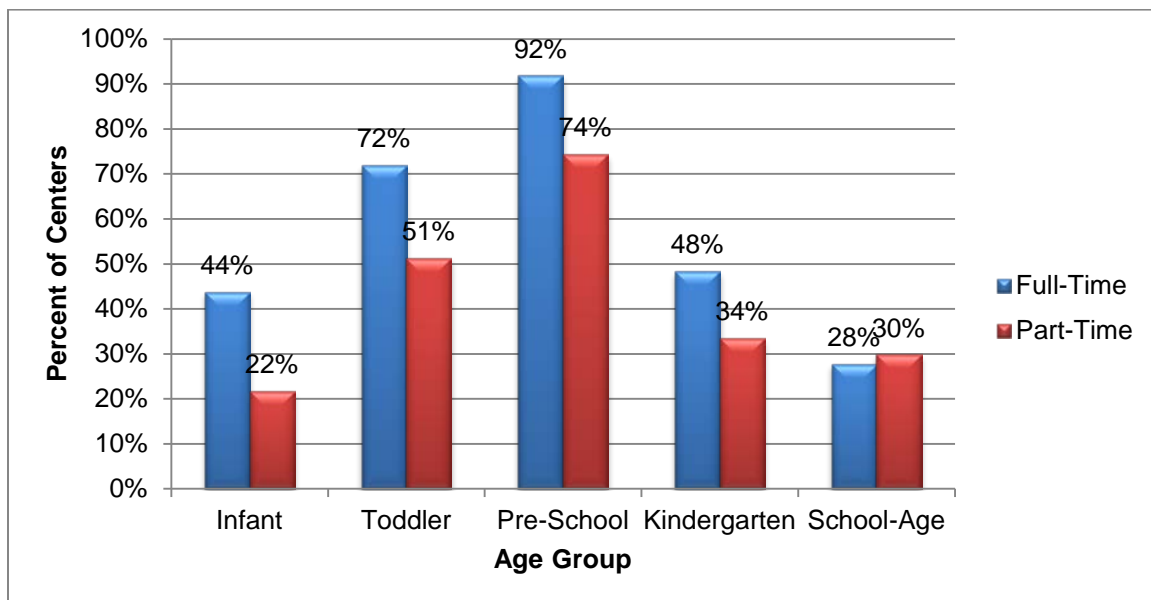
Region	Any Vacancies	Infant	Toddler	Preschool	Kindergarten	School-Age
1	72.0%	27.8%	47.1%	52.1%	31.4%	30.0%
2	80.7%	33.2%	54.6%	65.3%	29.7%	33.2%
3	77.6%	27.2%	52.4%	66.3%	32.5%	29.2%
4	67.7%	22.1%	34.9%	52.0%	21.2%	26.1%
5	83.7%	36.0%	58.2%	71.3%	30.1%	36.0%
6	79.5%	29.0%	55.3%	66.6%	33.8%	37.6%
Total	75.1%	27.7%	47.5%	60.5%	28.3%	31.1%

Full-Time and Part-Time Care in Centers by Age Category

Ninety-two percent of centers were providing full-time care for preschool children, and 72 percent were providing full-time care for toddlers. Fewer centers were providing full-time care for older children, with 48 percent providing full-time care for children in kindergarten and 28 percent providing full-time care for school-age children. Finally, 44 percent of centers were providing full-time care for infants. In all age categories except school-age, higher percentages of centers were providing full-time care compared to part-time care.

Almost three-quarters, 74 percent of centers, were providing part-time care for preschoolers. Fifty-one percent of centers were providing part-time child care for toddlers, and 34 percent were providing part-time care for children in kindergarten. Thirty percent were providing part-time care for school age children, and 22 percent of centers were providing part-time care for infants.

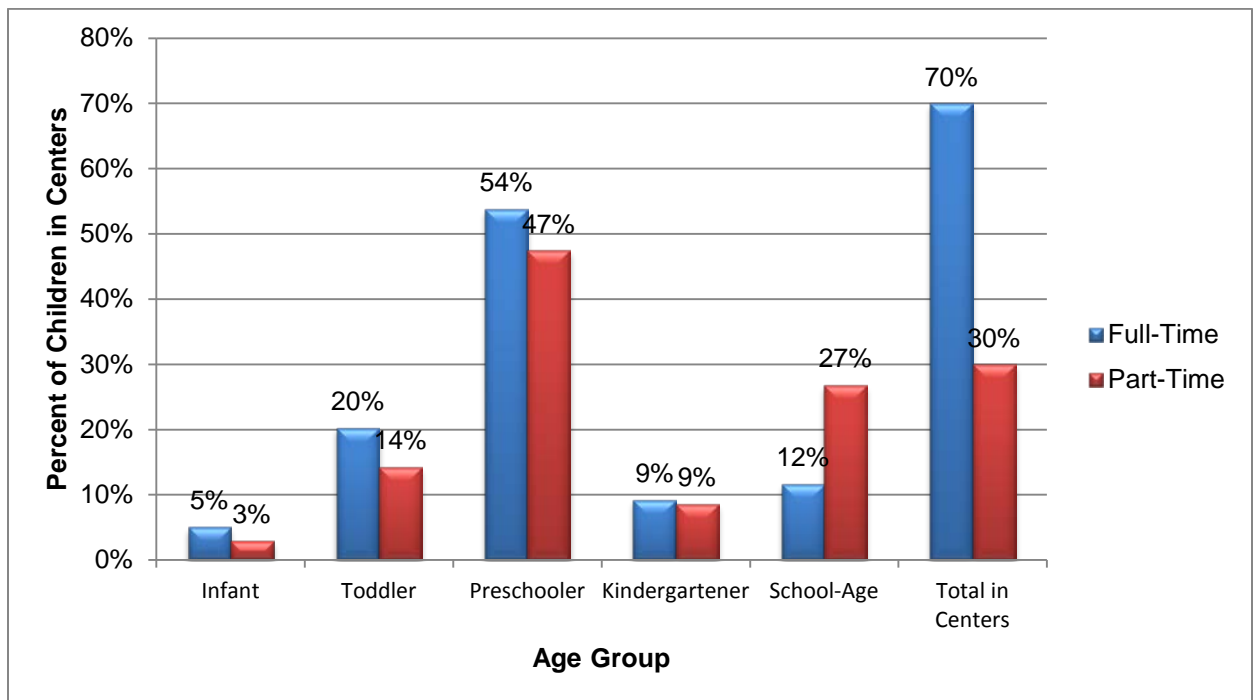
Figure 4: Centers Providing Full-Time and Part-Time Care by Age Group, 2012



Seventy percent of children in child care were in full-time care while 30 percent were in part-time care. Of all the children in full-time care, 20 percent were toddlers, 54 percent were preschoolers, 9 percent were kindergarten age, and 12 percent were school-age. The remaining 5 percent of children in full-time care were infants.

Among all children in part-time care, 27 percent, were school-age children, while 47 percent, were preschoolers. Only 9 percent of children in part-time care were kindergarten age and another 14 percent were toddlers. The remaining 3 percent were infants.

Figure 5: Distribution of Children in Centers in Full-Time and Part-Time Care by Age Group, 2012



When examining the population of children enrolled in centers by Child Care Subsidy Region and age group, Region 4 had the highest number of children receiving full-time or part-time care. Region 2 had the lowest number of children receiving full-time or part-time care.

Table 9: Child Care Center Population by Region and Age Group, 2012

	Region						All
	1	2	3	4	5	6	
<i>Full-Time</i>							
Infant	439	247	546	1391	463	556	3642
Toddler	1829	959	2055	6143	1689	1960	14635
Preschooler	3975	2269	4945	18145	4544	5009	38888
Kindergartener	1647	321	798	1896	812	1212	6686
School-Age	705	659	1767	3068	1330	885	8414
Total for Full-Time	8595	4455	10111	30643	8838	9622	72265
<i>Part-Time</i>							
Infant	182	59	126	215	147	167	896
Toddler	729	273	774	1260	614	755	4405
Preschooler	2131	538	2074	5370	1563	3011	14687
Kindergartener	309	189	364	986	270	544	2662
School-Age	1116	731	580	2516	1166	2190	8299
Total for Part-Time	4467	1790	3918	10347	3760	6667	30949

Centers were asked if they provided before and after-school care and if they offered summer care for school-age children. If so, they were asked how many part-time and full-time school-age children they anticipated for summer. Fifty-six percent of centers offered before and after-school care during the school year, and 62 percent planned to offer care for school-age children in the summer. Centers planning to provide summer care for school-age children, anticipated having an average of 17.9 full-time children and an average of 5.1 part-time children.

Table 10: Anticipated Average Number of Full-Time, School-Age Children Enrolled in Before and After School and Summer Care among Centers, 2012

	Percent	Anticipated Average # of Full-Time School-Age Children	Anticipated Average # of Part-Time School-Age Children
Provide Before and After School Child Care for School-Age Children	56.6%	--	--
Provide Summer Child Care for School-Age Children	62.5%	17.9	5.1

CHAPTER 4: CHILDREN IN LICENSED CARE – FAMILY HOMES

Vacancies

To estimate vacancies, family home providers were asked how many openings they had for children of any age, and more specifically, the number of openings for children under age two. More than half of family child care providers, 61.2 percent had at least one vacancy compared to 75.1 percent of centers (Table 8).

Compared to the other regions, Region 6 had the fewest vacancies for children under two years old in family homes at 42.2 percent. On average, in Regions 2 and 4, child care for children less than two years of age was available in at least 1 out of 2 family homes providing infant care. The highest vacancy rate for children younger than two years old occurred in Regions 2 and 4, with 54.8 percent and 53.8 percent vacancy rates respectively.

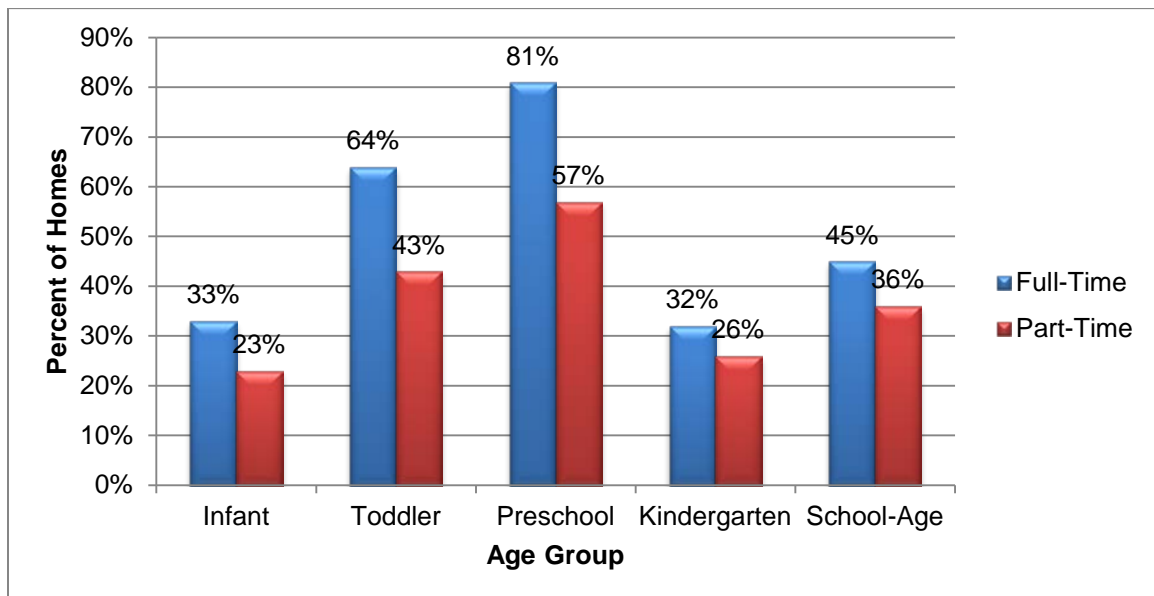
Table 11: Family Homes with Vacancies by Region, 2012

Region	Children < 2 Years	Any Vacancies
1	43.5%	55.6%
2	54.8%	65.9%
3	43.3%	58.7%
4	53.8%	64.4%
5	43.3%	60.1%
6	42.2%	59.3%
All	48.0%	61.2%

Full-Time and Part-Time Care in Family Homes by Age Category

Eighty-one percent of family homes provided full-time care for preschool children, and 64 percent provided full-time care for toddlers. In contrast, 45 percent provided full-time care for school-age children, and 32 percent provided full-time care for children of kindergarten age. Thirty-three percent provided full-time care for infants. Fewer family child care providers provided part-time care than full-time care for each age group. While 36 percent of family child care providers provided part-time care for school-age children, 26 percent provided part-time care for the kindergarten age group. Similarly, 57 percent provided part-time care for preschools, and 43 percent provided part-time care for toddlers. Only 23 percent provided part-time care for infants.

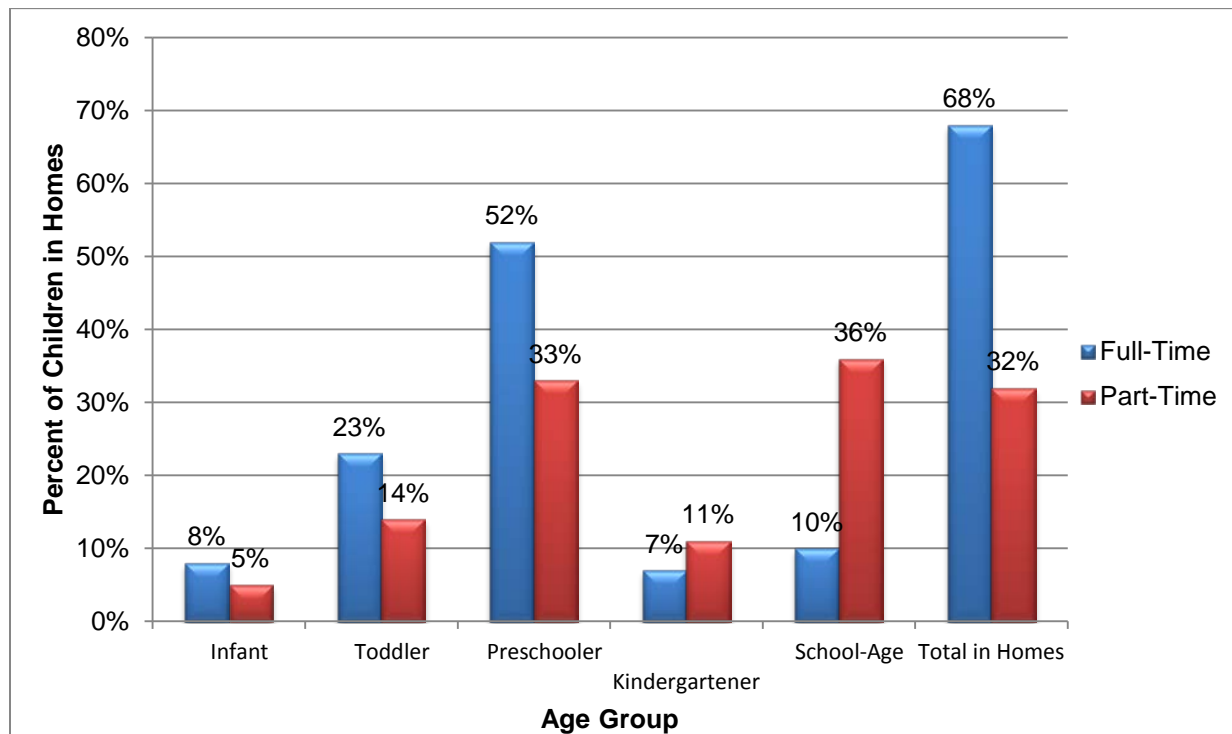
Figure 6: Family Homes Providing Full-Time and Part-time Care by Age Group, 2012



In family child care homes, full-time care for infants, toddlers and preschoolers was more prevalent than part-time care. Kindergarten and school-age children were more likely to be enrolled in part-time care. Preschoolers accounted for 52 percent of full-time attendance and toddlers 23 percent. In contrast, school-age children made up only 10 percent, kindergarteners 7 percent, and infants 8 percent of children in full-time care in family homes. The result of the highest and lowest proportion was similar to that of the centers.

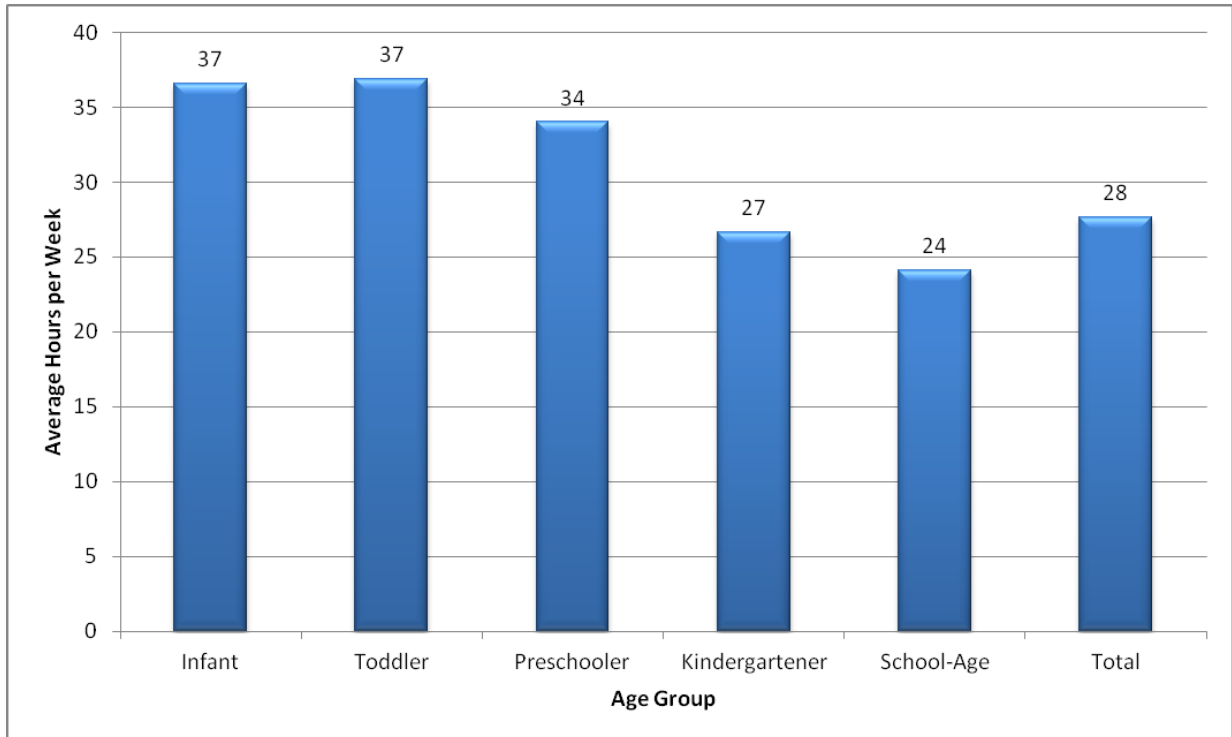
When compared to the number of children in full-time care, fewer children across all age groups were in part-time care provided in family homes except for kindergarteners and school-age children. In family child care homes, school-age children accounted for 36 percent and kindergarteners 11 percent of all children in part-time care. Preschoolers accounted 33 percent of children, toddlers for 14 percent, and infants for 5 percent of all children in part-time care provided in family homes.

