



Georgia Department of Early Care and Learning

## **Georgia Child Care Market Rate Survey**

**2016-2017**

**Prepared by Care Solutions, Inc.  
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\*Copies of Spanish versions and screenshots of online survey forms available on request.

## **1. Executive Summary**

Care Solutions, Inc., a management consulting firm under contract with Bright from the Start: Georgia Department of Early Care and Learning (DECAL), conducted a survey of child care providers mid-fall of 2016 through winter of 2017 to determine local child care market rates and other information about child care providers in the state.

DECAL subsidizes a portion of child care expenses incurred by some low-income families and families receiving protective services. The survey data are used, in part, to assist the state in compiling a snapshot of early care and education and preparing the state's Child Care and Development Fund State Plan for Georgia, including the setting of child care reimbursement rates.

A strong effective response rate of 67% (with bad addresses removed from the calculation) was achieved for this survey among licensed child care providers, with an effective response rate of 55% overall (including license-exempt and informal child care providers), compared to 53% in 2013.

The federal Administration for Children and Families Office of Child Care has established the 75<sup>th</sup> percentile child care market rate as a benchmark for determining equal access to child care services for those receiving child care subsidies. Survey results indicated statewide 75<sup>th</sup> percentile site-based market rates for specific types of care and child age either did not increase or increased by up to 15% from the 2013 survey to the 2016-2017 survey, depending on the rate and age