Figure 7: Distribution of Children in Family Homes in Full-Time or Part-Time Care, 2012



On average, children received care in family homes for at least 28 hours. School-age children received 24 hours of care in family homes per week and kindergarteners received 27. Toddlers and infants spent the most time, 37 hours each, and preschoolers spent 34 hours in care provided by family home providers in a typical week.

Figure 8: Average Hours per Week in Family Home Care by Age Group, 2012



Providers in Region 4 cared for the most full-time and part-time children, 4,310 and 2,094 respectively. Providers in Region 6 cared for the fewest full-time children and Region 2 cared for the fewest part-time children, 2,232 and 867 respectively.

Table 12: Family Home Population by Region and Age Group, 2012

	Region						All
	1	2	3	4	5	6	
<i>Full-Time</i>							
Infant	218	295	192	315	204	186	1410
Toddler	673	619	578	1094	507	546	4016
Preschooler	1,475	1,451	1,404	2,273	1,206	1,186	8,994
Kindergartener	209	195	133	218	221	168	1144
School-Age	469	398	168	410	189	147	1781
Total for Full-Time	3,043	2,957	2,474	4,310	2,326	2,232	17,344
<i>Part-Time</i>							
Infant	59	32	56	130	59	68	404
Toddler	133	103	195	316	159	212	1,117
Preschooler	386	224	496	723	339	496	2,663
Kindergartener	139	142	156	186	150	121	894
School-Age	381	366	428	740	487	507	2,908
Total for Part-Time	1,097	867	1,330	2,094	1,193	1,403	7,985

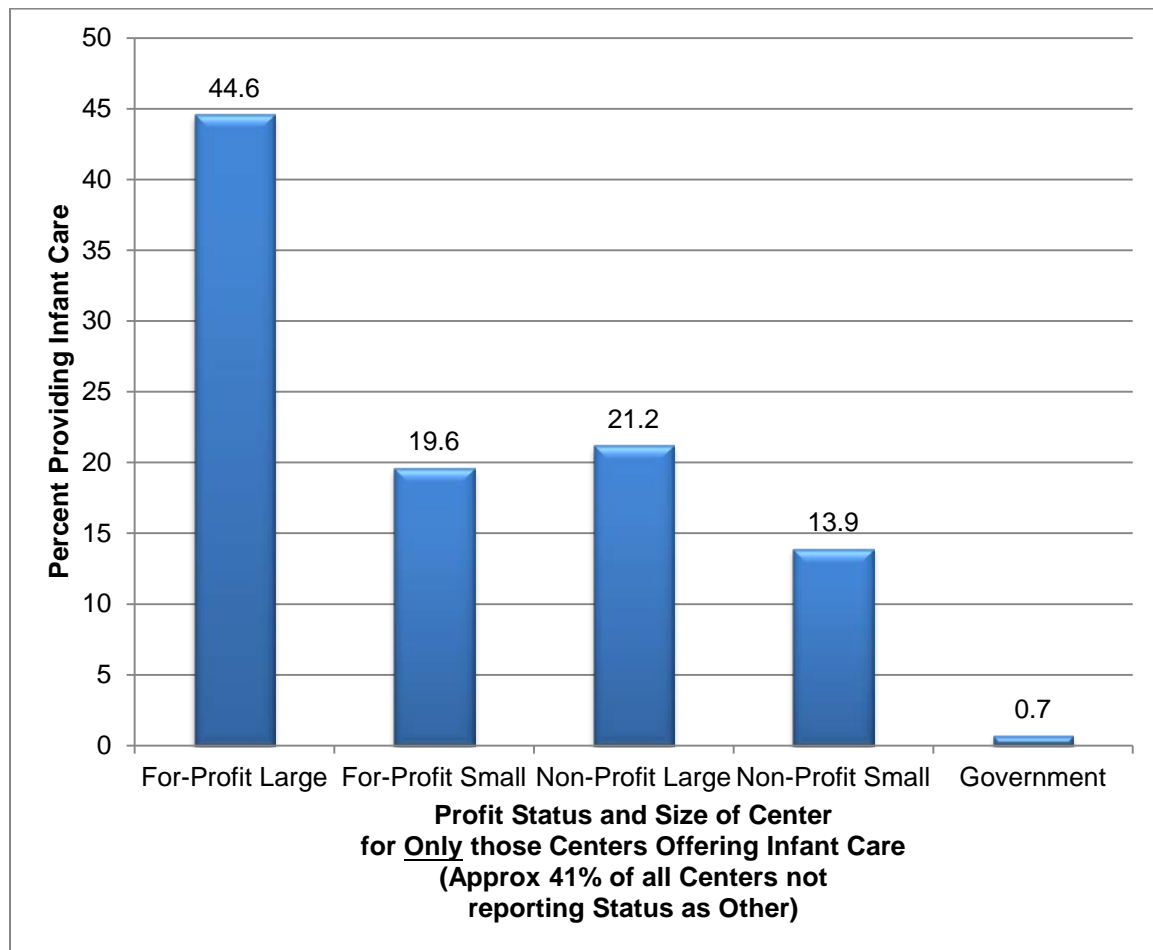
CHAPTER 5: PROFIT STATUS AND INFANT AND SCHOOL-AGE CARE AMONG CENTERS

Type of Center and Specialization

Differences in the centers' profit status and their sizes are listed in Figure 9, particularly in how these aspects related to specialization in the provision of child care. Centers were classified as either non-profit, for-profit or government centers. (Government centers include Tribal centers, military, Head Start, school district and community colleges.) In addition, centers with a capacity of 60 or more children were distinguished from smaller centers.

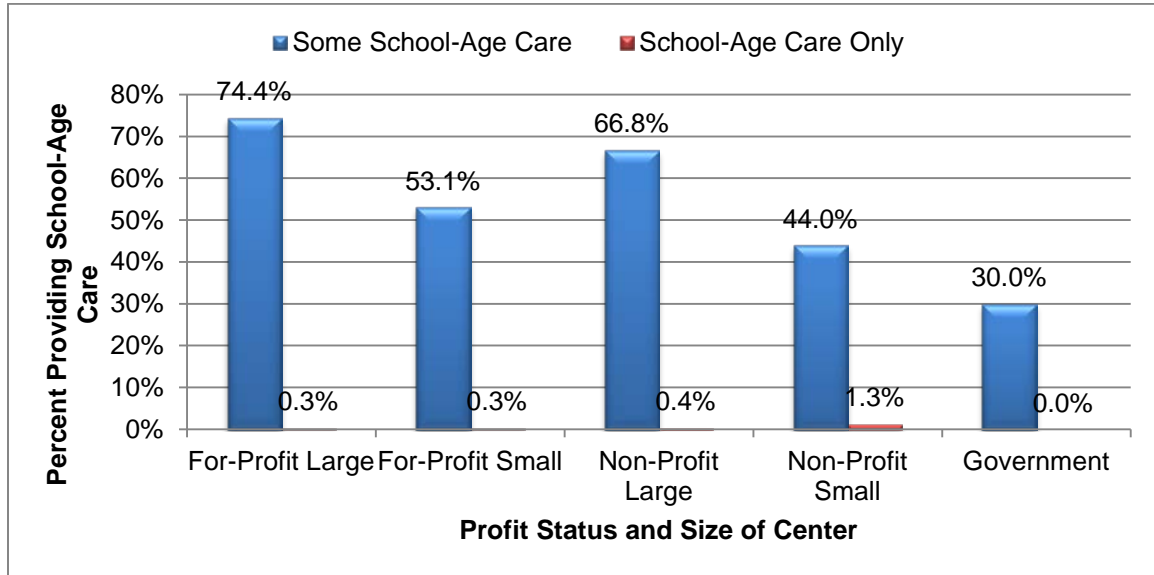
For-profit centers with a capacity of 60 or more were the type of centers most likely to provide care for infants, while government centers with a capacity of fewer than 60 were least likely to provide care for infants.

Figure 9: Child Care Centers' Profit Status and Infant Care, 2012



Large for-profit child care centers were the most likely to provide care for some school-age children; whereas Government centers were the most likely to specialize in school-age care.

Figure 10: Child Care Center's Profit Status and School-Age Care, 2012

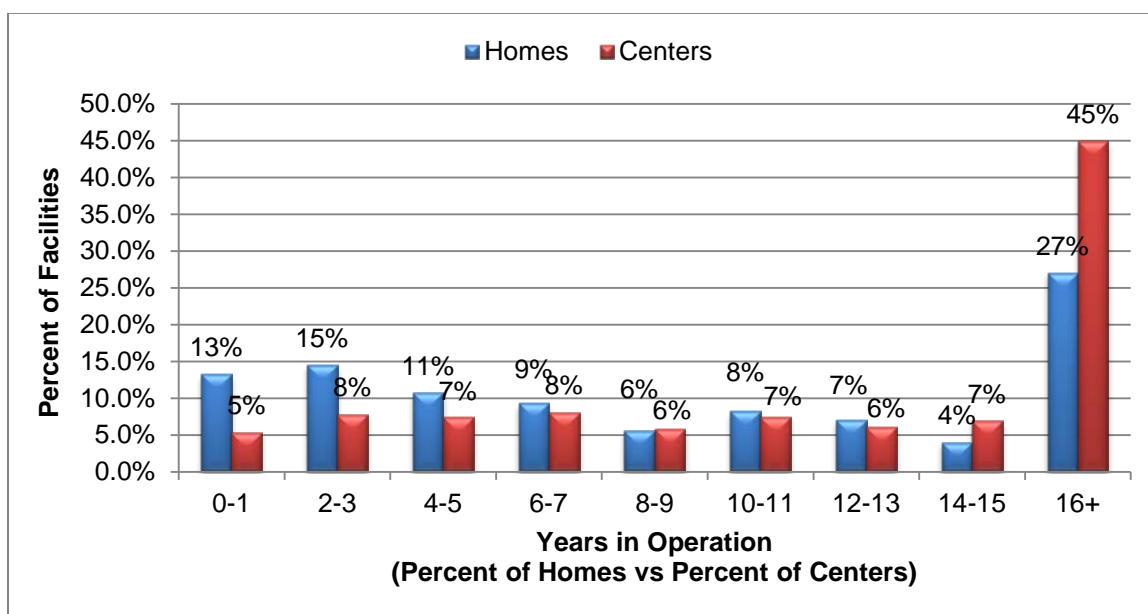


CHAPTER 6: PROVIDER BUSINESS TRAITS

Years of Operation for Child Care Centers and Family Homes

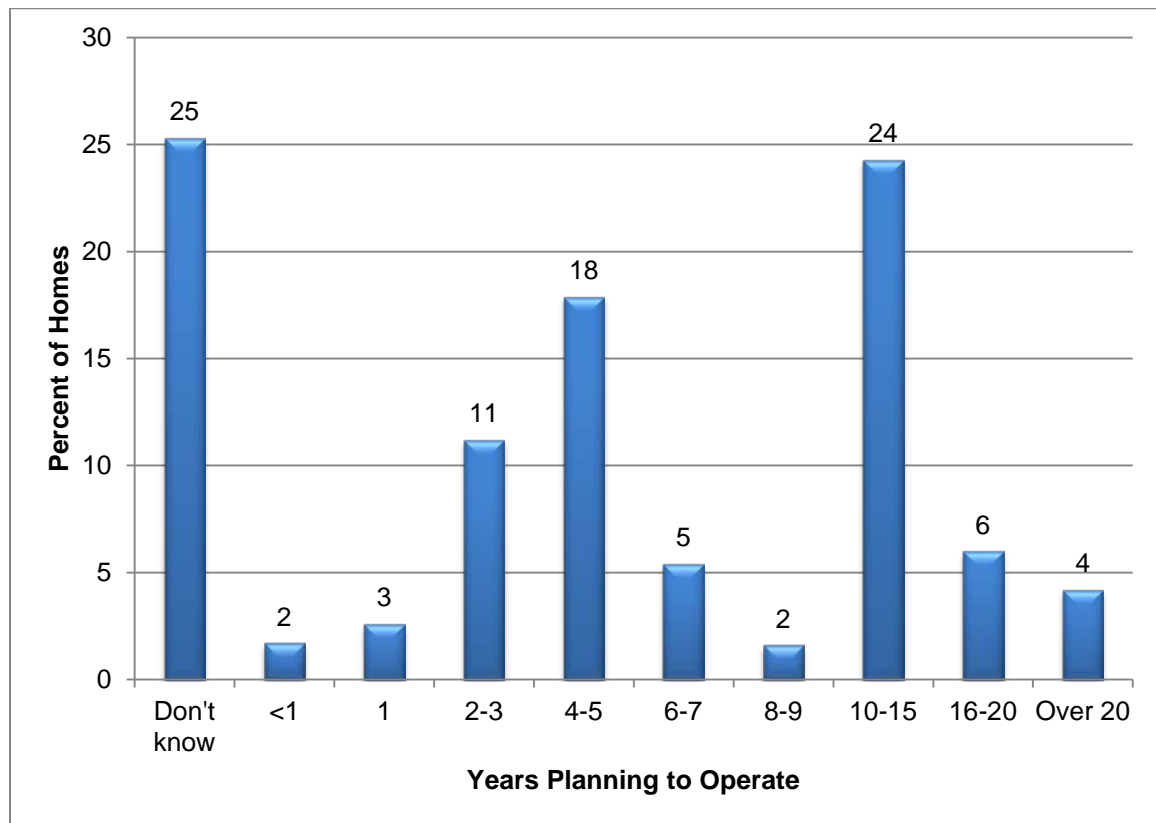
Centers generally stay in business longer than family homes. According to the 2012 surveys, centers had been in business for an average of 16 years and family homes had been in operation for an average of 11 years. Almost two-thirds, 65 percent of centers and 46 percent of family homes had been in operation for 10 years or more. A higher percentage of family homes than centers had been in business for fewer than six years (39 percent versus 20 percent).

Figure 11: Years in Business: Family Homes and Centers, 2012



Two percent of family home providers stated that their facilities would not be in business next year. This equates to 71 family homes out of business within the year. 16 percent of family home providers anticipated no longer being in the child care business within three years. Twenty-five percent of family home providers expressed that their facility will stay in business for the next four to nine years. Twenty-four percent will stay in business for the next 10-15 years; 6 percent for the next 16-20 years; and 4 percent providers will stay in business over the next 20 years. Twenty-five percent of family home owners, however, didn't know how long they would stay in business.

Figure 12: Years Plan to Operate a Child Care Home, 2012



Characteristics of Child Care Centers

Forty point five percent of all child care centers were operated by or as non-profit organizations; 50.5 percent were private for-profit businesses, 6.3 percent were government-run centers, and the remaining 2.8 percent were identified as other types of centers. Internet access was available at the majority (92.2 percent) of centers.

Table 13: Characteristics of Child Care Centers, 2012

		# in Population	Population Percent
<i>Location</i>	Church	222	15.0%
	School	144	9.6%
	Other Public Building	85	5.7%
	Employer Provided Facility	52	3.5%
	Rent or Own	883	59.1%
	Other	89	6.0%
	Respondent volunteers that it's in his or her own home	0	0.0%
<i>Type of Center</i>	Non-profit Center	589	40.5%
	For-profit Center	734	50.5%
	Government **	91	6.3%
	Other	41	2.8%
	<i>University Based Center</i>	56	3.8%
	<i>Head Start, Early Head Start, kindergarten or ECEAP program</i>	265	17.8%
	<i>Access to Internet on site</i>	1375	92.2%

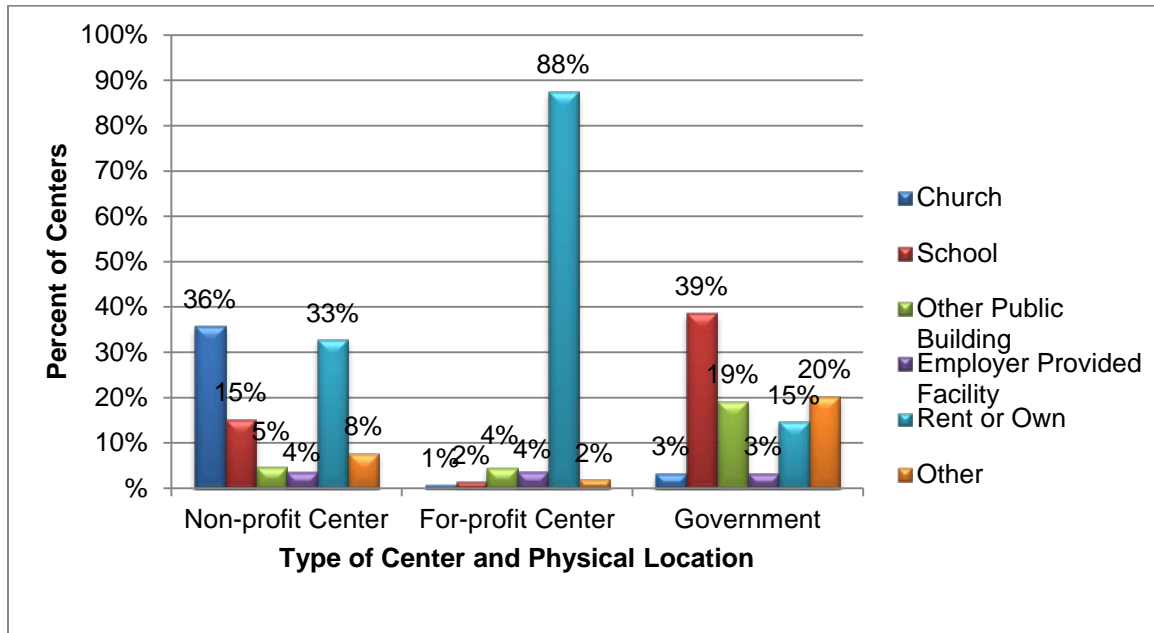
** Includes categories: Tribal, military, Head Start, school district, community college.

Centers of different types tended to be located in different types of buildings. Thirty-nine percent of government centers were located in schools and another 15 percent of government centers were located in a rented or owned building. Three percent of government centers were located in employer-provided facilities, 3 percent in churches and 20 percent in other types of buildings.

Most for-profit centers, or 88 percent, were located in private buildings that they either rented or owned; another 2 percent of for-profit centers were located in schools. The rest of the for-profit centers (11 percent) were located in employer-provided facilities, churches, privately rented or owned buildings, or other types of buildings.

Eighty-four percent of non-profit centers were located in schools, churches and rented or owned facilities. The rest of the non-profit centers were located in employer-provided facilities or other types of buildings.

Figure 13: Type of Center and Physical Location, 2012



Years of Ownership, Number of Volunteer and Paid Staff, and Years of Center Staff Experience

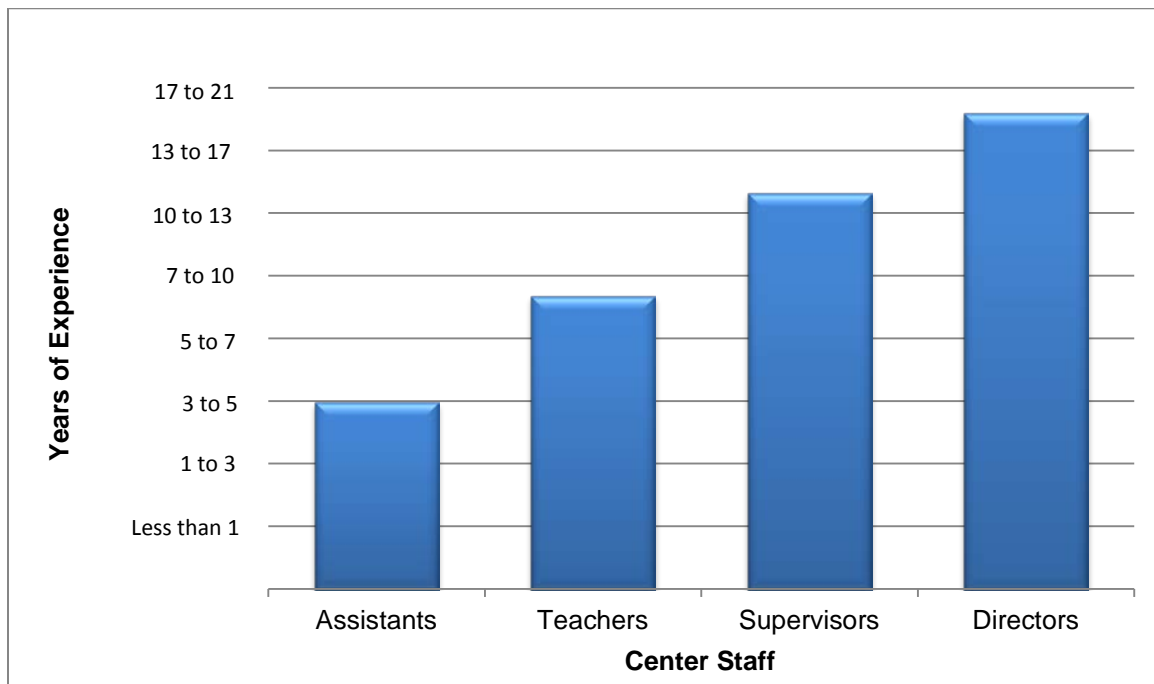
The average of years centers were under current ownership was 16.4 years. The average number of volunteers was 1.9 when considering only those centers with at least one volunteer. Sixty-six percent of centers reported having no volunteers. On average, each center had 13.1 paid staff members.

Table 14: Average Years Ownership, and Number of Volunteer and Paid Staff among Centers, 2012

	Average
Years under Current Ownership	16.4
Number of Volunteers	1.9
Number of Paid Staff Members	13.1

Respondents at centers were asked to describe the experience of their paid staff members including assistants, teachers, supervisors and directors. Staff members' experience in child care ranged from less than a year to more than thirty years. The average experience varied with the type of position. Assistants had the lowest average amount of child care experience, between 3 to 5 years, while directors averaged approximately 17 years. Teachers averaged in the lower end of the 7 to 10 year category compared to supervisors who were in the upper portion of the 10 to 13 years of experience category.

Figure 14: Average Number of Years of Paid Child Care Experience for Center Staff, 2012



Paid and Non-Paid Staff at Centers

All centers employed paid staff members in 2012. Fifty-one percent, were teachers, and 35 percent, were assistants. Supervisors accounted for 6 percent of staff compared to 8 percent directors. Close to 34 percent of centers received additional help from volunteers. The proportion of staff in the roles of supervisor and director were quite similar among for-profit, non-profit and government centers, ranging from 4.9 percent to 8.1 percent.

Government-affiliated centers were more dependent on assistants, at 44.8 percent, than for-profit and non-profit centers. Over half, or 57.8 percent of government centers reported using volunteers to assist in the care of children. For-profit centers were the least likely, at 20.8 percent, to have volunteers compared to 48.2 percent of nonprofit centers and 57.8 percent of government-run centers. Among centers with at least one volunteer, for-profit centers averaged 0.6 volunteers, non-profits 2.4, and government-operated centers averaged 5.3 volunteers.

Table 15: Staff Composition by Type of Center, 2012

	Assistants	Teachers	Supervisors	Directors	% of Centers using Volunteers	Avg # of Volunteers
Non-profit Center	36.5%	49.5%	5.9%	8.1%	48.2%	2.4
For-profit Center	30.9%	55.1%	6.3%	7.8%	20.8%	0.6
Government	44.8%	42.3%	7.4%	5.5%	57.8%	5.3
Other	50.9%	39.3%	4.9%	4.9%	39.0%	12.9
All Centers	34.8%	51.4%	6.2%	7.7%	34.4%	2.0

Wages, Children per Staff, and Type of Staff at Centers

Average hourly wages for center staff were \$9.94 for assistants, \$12.52 for teachers, \$14.65 for supervisors, and \$15.31 for directors. Compared to the 2010 survey results, average wages increased 2.9 percent for assistants and 4.2 percent for teachers and 4.6 percent for supervisors. However, average wages decreased 6 percent for directors. The average monthly salary for directors in 2012, which was \$2,653, was lower than the average salary in 2010, which was \$2,822. Whether the decrease was caused by the economy or calculation problems needs to be further examined.

Table 16: Median and Average Income, Children per Staff, and Turnover by Type of Staff among Child Care Centers, 2012

	Income*				Hired After Sept 1, 2011
	Median Monthly	Average Monthly	Median Annual	Average Annual	
Assistants	\$1,647	\$1,723	\$19,760	\$20,682	40.0%
Teachers	\$1,907	\$2,170	\$22,880	\$26,041	19.6%
Supervisors	\$2,427	\$2,539	\$29,120	\$30,469	12.7%
Directors	\$2,600	\$2,653	\$31,200	\$31,836	9.4%

Staff turnover rates varied among different staff positions. The proportion of assistants newly hired was more than twice the proportion for teachers, which was 19.6 percent. Thirteen percent of supervisors were newly hired compared to 9.4 percent of directors newly hired after September 1, 2011.

Overall, the staff turnover rates of assistants, teachers and supervisors were lower than those of 2010. Almost half of assistants in Region 1 were newly hired compared to 0.0 percent newly hired supervisors in Region 2. The turnover rate of directors varied significantly across the regions. Region 1 had no newly hired directors while one-fifth of the directors were newly hired in Region2 since September 1, 2011.

Table 17: Percent of Staff Newly Hired by Region, 2012

Region	Assistants	Teachers	Supervisors	Directors
1	47.9%	22.6%	14.1%	0.0%
2	42.2%	18.5%	0.0%	20.0%
3	42.3%	23.1%	3.8%	8.8%
4	37.7%	17.7%	12.5%	9.1%
5	38.1%	17.1%	46.7%	12.5%
6	37.5%	20.9%	13.3%	7.1%
All*	40.0%	19.6%	12.7%	9.4%

* Since the populations of each region are not equal, the averages for the ALL row are weighted averages.

For all positions of employees, the wages paid in Region 4 were higher than those paid in other regions. The average monthly income for assistants, teachers, supervisors and directors in Region 4 was \$1,902, \$2,466, \$3,016 and \$3,077 respectively.

When comparing positions across the regions, assistants and teachers in Regions 1 had the lowest average monthly income at \$1,529 and \$1,940. For supervisors, Region 6 had the lowest average monthly income at \$2,187. For directors, Region 6 had the lowest average monthly income at \$2,274.

Table 18: Median and Average Monthly Income of Child Care Center Staff by Region, 2012

Region	Monthly Income							
	Assistants		Teachers		Supervisors		Directors	
	Median	Average	Median	Average	Median	Average	Median	Average
1	\$1,567	\$1,529	\$1,733	\$1,940	\$2,080	\$2,205	\$2,429	\$2,499
2	\$1,572	\$1,616	\$1,733	\$2,168	\$2,125	\$2,327	\$2,250	\$2,276
3	\$1,733	\$1,713	\$2,023	\$2,152	\$2,583	\$2,442	\$2,700	\$2,830
4	\$1,907	\$1,902	\$2,340	\$2,466	\$2,947	\$3,016	\$3,333	\$3,077
5	\$1,634	\$1,699	\$1,820	\$1,996	\$2,253	\$2,360	\$2,440	\$2,324
6	\$1,577	\$1,607	\$1,790	\$1,965	\$2,172	\$2,187	\$2,300	\$2,274
All*	\$1,647	\$1,723	\$1,907	\$2,170	\$2,427	\$2,539	\$2,600	\$2,653

* Since the populations of each region are not equal, the averages for the ALL row are weighted averages.

Salaries paid to assistants, teachers, supervisors and directors are further broken down by center types in Table 19. Regardless of positions, staff members employed through government centers had the highest levels of income whereas staff members employed through for-profit centers had the lowest levels of income. The higher the position, the larger the gap was between the highest and lowest income.

The gap between the highest median monthly amount paid to assistants and the lowest was \$191. The gap between the highest median monthly amount paid to teachers and lowest was \$875. The gap between the highest median monthly amount paid to supervisors and lowest was \$650. The gap between the highest median monthly amount paid to directors and lowest was \$1,500.

Table 19: Median Monthly, Average Monthly and Annual Income in Child Care Centers by Center Type, 2012

Center Type	Income			
	Median Monthly	Average Monthly	Median Annual	Average Annual
Government				
Assistants	\$1,820	\$1,923	\$21,840	\$23,082
Teachers	\$2,695	\$2,746	\$32,344	\$32,957
Supervisors	\$2,947	\$3,085	\$35,360	\$37,026
Directors	\$4,000	\$3,861	\$48,000	\$46,330
Non-Profit				
Assistants	\$1,733	\$1,746	\$20,800	\$20,949
Teachers	\$2,076	\$2,238	\$24,908	\$26,856
Supervisors	\$2,557	\$2,646	\$30,680	\$31,755
Directors	\$2,685	\$2,727	\$32,220	\$32,719
For-Profit				
Assistants	\$1,629	\$1,688	\$19,552	\$20,255
Teachers	\$1,820	\$2,045	\$21,840	\$24,538
Supervisors	\$2,297	\$2,387	\$27,560	\$28,643
Directors	\$2,500	\$2,464	\$30,000	\$29,571

Employee Benefits for Directors in Centers

Questions related to benefits were restricted to the directors. Seventy percent of centers offered paid vacation and 58.2 percent offered paid sick leave. Fifty percent of the centers offered health insurance and 40.7 percent offered dental insurance. Twenty-four percent offered free child care and 43.6 percent offered child care at a reduced rate. Of the listed benefits, 2.2 percent of the centers did not offer any of them.

Table 20: Directors Benefits in Child Care Centers, 2012

	Percent of Centers
Paid sick leave	58.2%
Paid vacation	69.6%
Paid personal days	45.6%
Paid holidays	68.0%
Health insurance	49.8%
Dental insurance	40.7%
Disability insurance	26.4%
Vision insurance	33.4%
Retirement plan	36.8%
Free child care	23.7%
Reduced child care	43.6%
Meals	35.6%
Paid college tuition	23.3%
Paid conference or training registration fees	59.5%
Paid release time for training or school	39.3%
Periodic cash bonuses	31.0%
Do not offer these benefits	2.2%
Other benefits	6.3%

Table 21 further breaks down benefits by regions. Centers in Region 4 were most likely to offer benefits to teachers whereas centers in Region 2 were the least likely to offer benefits. In Region 4, 70.6 percent of centers offered paid sick leave, 79 percent offered paid vacation and 70.3 percent offered health insurance. In Region 2, 47.5 percent of centers offered paid sick leave, 53.4 percent offered paid vacation and 34.4 percent offered health insurance.

Table 21: Centers providing Benefits to Directors by Benefit Type and Region, 2012

Benefits	Region					
	1	2	3	4	5	6
Paid sick leave	50.6%	47.5%	61.7%	70.6%	49.0%	50.5%
Paid vacation	68.5%	53.4%	70.9%	79.0%	68.0%	60.1%
Paid personal days	41.4%	39.2%	45.1%	57.8%	37.9%	35.4%
Paid holidays	59.2%	54.6%	68.3%	81.9%	64.7%	56.9%
Health insurance	38.5%	34.4%	46.4%	70.3%	36.6%	40.8%
Dental insurance	26.4%	22.5%	36.5%	62.5%	28.8%	32.8%
Disability insurance	17.8%	15.4%	27.2%	36.6%	26.1%	18.3%
Vision insurance	22.1%	19.0%	31.2%	51.1%	25.5%	23.6%
Retirement plan	27.8%	28.5%	34.5%	52.3%	26.8%	28.5%
Free child care	22.1%	26.1%	29.8%	20.9%	22.9%	24.7%
Reduced child care	36.4%	33.2%	49.1%	48.8%	43.1%	39.7%
Meals	38.5%	30.9%	42.4%	36.0%	38.6%	26.8%
Paid college tuition	7.8%	11.9%	24.5%	33.7%	27.5%	16.1%
Paid conference or training registration fees	46.4%	55.8%	65.6%	70.3%	54.3%	49.9%
Paid release time for training or school	32.8%	34.4%	37.8%	49.4%	34.6%	32.8%
Periodic cash bonuses	26.4%	22.5%	38.5%	38.1%	24.2%	24.7%
Do not offer these benefits	2.9%	4.7%	1.3%	1.5%	1.3%	3.2%
Other benefits	8.6%	2.4%	8.6%	8.7%	3.9%	2.1%

Characteristics of Family Child Care Homes

In 2012, 60.7 percent of family homes received assistance from the U.S. Department of Agriculture (USDA) Child and Adult Care Food Program. 49 percent of family homes reported having liability insurance, and 52.6 percent claimed their child care earnings were the main source of income for their households.

Compared with 2010, fewer family home providers were covered by liability insurance, and fewer family homes providers regarded the child care earnings as their main source of income. On-site Internet access rate at family homes increased 3% percent since 2010 and was at a rate slightly below that found for centers (87.5 percent versus 92.2 percent; Table 13).

Table 22: Characteristics of Family Home Providers, 2012

	Percent of Family Homes
Receive Assistance from the USDA Food Program	60.7%
Covered by Liability Insurance	49.0%
Child Care Earnings Main Source of Income	52.6%
Access to Internet On-site	87.5%

Seventy-one percent, of family home providers indicated they had medical insurance. When asked about levels of education, 8.2 percent reported having an associate degree in child development or a Child Development Associate (CDA); only 2.6 percent had a bachelor's or graduate degree in early childhood development. Fewer owners of family homes had an associate degree, a CDA or a bachelor's or graduate degree in early childhood development compared to 2010 survey. A little more than a quarter, or 26.6 percent, of family homes providers were Latino or Hispanic. Table 23 also displays the racial breakdown of the owners of family homes.

Table 23: Characteristics of Owners of Family Homes, 2012

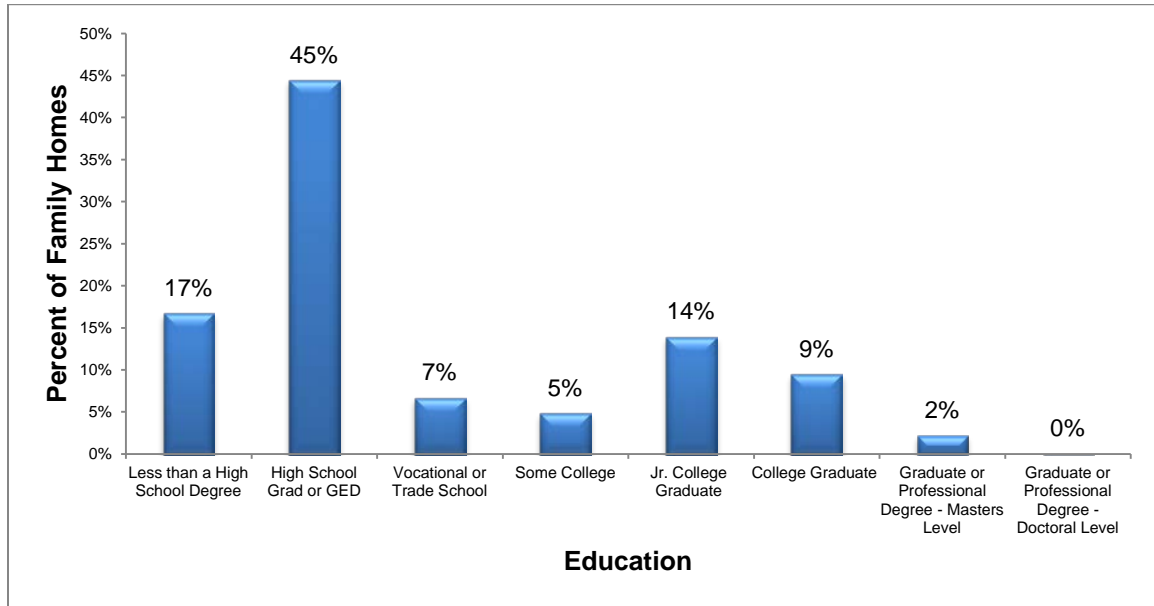
	Number of Family Homes	Percent of Family Homes*
Have Medical Insurance	2959	71.1%
Have Associate Degree in Child Development or a CDA	339	8.2%
Have Bachelor's or Graduate Degree in Early Childhood Development	109	2.6%
Latino or Hispanic	1109	26.6%
Racial Group		
White	2531	60.8%
African American/Black	360	8.6%
Asian	233	5.6%
American Indian or Alaskan Native	94	2.3%
Hawaiian or Pacific Islander	32	0.8%
Other	855	20.6%
Refused to Answer	57	1.4%

*Note that percentages do not add up to 100% due to non-response.

Education of Family Home Providers

Eleven percent of family home providers had a bachelor's or master's degree and among them, almost 3 percent had a bachelor's or graduate degree in early childhood education. Nineteen percent, of family home providers either had some college experience or an associate's degree. Seven percent had a vocational or trade school degree and 45 percent had Graduate Equivalency Degree (GED) or high school degrees. Only, 17 percent of providers reported having less than a high school degree.

Figure 15: Family Home Providers' Highest Level of Education, 2012



Income of Family Home Providers

The average gross income for family home providers in Region 4 was \$39,707, higher than those in all other regions. Family home providers in Region 2 earned the least with an average gross income of \$25,674. Compared with income reported in 2010, family home providers in Region 3 saw an increase in the average annual earnings whereas the remaining regions experienced a decrease.

Table 24: Median and Average Gross Annual Earnings of Family Home Providers by Region, 2012

Region	Family Home Annual Earnings	
	Median	Average
1	\$24,000	\$26,732
2	\$21,500	\$25,674
3	\$32,000	\$37,107
4	\$34,000	\$39,707
5	\$30,000	\$32,866
6	\$26,850	\$32,951
All	\$28,818	\$32,908

* Since the populations of each region are not equal, averages for the ALL row are weighted averages.

The earnings of family home providers were related to other factors besides geography. For 52.6 percent family home providers, child care earnings were their households' primary source of income. The average income, \$39,386, was considerably higher than family home providers with other income sources. A positive relationship was found between the length of time family homes had been in business and their incomes. The longer a family home provider was in business, the higher income he or she tended to make.

Table 25: Median and Average Earnings of Family Home Providers Overall and by Years in Business and Child Care as Main Source of Income, 2012

	Family Home Annual Earnings	
	Median	Average
Overall	\$28,818	\$32,908
<i>Years in Business</i>		
0 through 3 years	\$15,000	\$20,778
4 through 6 years	\$29,000	\$35,844
7 or more years	\$34,000	\$38,626
<i>Child Care Main Source of Income</i>		
Yes	\$35,000	\$39,386
No	\$22,000	\$25,173

Hours of Operation

Sixty-two percent of centers and 56 percent of family homes open before 7 a.m. Centers were more likely than family homes to stay open past 6 p.m. In 2012, 78.3 percent of centers were open later in the evening, after 6 p.m., compared to 40.7 percent of family homes.

Parents had a better chance finding 24-hour care and weekend care in family homes in 2012. While only 0.4 percent of centers were open 24 hours, 16.4 percent, of family homes were open 24 hours. Similarly, 51.5 percent of family homes provided weekend service compared to only 5.6 percent of centers.

Table 26: Child Care Availability by Type of Facilities, 2012

	Centers	Family Homes
<i>Mornings</i>		
Before 6 a.m.	16.1%	22.8%
6 to 7 a.m.	46.1%	33.2%
<i>Evenings</i>		
6 to 7 p.m. *	72.0%	28.5%
7 to 8 p.m. **	3.0%	3.9%
Later than 8 p.m. ***	3.3%	8.3%
Open 24 Hours	0.4%	16.4%
<i>Weekends</i>		
Saturday	4.3%	30.7%
Sunday	1.3%	20.8%

* Reported closing times from 6 p.m. to 6:59 p.m.

** Reported closing times from 7 p.m. to 7:59 p.m.

*** Reported closing times of 8 p.m. and later

Special Needs Care at Centers and Family Homes

Fifty-six percent of centers were providing care for children with special needs and 17.6 percent of family homes either were providing or had provided care for children with special needs at the time of the survey. Twenty-four percent of centers that weren't providing special needs care had provided care for children with needs previously. The main reason family homes did not currently provide care for children with special needs was because no parents had sought that service.

Eight percent of centers and 2.5 percent of family homes received the special needs rate (level 1) and/or applied for and received a rate above the special needs rate (level 2) since July 1, 2011. The majority of centers, 53.1 percent, and 44 percent of family homes received the special needs rate after they applied for it after July 1, 2011. The proportions of centers and family homes received a rate above level 2 special needs rate were mixed since they applied for it after July 1, 2012 (Center: 23.6 percent & Family Homes: 47.1 percent).

When parents sought special needs care for their children, they were more likely to seek care from centers (74.2 percent) compared to family homes (40.3 percent). The majority of centers (73.2 percent) and family homes (64.9 percent) had the ability to provide special needs care. However, more centers (47 percent) stated they had special training or skills to care for children with special needs compared to family homes (26.9 percent). Fewer centers than family homes charged an extra rate for the care of a child with special needs.

Table 27: Comparison of Care to Children at Centers and Family Homes

	Percent of	
	Centers	Family Homes
Applied for the special needs rate since July 1, 2011?	8.1%	4.1%
Received special needs rate	4.3%	1.8%
Requested a rate above the special needs rate since July 1, 2011?	3.8%	1.7%
Received a rate above the special needs rate	0.9%	0.8%
Currently or have provided care for children with special needs	--	17.6%
Currently provide care for children with special needs	56.3%	--
Previously provided care for children with special needs (No Care Currently)	24.4%	--
Charge an extra rate for children with special needs	5.1%	3.7%
Have special training or skills to care for children with special needs	50.9%	11.7%
A parent with a child with special needs had sought the child care services	71.3%	32.2%
Have the ability to provide care for a child with special needs	N/A	N/A
Primary reason special needs care not provided:		
Lack of training	4.3%	6.4%
Lack of staff	3.7%	2.3%
None have sought service	--	66.1%
Something else	3.5%	8.5%

CHAPTER 7: CHILD CARE PRICES

In general, centers charged more per child than family homes regardless of the child's age. Infant care was the most expensive, with rates decreasing as children's age increased for both centers and family homes.

Table 28: Average Rate per Month and Annual Cost for Full-Time Child Care by Type of Facility and Age Group

	Average Rate per Month	Annual Cost of Child Care
<i>Centers *</i>		
Infant	\$1,029	\$12,343
Toddler	\$866	\$10,392
Preschooler	\$766	\$9,187
Kindergartener	\$641	\$7,696
School-Age	\$546	\$6,557
<i>Family Homes * ^</i>		
Infant	\$693	\$8,313
Toddler	\$665	\$7,984
Preschooler	\$609	\$7,304
Kindergartener	\$535	\$6,422
School-Age	\$493	\$5,920

* Rates are all standard, full-time, non-subsidized

^ Rates for Family Homes calculated: [Annual=Weekly Rate X 52] and [Monthly Rate=Annual/12]

CHAPTER 8: CHILDREN WHO RECEIVED CARE SUBSIDIZED BY THE STATE

Facilities That Accepted Child Care Subsidies

In 2012, an estimate of 31,233 children received subsidized child care in Washington. Among them 10,557 children were cared for in licensed family homes, representing 41.7 percent of all children in family homes, and 20,676 children were cared for in child care centers, representing 20 percent of all children in centers. Centers cared for children with subsidies at a higher rate than family homes, 79 percent versus 63.4 percent. Centers with no limits on the number of children with subsidies they accepted cared for 18,743 children with subsidies, which was more than nine times the number of children in the care of centers with limits. Of the centers that cared for children with subsidies, 989 centers (83.7 percent) didn't set limits on how many children with subsidized child care they accepted.

More than 41 percent of children in family homes received subsidized care and only 20 percent of children in centers received subsidized care. On average, a family home cared for 2.6 children with subsidies and centers cared for 19.8 children with subsidies over the last typical week of operation.

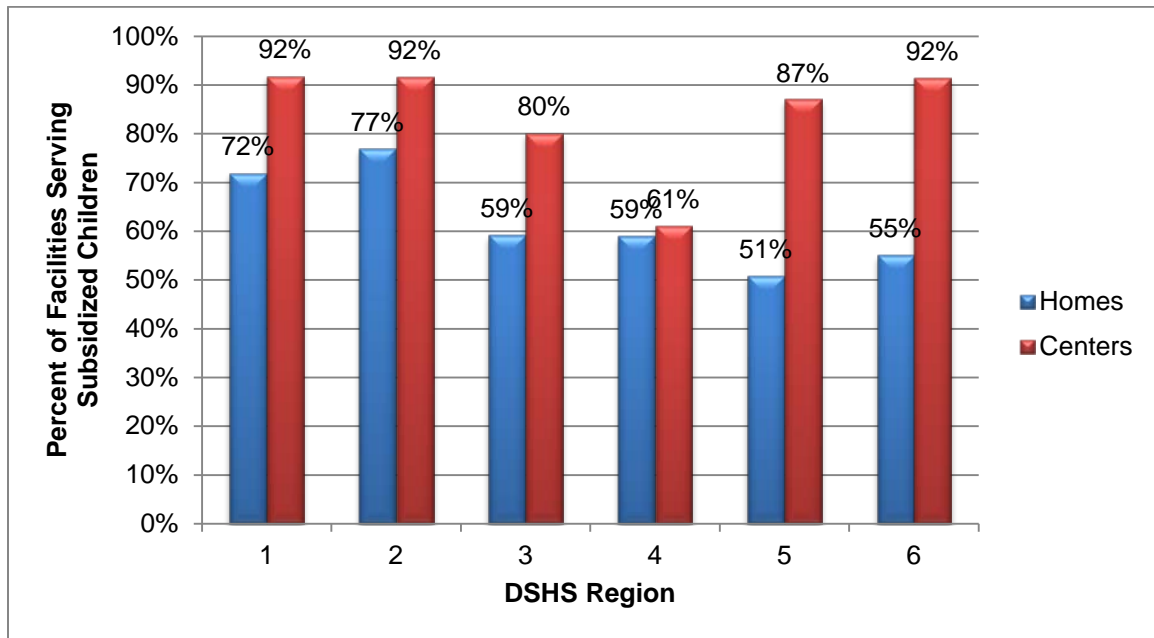
Table 29: Subsidies Accepted by Type of Facility, 2012

	Family Homes	Centers		
		Overall	Sets Limits	No Limits
Number of Facilities with Subsidized Children	2,614	1,181	192	989
As Percent of All Licensed Facilities	63.4%	79.0%	12.9%	66.2%
Total Number of Children Receiving Subsidies	10,557	20,676	1,933	18,743
As Percent of All Children in Licensed Care	41.7%	20.0%	1.9%	18.2%
Average # of Children Receiving Subsidies	2.6	19.8	10.6	21.9

Regional Variation

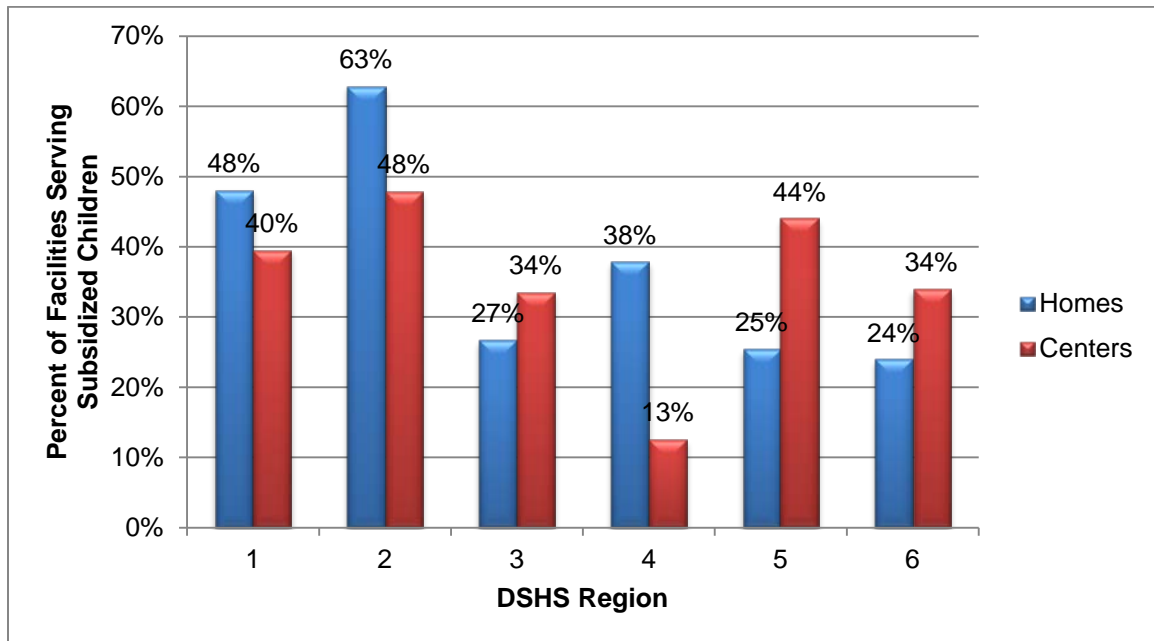
Centers in all regions had a higher rate of caring for children with subsidies than family homes. Region 6 had the largest disparity between homes and centers providing subsidized care. The highest rate of family homes serving children with subsidies appeared in Region 2 compared to the lowest rate (51 percent) in Region 5.

Figure 16: Facilities Serving Subsidized Children by Region, 2012



In Regions 1 and 2, children who received subsidized child care represented at least 45 percent of all children in licensed family homes. Region 2 had the highest proportion of children receiving subsidized child care in family homes at 63 percent, and Region 2 had the highest proportion in centers at 48 percent. The proportions of children receiving subsidized child care were mixed with Regions 1, 2 and 4 having a higher percentage in family homes and Regions 3, 5 and 6 having higher percentages in centers. Although family homes cared for fewer numbers of children with subsidies than centers overall, the difference was attributable to the smaller size of family homes.

Figure 17: Children Who Received Subsidies as Percent of All Children in Licensed Facilities by Region, 2012



In 2012, on average 79.4 percent of centers provided care for at least one child with subsidies. Region 4 had the lowest rate of serving children with subsidies, which was 61.1 percent. Of centers that provided care for children with subsidies, only 16.4 percent of centers limited the number of children with subsidies that they enrolled. Region 4 was the most likely to set limits and Region 2 the least likely to set limits. For the centers not currently serving children with subsidies, the majority (57.1 percent) of centers were willing to serve them except for Region 2. Only 30 percent of centers in Region 2 were willing to accept children with subsidies in the future.

Compared to the 2010 survey results, all regions on average were more willing to serving children with subsidies in 2012, an increase from 51.9 percent to 57.1 percent. For centers with limits, the average limit was 13 children with subsidies.

Table 30: Centers Limiting Enrollment of Children Who Received Subsidies by Region, 2012

Region	Number of Centers	% Serving Subsidized Children	% Willing to Serve Subsidized Children *	% Limiting Subsidized Children	Average Limit on Subsidized Children
1	198	91.9%	81.3%	13.4%	20
2	119	91.6%	30.0%	5.5%	31
3	213	80.1%	51.4%	18.1%	14
4	486	61.1%	55.8%	24.0%	10
5	216	87.0%	61.9%	22.0%	12
6	263	91.5%	66.7%	8.4%	9
All Centers	1494	79.4%	57.1%	16.4%	13

* Of those centers not providing subsidized care (during their last typical week).

Effects of Subsidy Rates for Preschool Children in Centers

Among centers that cared for full-time preschool children, the average nonsubsidized monthly rate for such care was lower in centers that served children who received subsidies (\$710) than in those centers that did not (\$1,008). Region 4 had the largest differences at 28 percent, where 38.9 percent of centers not serving children with subsidies were located. In contrast, Region 1 had the smallest impact on statewide differences at 0 percent, where 8.1 percent of centers not serving children with subsidies were located.

Table 31: Full-Time Rates for Preschool Children, Differences between Centers Serving and Not Serving Children with Subsidies by Region, 2012

Region	Average Monthly Rates for Preschool Children		
	Serving Children Who Received Subsidies	Not Serving Children Who Received Subsidies	Percent Difference *
1	\$624	\$623	0%
2	\$562	\$646	15%
3	\$727	\$749	3%
4	\$913	\$1,172	28%
5	\$673	\$709	5%
6	\$621	\$661	6%
All Centers	\$710	\$1,008	42%

* $[(\text{Not Subsidized Rate}) - (\text{Subsidized Rate})] / (\text{Subsidized Rate})$

DSHS Rates and 75th Percentile Rate for All Age Groups

Center non-subsidized monthly and weekly rates were converted to daily rates for comparison purposes in Table 32 and 33. The state subsidy rates were below the 75th percentile of the center private paid child care rate charged regardless of a children's age across the regions.

The data was also used to estimate the proportion of private paying children who received care that cost the same or less than the state subsidy rate. The daily subsidy rate for infant care in Region 4 was \$44.38. Only 7 percent of the centers' in region 4 reported charging the subsidy rate or less. The biggest gap between the subsidy rate and the 75th percentile rate of all age groups appeared in infant care in Region 4, which was \$30.03. The subsidy rate, however, was a much closer to the 75th percentile of rates centers charged a day for school-age children in all regions, with the biggest difference being \$8.93.

Table 32: Center DSHS Rates versus 75th Percentile Rate per Day¹ and Percent of Facilities At or Below DSHS Rate for Full-Time Children by Age Group and Region, 2012

Region	Infant			Toddler			Preschool			School-Age		
	Subsidy Rate*	75th Per-centile ²	% At/Below Subsidy Rate ³	Subsidy Rate	75th Per-centile ²	% At/Below Subsidy Rate ³	Subsidy Rate	75th Per-centile ²	% At/Below Subsidy Rate ³	Subsidy Rate	75th Per-centile ²	% At/Below Subsidy Rate ³
1	\$28.53	\$40.45	12%	\$23.99	\$33.18	12%	\$22.67	\$30.45	17%	\$21.34	\$26.14	35%
2	\$28.81	\$35.61	25%	\$24.06	\$31.14	13%	\$22.30	\$27.36	18%	\$19.73	\$25.00	26%
3	\$38.13	\$54.16	13%	\$31.79	\$44.77	19%	\$27.46	\$38.68	17%	\$26.67	\$28.82	62%
4	\$44.38	\$74.41	7%	\$37.06	\$62.73	9%	\$31.09	\$51.59	6%	\$28.00	\$36.93	54%
5	\$32.54	\$43.18	9%	\$28.00	\$38.18	11%	\$24.65	\$34.55	10%	\$21.88	\$26.49	49%
6	\$31.99	\$43.64	19%	\$27.46	\$37.73	21%	\$23.99	\$31.59	20%	\$23.46	\$25.00	47%

*All Rates are from the DEL website and are dated July 1, 2009 (and are the same as the 2010 report)

1 Daily Rate=Monthly/22.

2 Seventy-five percent of providers charge this rate or less.

3 Percent of providers charging at or below current subsidy rate.

The gap between the subsidy rate and the 75th percentile of the private paying rate family homes charged was smaller than that of centers.

The daily subsidy rate for infant care in Region was \$40.04. Fifty-two percent of family homes in Region 4 reported charging the subsidy rate or less. The biggest gap between the subsidy rate and the 75th percentile rate for all age groups appeared in preschool care in Region 4, which was \$10.67.

Table 33: Family Home Subsidy Rates versus 75th Percentile Rate per Day¹ and Percent of Facilities At or Below the Subsidy Rate for Full-Time Children by Age Group and Region, 2012

Region	Infant			Toddler			Preschool			School-Age		
	Subsidy Rate*	75th Per-centile ²	% At/Below Subsidy Rate ³	Subsidy Rate	75th Per-centile ²	% At/Below Subsidy Rate ³	Subsidy Rate	75th Per-centile ²	% At/Below Subsidy Rate ³	Subsidy Rate	75th Per-centile ²	% At/Below Subsidy Rate ³
1	\$24.29	\$29.15	32%	\$21.12	\$26.80	24%	\$21.12	\$25.09	35%	\$18.78	\$23.05	31%
2	\$25.65	\$30.00	51%	\$22.30	\$29.00	31%	\$19.95	\$26.00	27%	\$19.95	\$25.00	43%
3	\$34.03	\$40.00	42%	\$29.33	\$36.00	36%	\$25.81	\$32.50	35%	\$23.46	\$28.00	21%
4	\$40.04	\$47.50	52%	\$34.81	\$45.00	28%	\$29.33	\$40.00	30%	\$28.16	\$32.13	63%
5	\$26.99	\$34.60	41%	\$23.46	\$32.00	21%	\$22.30	\$29.13	27%	\$19.95	\$25.00	23%
6	\$26.99	\$31.20	32%	\$23.46	\$30.00	24%	\$23.46	\$28.13	41%	\$22.30	\$27.00	52%

*All rates are from the DEL website and are dated July 1, 2009 (and are the same as the 2010 report)

1 Daily Rate=Monthly/22.

2 Seventy-five percent of providers charge this rate or less.

3 Percent of providers charging at or below current subsidy rate.

Survey participants from centers not currently caring for children with subsidies were presented with the four statements listed in Table 34. They were asked to indicate whether they agreed or disagreed with each statement. About one-in-five or 18.3 percent of participants believed caring for children receiving subsidies required extra work. The majority (85.9 percent) agreed that the state did not pay their full rates; 6.6 percent stated that they didn't understand subsidy billing rules, and 20.8 percent just didn't like to deal with the state.

Table 34: Beliefs and Attitudes about Subsidized Child Care among Child Care Centers Not Currently Providing Subsidized Care, 2012

	Reasons for NOT Providing or Limiting Subsidized Care		
	Yes	No	DK/Refuse
The state does not pay my full rate	85.9%	8.6%	5.5%
Children with subsidies require extra work	18.3%	77.2%	4.5%
I don't understand subsidy billing rules	6.6%	89.3%	4.1%
I don't like to deal with the state	20.8%	74.8%	4.5%

Characteristics and Willingness of Family Home Providers Serving Children with Subsidized Child Care

In Washington, 62.8 percent of all family homes accepted children receiving child care subsidies. Sixty-one percent of family home providers were white and more than half (54.7 percent) of those family homes served children with subsidies. A total of 4,489 children with subsidies were served in Hispanic family home child cares. Seventy-nine percent of all children in Hispanic family homes receive subsidies. Almost 50 percent of Asian 70 percent of Native American family homes served children with subsidies compared to 85.3 percent in black family homes.

While children with subsidies accounted for 41.7 percent of children in licensed care in 2012, 79.3 percent of the children cared for in Hispanic family homes were children with subsidies, 84.1 percent in black family home child cares, 37.1 percent in Asian family homes, 31.4 percent in Native-American family homes, and 29 percent of the children cared in white family home child cares were children with subsidies. Also, children with subsidies accounted for 71.2 percent of all children cared for in family homes whose providers' ethnicities were unknown.

Table 35: Family Home Providers Serving Children with Child Care Subsidies by Ethnicity of Provider, 2012

	A	B	C	D	E	F
Ethnicity of Provider	# of Providers	Percent of Providers	Percent Serving Subsidized Children	# of Subsidized Children Served	Total # of Children Served	% of All Children (D as % of E)
White	2531	60.8%	54.7%	4970	17158	29.0%
Hispanic	1109	26.6%	81.4%	4489	5660	79.3%
Asian	233	5.6%	49.4%	466	1257	37.1%
Black	360	8.6%	85.3%	1339	1593	84.1%
Native American	94	2.3%	69.1%	171	545	31.4%
Other or Unknown	887	21.4%	80.4%	3342	4693	71.2%
State Total	4162	100.0%	62.8%	10557	25329	41.7%

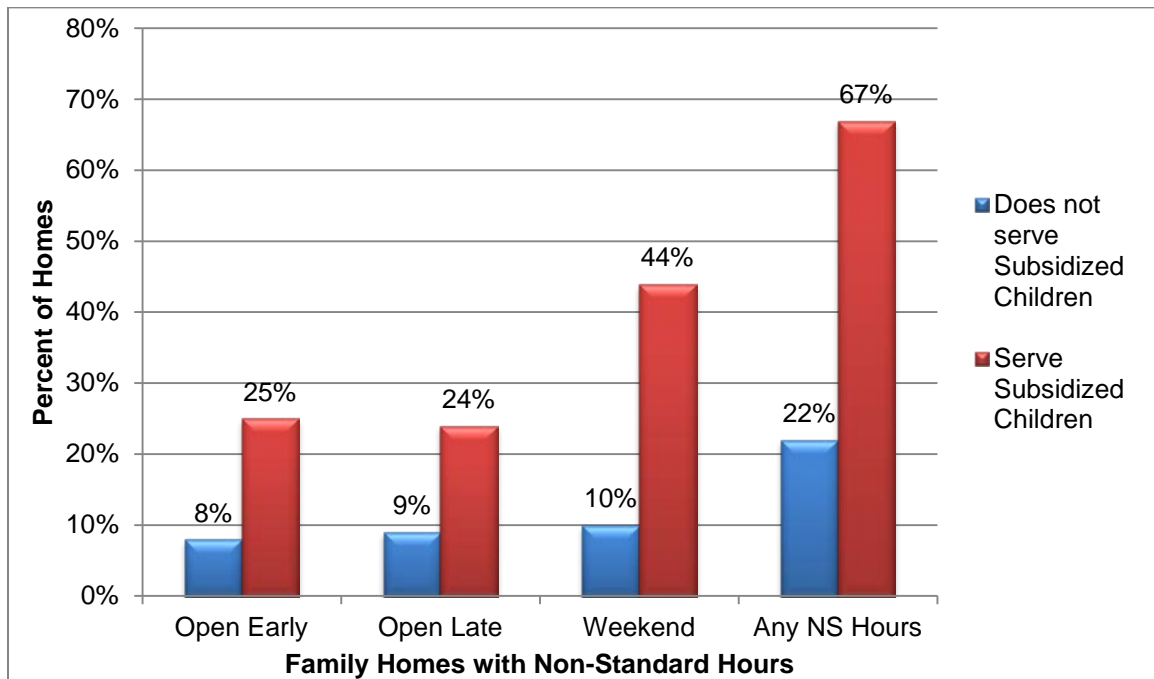
A total of 62.8 percent of family homes provided care for children with subsidies. Region 2 had the highest percentage of serving children with subsidies, which was 77 percent, compared to the lowest percentage in Region 5, which was 50.9 percent. Family homes in Region 4 not currently providing care to children with subsidies were the least willing to provide that type of care. Family homes in Region 1 not currently serving children with subsidies were the most willing to provide care to children with subsidies at 80.8 percent. Overall, 73.1 percent of family homes not serving children with subsidies were willing to provide care to children with subsidies.

Table 36: Family Homes Willing to Serve Children with Child Care Subsidies by Region, 2012

Region	Percent Serving Subsidized Children	Percent Not Currently Serving, but Willing to Serve Subsidized Children
1	72.0%	80.8%
2	77.0%	74.7%
3	59.2%	76.0%
4	59.0%	64.8%
5	50.9%	77.1%
6	55.1%	73.5%
All Family Homes	62.8%	73.1%

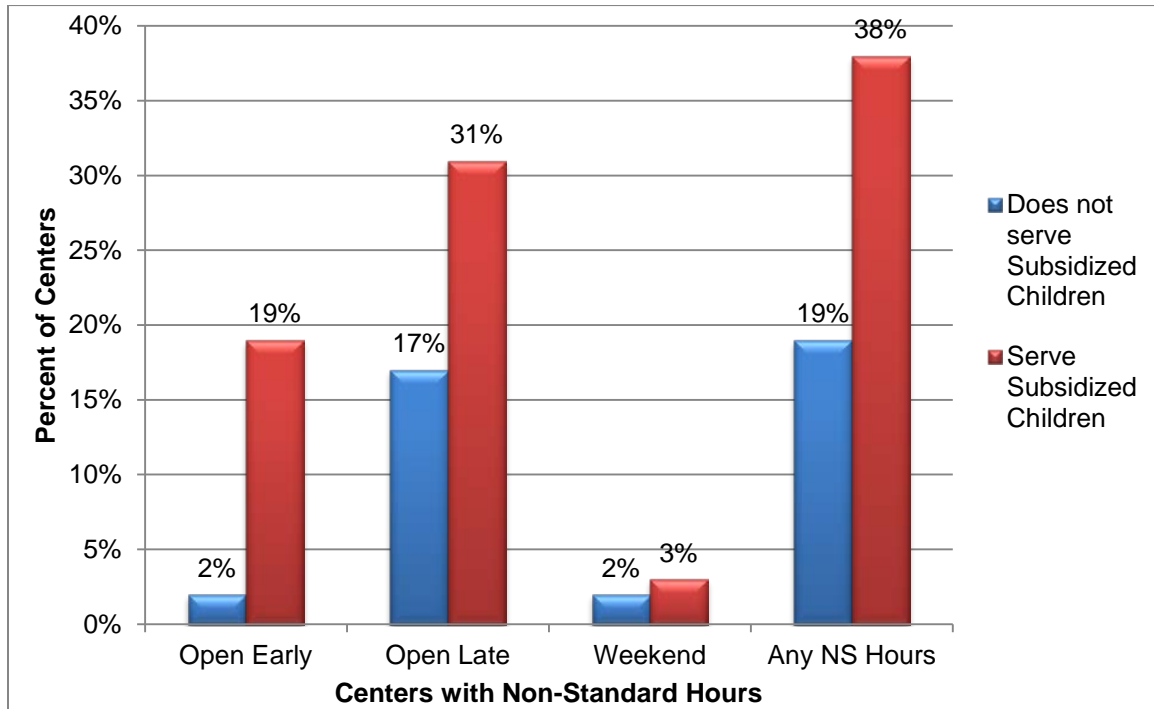
The data in Figure 18 indicated family homes that accepted children with subsidies were more accommodating of parents who worked non-standard work schedules than family homes that did not take children with subsidies. This was especially true for weekend (44 percent versus 10 percent) and any non-standard (NS) work hours (67 percent versus 22 percent). If parents were looking for a family home that had a NS work schedule, they were more likely to find it in a family home that served children with subsidies. In Figure 18, any NS hours included opening before 6 a.m., closing later than 6 p.m., or were open on a Saturday or Sunday.

Figure 18: Percent of Family Homes with Non-Standard Hours by Subsidy Status, 2012



Like family homes, centers that accepted children with subsidies were more accommodating of non-standard (other than Monday through Friday, 8 a.m. to 5 a.m.) work schedules than centers that did not take children with subsidies. However, regardless of serving children with subsidies or not, only a few centers (2 to 3 percent) were willing to open during weekends.

Figure 19: Percent of Centers with Non-Standard Hours by Subsidy Status, 2012



CHAPTER 9: EXPERIENCES WITH LICENSOR

Overall, the experiences with licensors were quite favorable in areas such as receiving timely information on licensing policy changes, getting answers to providers' questions, reasons behind licensing regulations, and suggestions on complying with the regulations. Less than 8 percent of participants from centers indicated that they were uncomfortable calling their licensors. Eighty-one percent of center providers stated they received timely information on changes to licensing policies; 90.1 percent agreed that the licensor clearly explained the reasons behind the licensing regulations at the most recent licensing visit; and 93 percent believed that the licensor clearly explained what the center needed to do to comply with the regulations.

Table 37: Distribution of Responses Regarding Attitudes and Experiences with Licensor among Child Care Centers, 2012

Child Care Centers	Strongly Agree	Agree	Disagree	Strongly Disagree	No Opinion
You are comfortable calling your licensor when you have questions about regulations.	57.4%	34.2%	3.9%	3.7%	0.8%
You receive timely information on changes to licensing policies.	31.9%	49.4%	12.4%	4.5%	1.8%
At your most recent licensing visit, the licensor clearly explained to you the reasons behind the licensing regulations.	49.7%	40.4%	6.1%	2.0%	1.7%
The licensor clearly explained to you what the center needs to do to comply with the regulations.	54.5%	38.5%	4.0%	1.3%	1.7%

The majority of family home participants had positive experiences with their licensors and had no hesitation in calling their licensors, received timely information on licensing policy changes and clear explanations and suggestions from their licensors. Only 6.9 percent of participants didn't feel that they were regarded as knowledgeable about, and a professional in, the field of child care by their licensors.

Table 38: Distribution of Responses Regarding Attitudes and Experiences with Licensor among Family Home Providers, 2012

Family Homes	Strongly Agree	Agree	Disagree	Strongly Disagree	No Opinion
You are comfortable calling your licensor when you have questions about regulations.	42.0%	45.3%	7.2%	4.0%	1.4%
You receive timely information on changes to licensing policies.	21.2%	57.5%	13.1%	6.5%	1.7%
At your most recent licensing visit, the licensor clearly explained to you the reasons behind the licensing regulations.	36.0%	52.7%	6.7%	2.2%	2.4%
The licensor clearly explained to you what the center needs to do to comply with the regulations.	41.4%	51.3%	4.2%	1.4%	1.7%
The licensor regarded you as knowledgeable about, and a professional in, the field of child care.	42.9%	48.9%	4.8%	2.1%	1.3%

Figure 20: Attitudes and Experiences with Licensors by Centers

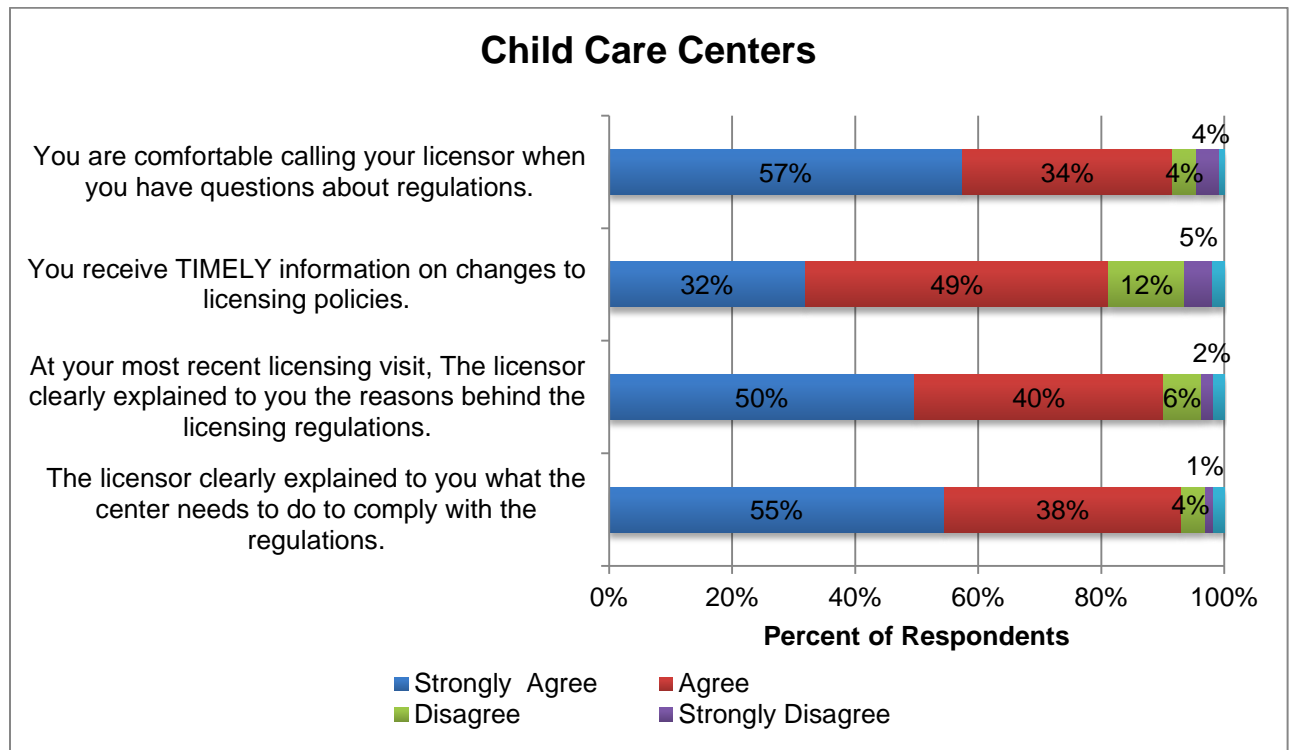
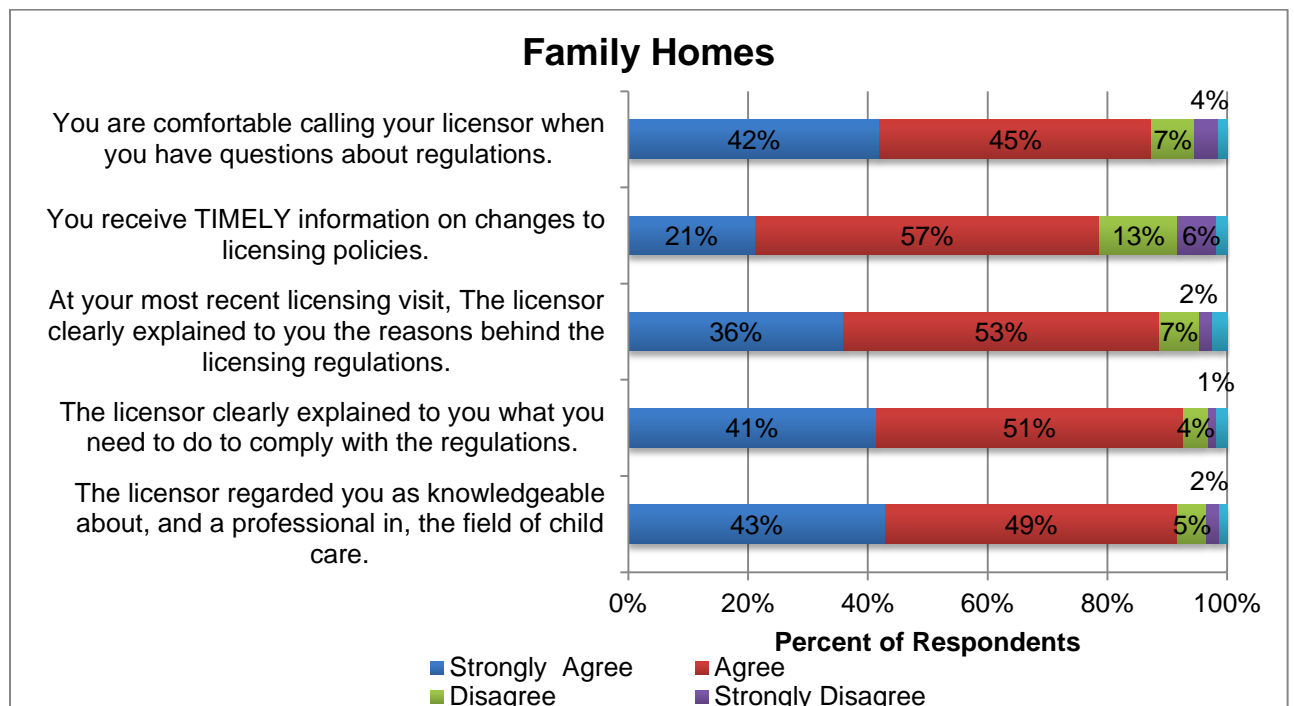


Figure 21: Attitudes and Experiences with Licensors by Family Homes



Center providers, compared with family home providers, were more likely to call a licensor in the previous year. On average, center providers called their licensors 9.3 times compared to 4 times for family homes providers in the previous year. Family home providers were more likely to receive a response from their licensors within the same day of inquiry (centers: 14.8 percent; family homes: 34 percent). 85.2 percent of center child care providers had to wait for one or more business days for their licensors to return calls whereas 66 percent of family homes had to wait for one or more business days for their licensors to return calls.

Table 39: Experiences with Calling Licensor by Type of Facility, 2012

	Average	Response received the same day as inquiry	Response received 1 or more Days after inquiry
<i>Child Care Centers</i>			
Number of Times Called Licensor, Previous Year	9.3	--	--
Number of Business Days for Call to be Returned	1.9	14.8%	85.2%
<i>Family Homes</i>			
Number of Times Called Licensor, Previous Year	4	--	--
Number of Business Days for Call to be Returned	1.5	34.0%	66.0%

CHAPTER 10: CHILD CARE PROVIDERS' FEEDBACK

The last question of the 2012 Licensed Child Care Survey for both family homes and centers asked the participants to provide any further comments or questions either about this survey or for DEL. Just over 14 percent of center survey participants and 14.4 percent of family home survey participants answered this question. The fact that the number of comments was larger than the number of participants who answered this last question showed that some participants commented on more than one area. Table 40 shows the feedback categorized into different areas.

Table 40: Center and Family Home Provider Feedback

Topics	Centers		Family Homes	
	#	%	#	%
Experiences with Licensor	24	13.3%	29	10.9%
DEL	18	9.9%	40	15.0%
Special needs	9	5.0%	4	1.5%
Reimbursement rates	15	8.3%	10	3.7%
Rules and regulations	23	12.7%	63	23.6%
Thank you/misc	12	6.6%	22	8.2%
STARS training	5	2.8%	3	1.1%
Pay and benefits	3	1.7%	17	6.4%
Educational opportunities and workforce	6	3.3%	11	4.1%
Survey related	22	12.2%	26	9.7%
QRI's	4	2.2%	7	2.6%
MERIT	7	3.9%	5	1.9%
Other	33	18.2%	30	11.2%
<i>Total comment count</i>	<i>181</i>	<i>121.5%</i>	<i>267</i>	<i>131.5%</i>
<i>Total response count</i>	<i>149</i>	<i>14.1%</i>	<i>203</i>	<i>14.4%</i>

Experiences with Licensor

Providers indicated they wanted licensors to work more with the providers and not just be there to monitor them. Overall, center providers were very pleased with their licensors, but there were a couple of exceptions. Family home providers wanted licensors to be more respectful, treat each provider equally, respond more quickly, and have the option to request a new licensor. Moreover, lack of understanding by the providers and lack of consistency when interpreting Washington Administrative Code (WACs) were also mentioned by providers. Family providers had more negative comments regarding licensors than center providers. Some of the comments were selected as following:

Child care providers don't have issues with the regulations. I have issues with how the regulations have been enforced and the respect. I miss the ongoing communication with licensors. I think it's important to work hand in hand. Rather than having an agency that its only concern is to regulate. There is a lack of fair treatment and lack support.

I wish DEL and Child Care Providers could truly share a partnership in children's learning, but with all of the current regulations this will never happen. The system is designed for monitoring NOT partnering.

It seems that the WACs are interpreted differently by different people. When I have talked with my licensor it seems she has never worked in a childcare center before or does not remember the challenges we face.

It would be helpful if the licensor explains the reason for visit and what she is doing or gives you feed back before leaving our daycare.

Department of Early Learning (DEL)

About half of providers had positive feedback on DEL's performance, especially when it came to supporting children. However, some providers complained about not being able to reach a real person in DEL, waiting too long for DEL's responses, or not having a help line when they have questions, while others appreciated the provider line. Providers criticized the amount of paperwork needed to get licensed and the lack of information on reporting requirements. Some even suggested that DEL should obtain outside recommendations or hear from families of the children they care for on how to improve. Some of the comments were selected as following:

It seems like years ago when I started in this field, the focus was on children and providing care. It seems as though DEL has lost that focus. It seems like it's all about rules and regulations. The focus is not on the care, families, or children anymore.

I support WA DEL and realize how important the work they do is. However, I cannot help but feel a fairly strong antipathy towards them - they have these great ideas, but feel that we are thrown to the wolves as far as support for implementation.

Although I do not share this view, many of my colleagues view DEL as something to get around. I continue to view DEL as an important partner, but with that it was a more supportive and less difficult relationship.

I really appreciate the provider line they have. They really help when I need any help about the people. They are very polite and I get a lot of information from

them. Half the time you can't find out anything from the parents because they're not given any information either.

DEL should go off their families. Call my customers because I do my best to make them happy. It can be very overwhelming when they come in. If you are doing a nice job they should recognize that.

DEL must stop destroying the trust that has been built over many years

DEL is Not focused on what is best for children or providers.

DEL is making things worse at every turn.

The bottom line is that DEL does not make me or other quality providers want to stay in the job. I stay in it for financial reasons and to be able to stay at home with my own son. If I didn't have to be licensed to take care of children I wouldn't, just so I can avoid having to interact with DEL. I wish that DEL would just go away or would come together; to me they personally are not professional and not qualified. It is really tiresome to know that they always view us as guilty and never innocent.

Educational opportunities and workforce

About 4 percent of all providers commented on the current educational opportunities and almost all of them requested more classes, seminars and conferences. They felt like they didn't get enough training on accommodating children with special needs, the classes needed to be held more often, and teachers and providers didn't have access to affordable or free training. Sample comments were selected and shown as following:

We are looking forward to the training you will provide, but we also hope that you will consider the individualization of each child development center. We are concerned for the smaller child care centers -- how they will comply with all of the new requirements.

I feel very strongly that DEL should provide the education and certifications it requires, at no cost to the child care provider.

DEL is doing a great job .It would be great if we could have more free meetings in order to keep us more updated, learn more, and share our experiences with other childcare providers in order to provide the best care.

I hope we (as a provider) can get some education materials discount and get education - classes discount somehow.

We would like to have some information or connections to high school students who wants to volunteer during summer.

Pay and benefits

Among the few providers commenting on pay and benefits, lack of funding was the main issue for the providers. Some providers were only able to pay their employees minimum wages and therefore weren't able to keep good teachers. Providers hoped DEL would help them provide insurance to their employees. Sample comments were selected and shown as following:

We need to be paid at a higher rate than what the state pays now and we also should be getting health benefits as well since we are forced to be union.

It would be nice if there was a benefits package for in-home daycare providers such as medical and dental insurance.

I do not have the answers but the biggest problem in Early Childhood education is the lack of benefits and wages that come with being an early childhood educator. I live in a rural community. I cannot charge much for private pay. People cannot afford it so they just take their children to unlicensed or relative care. I cannot afford to pay my staff what they are worth or offer benefits. How do I get quality workers? We continue to ask our teachers to increase their education yet who will get a degree to work minimum wage with no benefits? As I said before I do not have the answers but I know what the problem is.

Rules and regulations

The issue mentioned most by the 13 percent of centers and 24 percent of family providers commenting on the rules and regulations was that the current regulations were too excessive and a lot of the policies may sound good in an office setting but didn't apply to real world. Most issues revolved around recent WAC changes and the requirement for a GED.

Certain rules were mentioned and perceived as not productive, such as the GED requirement, emergency preparation, the permission to use sunscreen and hand sanitizer, and the safety requirement for small climbing structures. Also, given the size of WACs, providers should be able to get free copies of WACS instead of having to download it from the Internet. Sample comments were selected and shown as following:

They should send information of new changes on regulations in the mail, and send information on what needs to be added to the manual that we give to parents.

I have felt at times that the regulations were a little silly or nonsensical but I do understand that the purposes are to keep the children safe so I will cooperate.

The new WAC for emergency preparation I think goes a little too far, but all I can do is comply with the best of my ability. The person I work with is very nice, but I've heard stories about other people who have been racked through the coals.

I think there are a few WACs that are ridiculous. For one thing....we can no longer take our school age children to spray parks where the water does not pool...because there is no life guard. Nor can we take our children to a hike along the beach to look for crabs and other sea life. We can no longer have equipment that has a platform that is over 4 feet off the ground unless we dig down and remove dirt to make the new depth 9 inches. We have to have bells on all our doors. We are not allowed to have shampoo or cream rinse or hand lotion in our bathrooms but can have liquid hand soap...what is the difference. We are expected to helicopter around the children never letting them out of sight and/or sound. None of these new rules allow for those that just do after school children or account for the fact that we know our children and that we do watch them. My play room is one big room with a bathroom off the playroom. I am very aware of what is going on. I am sorry but I think these and several more are wrong.

DEL & the new WAC's take away the 'home' in an In-Home child care. There are so many new rules that take away the feel of a home. I am in business for myself, therefore I should be able to decide, for example; when my garbage needs to be taken out. I do not need the state telling me to take it out once a day. No other business owner has someone else telling them when to take it out! Ridiculous. (Please know there are MANY more that are just as ridiculous that I don't have space to mention here).

I fully support and understand the need for safety regulations. I had my daughter in in-home childcare years ago, and know the value in some. I however, do not believe the State of WA has to have regulations on EVERYTHING in the 92 pages of WAC's. In addition to that, so many providers live in fear of their licenser showing up & nit-picking things & being shut down. This is not the way to run a department that is suppose to SUPPORT & ASSIST providers.

I strongly feel that the State of WA is trying to slowly edge out home providers. Why else would they require so many new changes (which cost a TREMENDOUS amount of money to be compliant, not to mention the TIME!), and only allow a couple of months to do it in. Mind you, providers don't make much money per hour then having to put in hundreds of additional hours & hundreds of dollars just to be compliant. Again, RIDICULOUS!!!!

Reimbursement rates

The comments regarding reimbursement rates have dropped since 2010. Of the 8.3 percent of center providers and 3.7 percent of family providers who commented on the reimbursement rates, almost all providers criticized the state child care subsidy rate as being unrealistic and too low. For example, the low reimbursement rate for children with special needs was hurting the providers. The low rates sometimes forced providers not to take children with special needs in order to keep the child care centers and family homes open. Some providers claimed that the state should pay the same amount of money for the same type of work regardless of the region in which the centers or family homes were located. A couple examples are shown as following:

We do not accept state funded families because the rates are so low, even compared to the rates of centers. If Washington adopted the policy that other states have, such as Arizona, where the states pays a portion of the childcare tuition and parents are responsible for the rest no matter where the child is enrolled or the rate is, then I feel that more providers would accept state funded families. This would also encourage providers to feel more professional in their chosen career and to do a better job in caring for children and striving to provide the best care for the children in their care.

Childcare subsidies should be raised. I am very inexpensive compared to my colleagues near me and the rates aren't high enough to cover my normal rate. I don't always accept subsidized children because of this.

Subsidies for child care for families is too low, hinders quality of child care parents are going to be able to find. If the state's going to pay child care for families in need, state should pay child care or families should pay the difference.

The first reason for not accepting subsidized children is that they don't pay for vacation time or sick leave and we have a monthly tuition, it is a school year (September to mid-June) tuition that is divided by nine and a half equal parts. For example, at Christmas when we are closed for two weeks DSHS would only reimburse us for two weeks when we are in session and we cannot operate like that. So if I am going to take a subsidized child, I want to be reimbursed on a consistent monthly basis, not according to the months they don't use. The second reason is I want a school year commitment, September through mid-June. I want my tuition to be paid, they can give me a months' notice. The cost of keeping the records that they require is too high.

The amount that the state is paying for subsidies is not keeping up with childcare costs. There are alot of centers closing and it is all because of money. Minimum wage keeps going up but not rates for kids and that will hurt childcare providers.

Would be able to take more families on DHS if the rates were competitive to somewhat what we charge.

The State Training and Registry System (STARS) training

Only about 3 percent of center providers and 1 percent of family providers commenting mentioned STARS training when asked to give further comments. Some providers complained about the cost for taking STARS classes every year and hope that DEL would help pay for their employees' training, or that costs were too high for the training. Providers were also concerned that while the STARS process is available online, it is incomplete. Sample comments were selected and shown as following:

The DEL has postponed approving new STARS trainers for over 18 months, and even after reopening the process it is incomplete online. Very frustrating.

Worked here 14 years, have a degree in Education and we are required to take the same STARS classes over and over its redundant and unnecessary. Should be a way you can test out or not be obligated to take 10 hours of classes every year.

The need for many individuals to establish an email account, get a STARS number, complete the profile, send in official transcripts and send in marriage or divorce decrees to establish name changes. Also, the cost overall and the need for fingerprinting and the additional cost for first-time applicants and volunteers. The concerns with becoming a STARS-approved trainer now.

I don't like that if anyone is in the house but they're not helping, they still have to go through training. I don't think it's necessary to write up a handbook for our daycares. I am against family members having to have STAR numbers.

Special needs

Only about 5 percent of center providers and 1.5 percent of family providers commenting mentioned issues with special needs children and care. Some were concerned that special needs rates were too low for the extra care required. A few providers would like to have more training in taking care of children with special needs. Additional training would allow them to feel more comfortable in caring for children with special needs. Sample comments were selected and shown as following:

Additional help for teachers struggling with students with special needs is greatly needed. More training available and additional services available to provide the staffing needed to help these children.

I would like to know more about different rates for special needs kids. We find ourselves having a lot of special needs kids and it would be helpful to hire someone with experience in this area working with them.

The special needs pay needs to be looked into because I really bonded with this child and I waited for like a year before I let this kid go. The kid was really doing well when I let her go as she was doing really well at my facility.

DEL needs to pay much more for special needs children to support centers and their families.

Quality Rating and Improvement System (QRIS)

About 2 percent of center providers and 3 percent of family providers commenting mentioned issues with QRIS and its implementation. Some were concerned that not participating in QRIS would impact their business negatively. Some wanted more information about QRIS. Others were unsure about participation in QRIS. Sample comments were selected and shown as following:

They say QRIS is optional, but in a way it's not optional, because when people go to look up your daycare it looks bad if you don't do it. So that seems a little problematic for non English speaking daycare providers if you choose not to do it.

I strongly disagree that the QRIS is using a 0 rating for those who wish to not participate in that program. That has nothing to do with our rating or abilities if we chose to participate. There should be a "does not participate in this program" option rather than a lower listing. It's slanderous and unfair. If nothing else, there should be a TRUE opt out option. It doesn't matter whether I was the best provider in the country. I think it's vain and arrogant.

I would like more information about QRIS.

I'd like to say that because I have staff who have been here for so many years, I don't want to force them to go back to get a degree, because of that, we are not fully recognized by QRIS. That is my one complaint.

If our center does not participate in the QRIS program, how will that effect us when a parent goes to check our centers record out on the DEL website?

Managed Education and Registry Information Tool (MERIT)

About 4 percent of center providers and 2 percent of family providers commenting mentioned issues with MERIT. Most were concerns about not being able to use the

MERIT website or that when on the site it is not very user-friendly. Sample comments were selected and shown as following:

With the new MERIT registration process, my employees have spent a lot of time trying to get registered, but it's very user-hostile. Emails and phone calls are not returned and it's creating ill-will.

The Merit program, currently, has been a disaster and extremely difficult to get people switched over.

MERIT has to be more user-friendly and accessible. We need more staff at DEL to handle all the changes and needs to updates; it seems to be grossly understaffed.

Can somebody fix MERIT so we can actually use it? I am signed up but anytime I want to update anything (like CPR or First Aid) it will not let me update it.

I do find the DEL website difficult to use now. Things are harder to find as a provider. It is now all for the parents. I also do not like that the merit website posts incorrect information that could cause a parent to not choose my day care and I cannot find anyone to change it. I have requested but no one will comment.

Other

Providers commented on a variety of other issues that did not belong to the broader categories. These issues were summarized as following:

- DSHS funding concerns:

Children who qualify for DSHS child care should not become "revolving door kids". A child should be funded until the parent can afford to fees or the child attends public school. Their early childhood education should not be interrupted.

With the large jump of minimum wage increase, there has not been an increase in funding for DSHS, and this severely hurts centers that are predominately DSHS clients.

- Spanish language materials:

Why is it that in Tri Cities more than 90% of us child care are Hispanic and speak Spanish and our licensors are bilinguals why do they not provide information in Spanish?

Yes, for DEL to provide their new information to both English/Spanish child care centers and their providers.

- Unionization

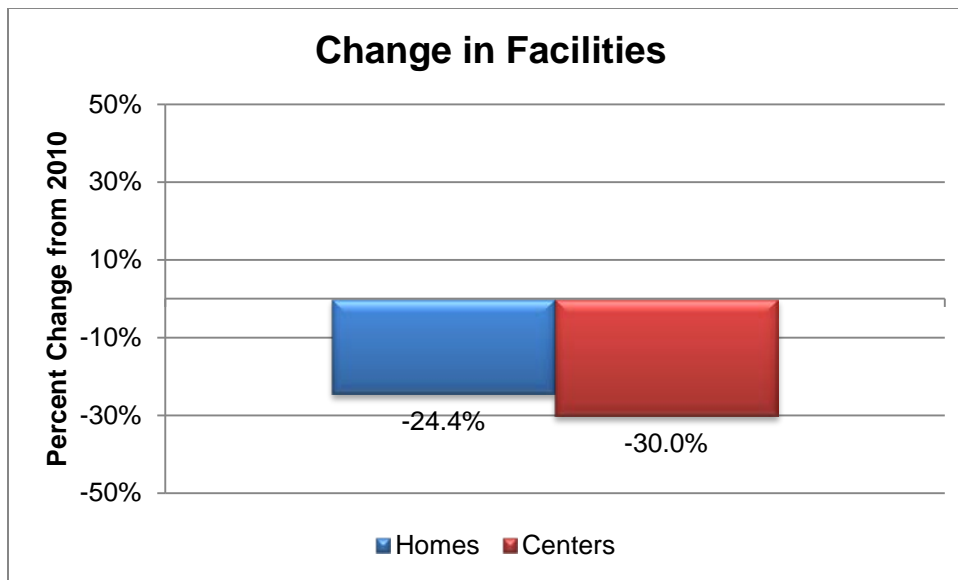
Survey didn't ask about the union which is why I don't take subsidized. Gov. Gregoire made everyone part of the union who takes care of subsidized kids. It makes no sense because we are private household businesses. To take care of state paid kids you have to be part of the union and get less money than you would. Hate the union and they always give more money to the union and to the liberal party which is crooked. Basically they're stealing my money.

We need to be paid at a higher rate than what the state pays now and we also should be getting health benefits as well since we are forced to be union.

CHAPTER 11: COMPARISON OF FINDINGS FROM RECENT CHILD CARE SURVEYS

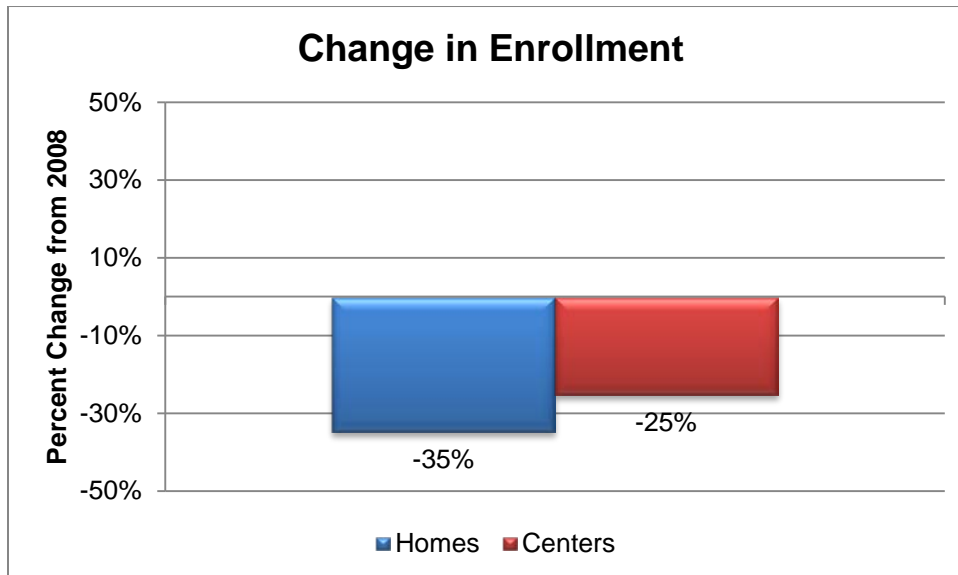
Between 2010 and 2012, the number of child care centers had decreased from 2,134 to 1,494, representing a 30 percent decrease. Family homes decreased from 5,504 homes in 2010 to 4,162 homes in 2012, representing an increase of 24.4 percent. The downturn of the economy and the high unemployment rates may have motivated some parents to pull their children from child care as the overall expense increased, forcing centers to close. Overall, the number of child care facilities decreased over the last ten years from 9,456 facilities in 2002 to 5,656 facilities in 2012.

Figure 22: Percent Change in Number of Child Care Facilities by Type of Facility, 2010 versus 2012



Both centers and family homes had a decrease of the number of children enrolled from 2010 to 2012. Family homes had 13,413 fewer children enrolled, accounting for 35 percent decrease while centers had 34,428 fewer children enrolled, accounting for a 25 percent decrease.

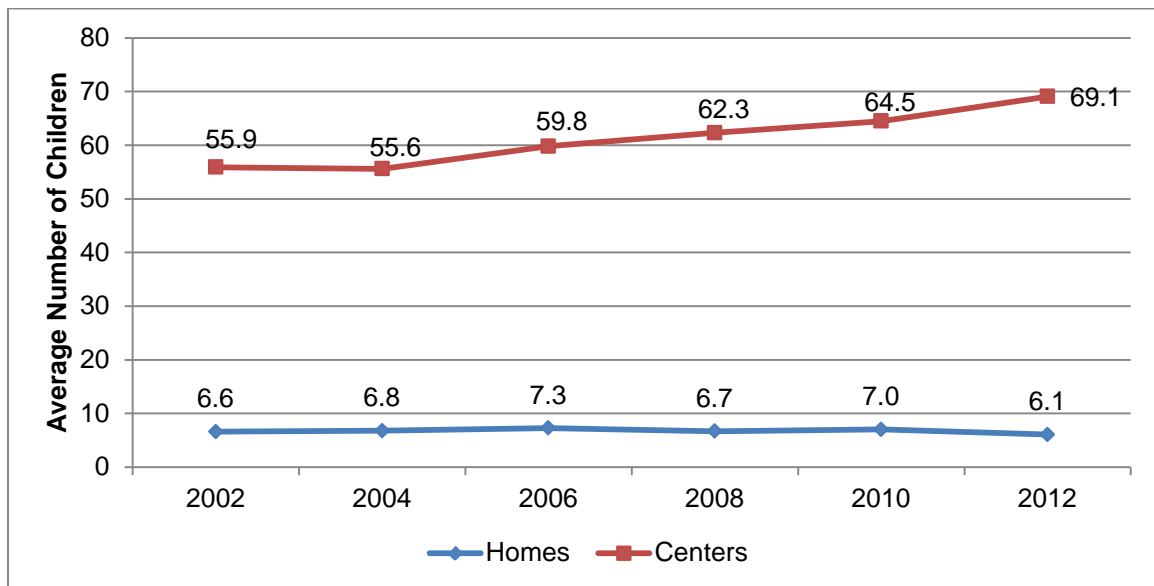
Figure 23: Percent Change in Number of Children in Licensed Care by Type of Facility, 2010 versus 2012



Since 2002, centers increased their average enrollment to accommodate more children. On average, each center could provide child care services for 69.1 children in 2012 compared to 55.6 children in 2004. This increase corresponded to the decrease in total number of children enrolled shown in Figure 23 and decrease in total number of centers shown in figure 22.

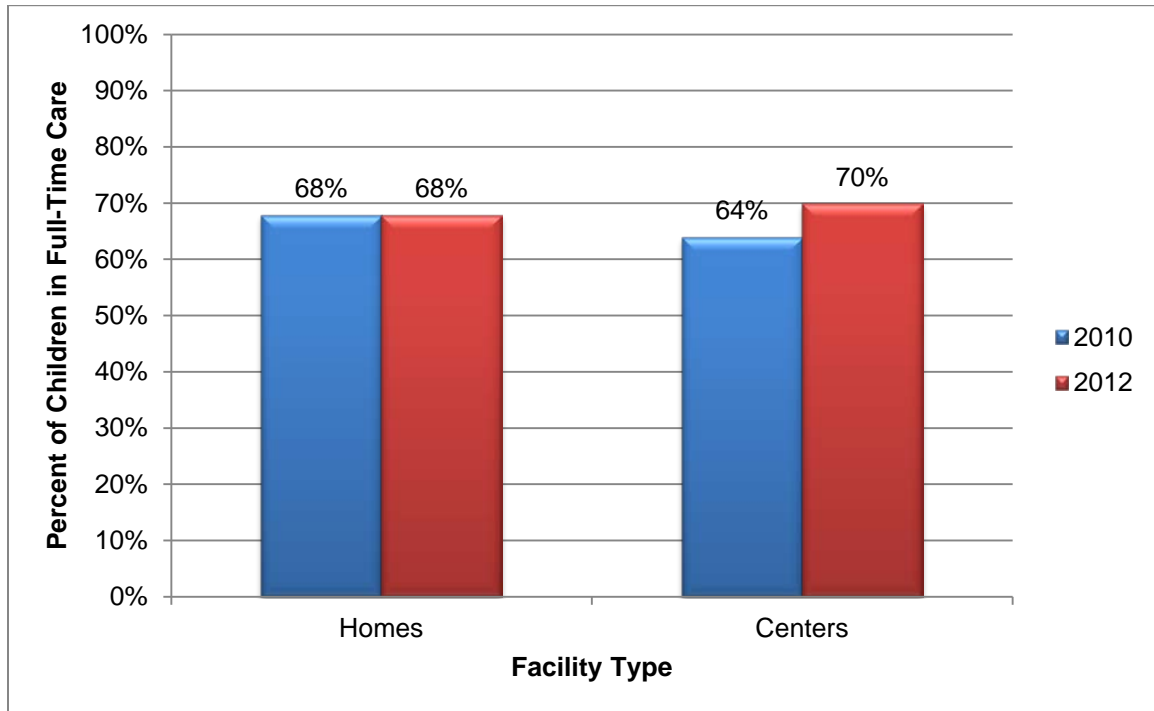
The changes in the average number of children in family homes had been less significant compared to the changes in centers. Overall, a family home accommodated fewer children in 2012. In 2002, a family home on average could accommodate 6.6 children which decreased to 6.1 children in 2012. The highest average occurred in 2006, at 7.3 children.

Figure 24: Average Number of Children in Care per Facility by Type of Facility, 2002 to 2012



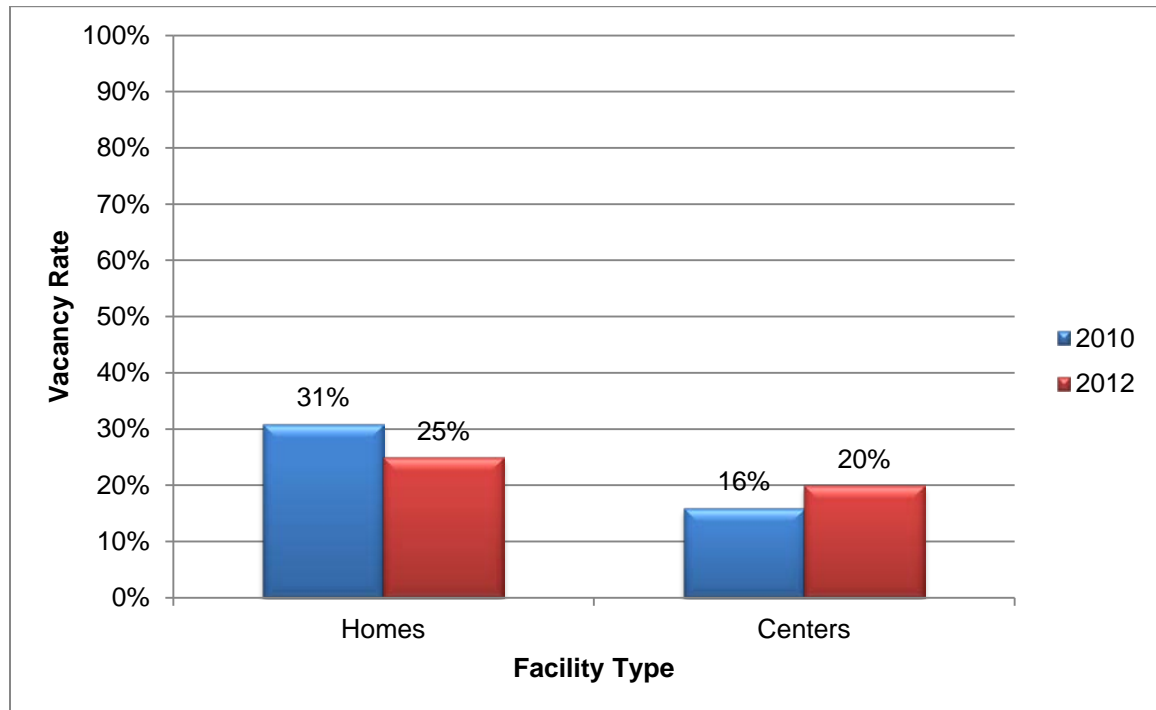
The percent of children in full-time care in family homes stayed the same during the past two years at 68 percent while the percent of children in full-time care in centers increased 6 percent, to 70 percent in 2012.

Figure 25: Percent of Children in Full-Time Care by Type of Facility, 2010 versus 2012



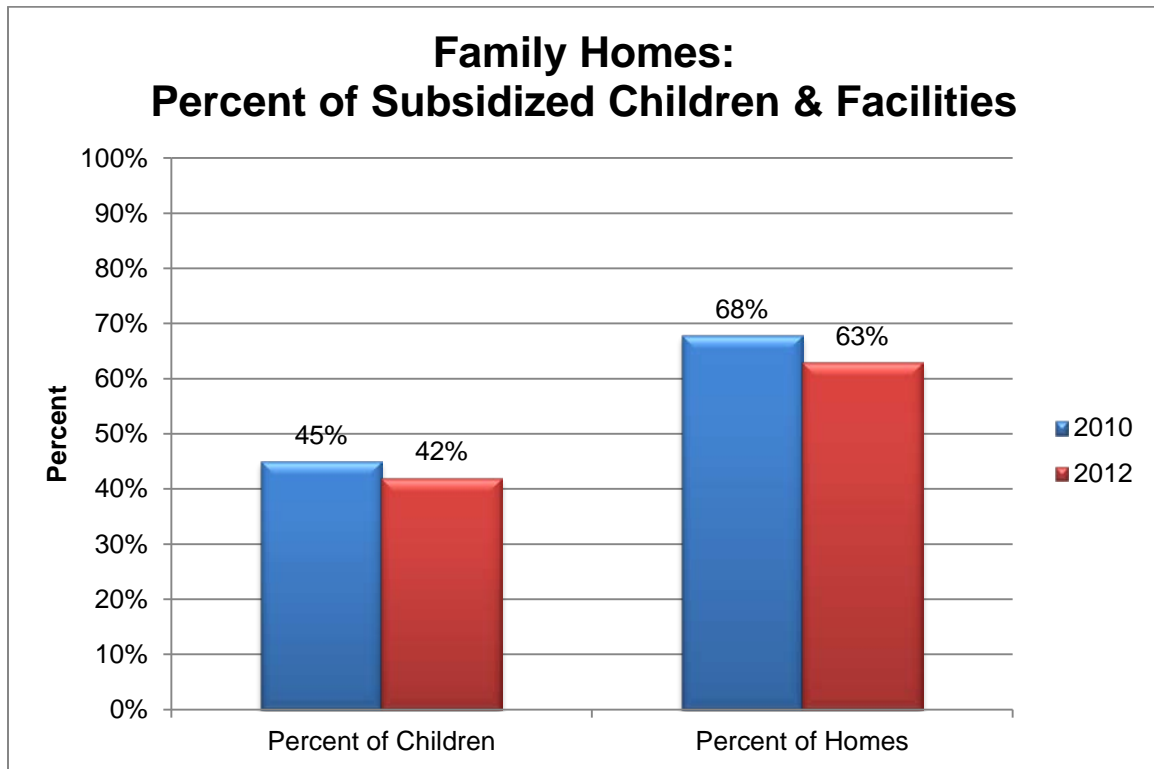
Family homes had decreased vacancy rates, while centers had increased vacancy rates during the past two years. The vacancy rate for centers increased 4 percent, from 16 percent in 2010 to 20 percent in 2012. The vacancy rate in family homes decreased 6 percent, from 31 percent in 2010 to 25 percent in 2012. Family homes' vacancy rate in 2012 was 25 percent, almost twenty five percent higher than the vacancy rate of centers, which was 20 percent.

Figure 26: Vacancy Rates by Type of Facility, 2010 versus 2012



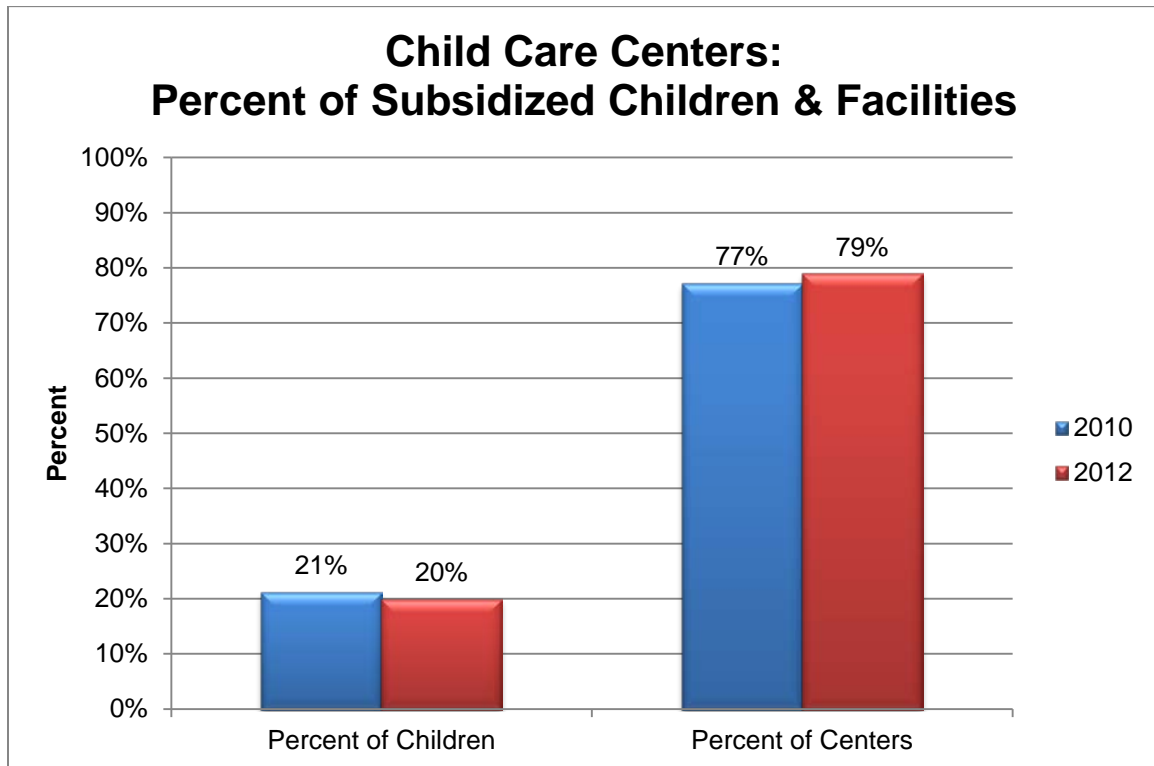
From 2010 to 2012, the percentage of family homes that served children with subsidies decreased by 5 percent. During that same time period, the percentage of children with subsidies cared for in family homes decreased by 3 percent. In 2012, 63 percent of family homes served children with subsidies while children with subsidies represented 42 percent, of all children in family homes.

Figure 27: Percent of Children with Subsidies among Family Homes, 2010 versus 2012



The percentage of centers that served children with subsidies increased from 77 percent in 2010 to 79 percent in 2012. The number of children with subsidies compared to all children in center care decreased from 21 percent in 2010 to 20 percent in 2012. The decrease in the percentage of children with subsidies in centers is similar to that found with the family homes. However, the percentage of centers that accepted children with subsidies contradicted the trend found in family homes in the past two years.

Figure 28: Percent of Children Receiving Subsidies among Child Care Centers, 2010 versus 2012



Parents seeking early morning child care were more likely to find care in centers compared to family homes. The overall percentage of centers that opened before 7 a.m. remained about the same from 2010 to 2012, at around 60 percent. The percentage of family homes that opened early in the morning increased slightly, 49 percent in 2010 and 56 percent in 2012. In 2012, 78.3 percent of centers were open after 6 p.m. compared to 40.7 percent of family homes in 2012. From 2010 to 2012, the percentage of centers that were open until late evening increased by 1.5 percent. There was an increase of 5.8 percent of family homes open late from 2010 to 2012.

While a few (0.4 percent) of centers were open 24 hours, 16.4 percent of family homes were open 24 hours a day in 2012, an decrease of 3.1 percent during the last two years. In 2012, half (51.5 percent) of family homes provided weekend child care compared to only 5.6 percent of centers. The percentage of family homes opened during weekends increased slightly (2.9 percent) while that of centers increased 2.1 percent during the past two years.

Table 41: Child Care Availability by Type of Facility, 2010 versus 2012

	Centers		Family Homes	
	2010	2012	2010	2012
<i>Mornings</i>				
Before 6 a.m.	10.7%	16.1%	17.3%	22.8%
6 to 7 a.m.	49.2%	46.1%	31.7%	33.2%
<i>Evenings</i>				
6 to 7 p.m. *	72.8%	72.0%	26.4%	28.5%
7 to 8 p.m. **	1.5%	3.0%	2.5%	3.9%
Later than 8 p.m. ^	2.5%	3.3%	6.0%	8.3%
Open 24 Hours	0.2%	0.4%	19.5%	16.4%
<i>Weekends</i>				
Saturday	2.9%	4.3%	29.7%	30.7%
Sunday	0.6%	1.3%	18.9%	20.8%

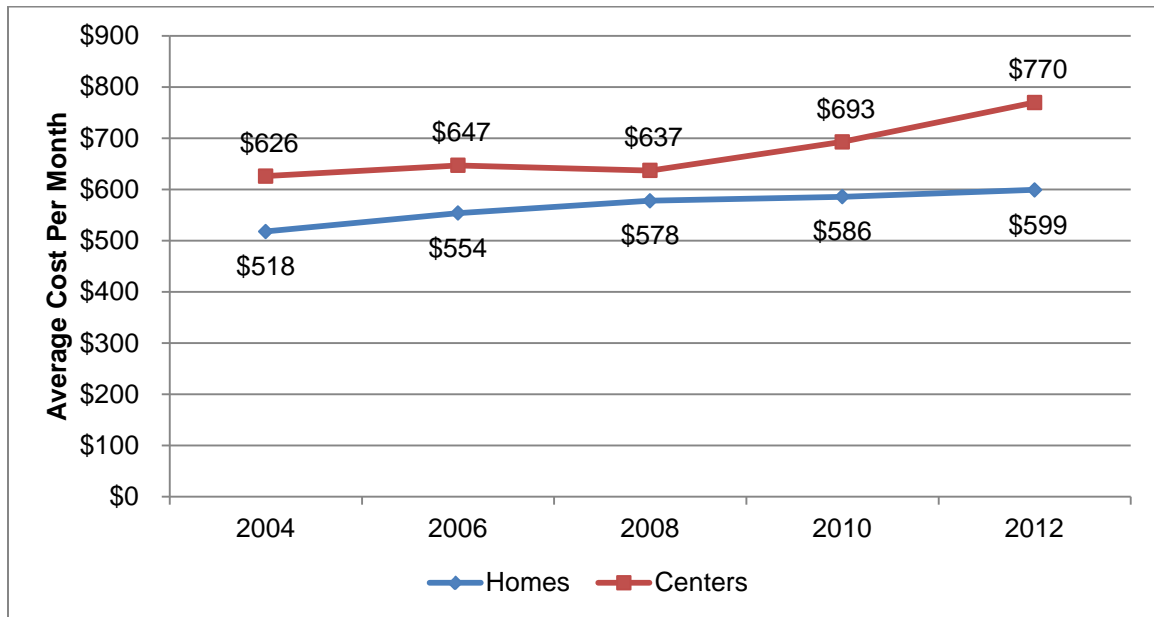
* Reported closing times from 6 p.m. to 6:59 p.m.

** Reported closing times from 7 p.m. to 7:59 p.m.

^ Reported closing times of 8 p.m. and later

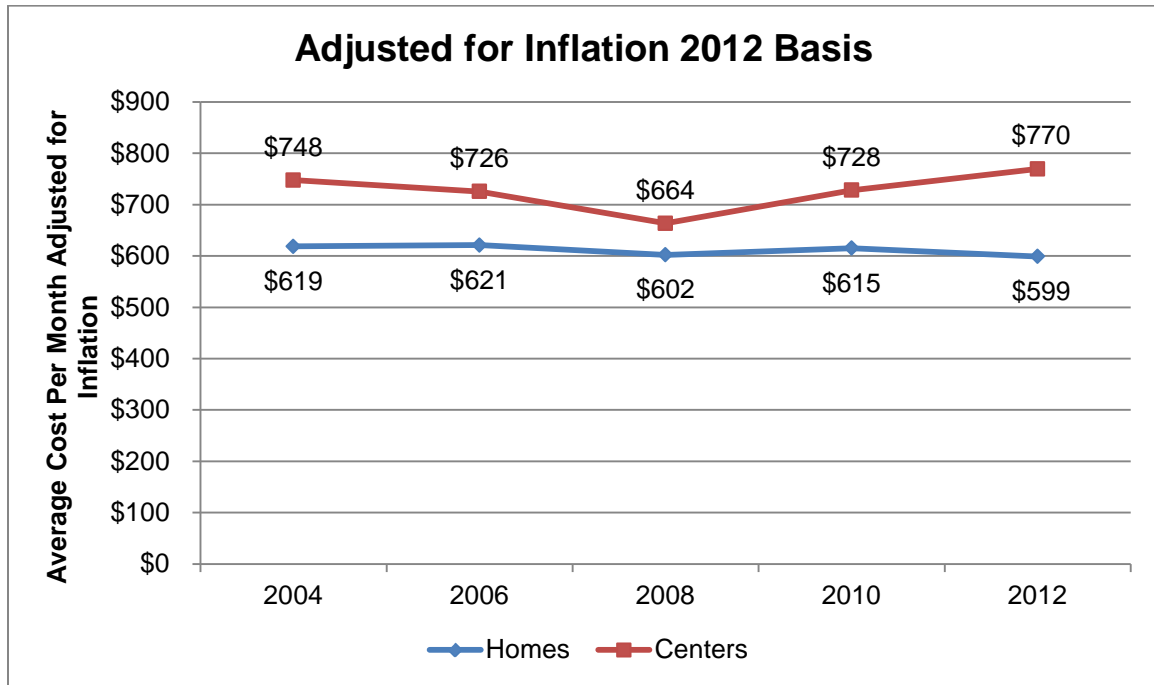
The average monthly child care rate for full-time child care, not adjusted for inflation, increased from 2010 to 2012. In family homes the rate increased \$13, or 2.2 percent and in centers the rate increased \$77, or 11.1 percent. The average rate per month for full-time child care for both centers and family homes showed an increasing trend since 2004 with an exception of center rates in 2008.

Figure 29: Average Rate per Month for Full-Time Child Care by Type of Facility, 2004 to 2012, Not Adjusted for Inflation



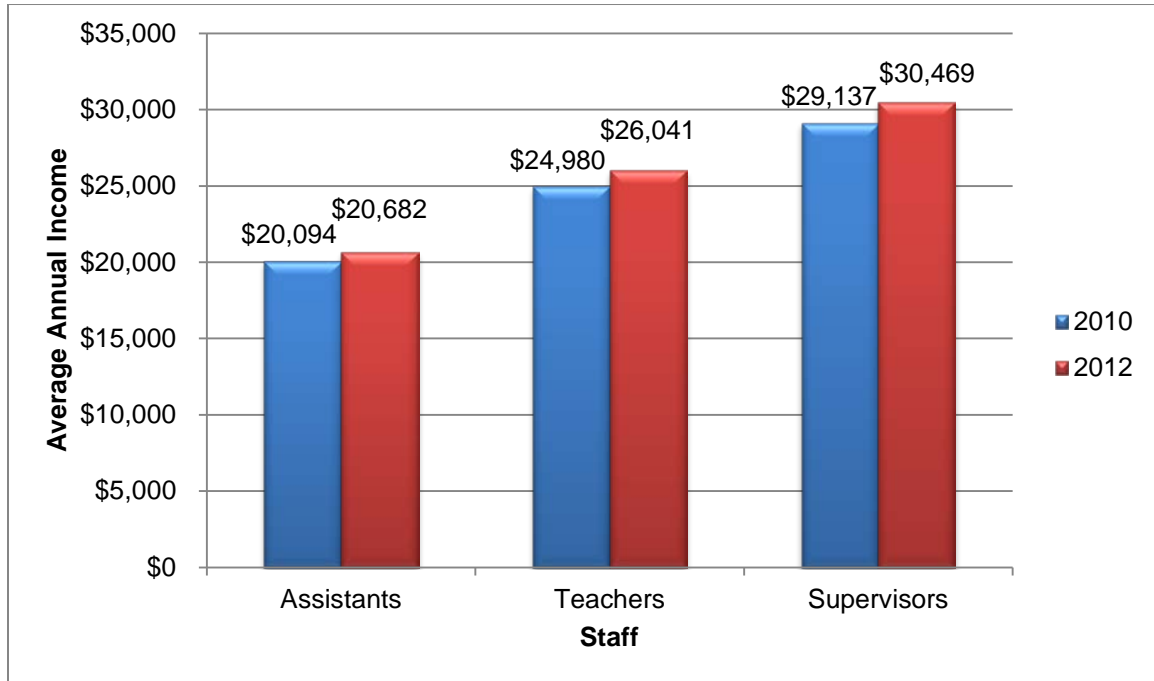
After the data was adjusted for inflation, the average rate per month for full-time child care in centers actually increased \$42, or 5.8 percent and the rate for family homes decreased \$16, or 2.6 percent, from 2010 to 2012. Overall, the average adjusted rate per month for full-time child care for centers has increased while family homes have decreased since 2004.

Figure 30: Average Rate per Month for Full-Time Child Care by Type of Facility, 2004 to 2012, adjusted for Inflation



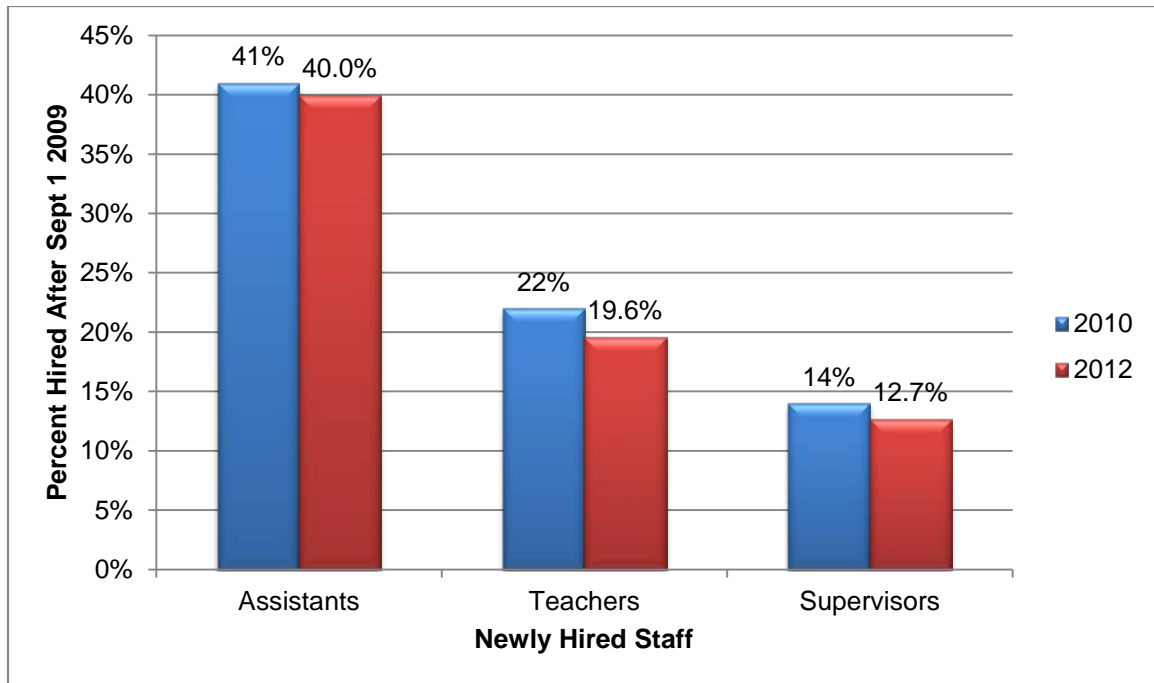
The average annual income for assistants and teachers increased since 2010. In 2012, assistants earned an average of \$1,723.50 per month, and teachers earned an average of \$2,170.08 per month. Supervisors' average annual incomes increased \$1,332, or 4.8 percent in 2012.

Figure 31: Average Annual Income by Type of Staff among Child Care Centers, 2010 versus 2012



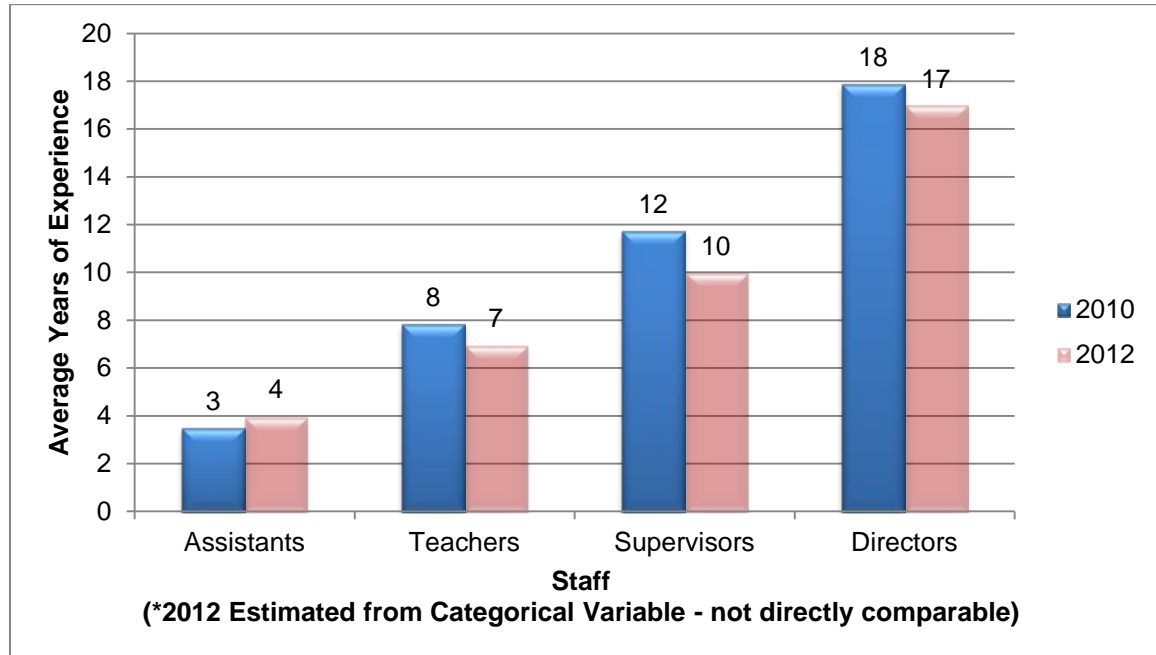
The turnover rate of assistants was higher than that of teachers and supervisors during the past two years; however, it declined slightly, at 40 percent, from 2010 to 2012. The overall turnover rate for teachers and supervisors was slightly lower in 2010 than in 2012. The turnover rate of teachers dropped 2.4 percent from 22 percent in 2010 to 19.6 percent in 2012; while the turnover rate of supervisors dropped 1.3 percent, from 14 percent in 2010 to 12.7 percent in 2012.

Figure 32: Turnover by Type of Center Staff, 2010 versus 2012



Overall, the average number of year's staff members worked in for a child care center decreased during the past two years. The higher the position of the center staff, the more years of experience he or she had. The average number of years directors worked in child care was 17 in 2012, which decreased 1 year since 2010. The average for supervisors was 10 years, which decreased 2 years since 2010. The average for teachers was 7 years, which decreased 1 year since 2010; and 4 years for assistants, which increased 1 year since 2010.

Figure 33: Average Number of Years of Paid Child Care Experience for Center Staff, 2010 versus 2012



*The 2012 questions related to this table were changed from a numeric response in previous surveys to a categorical response in 2012. 2012 numbers are estimated for comparison purposes.



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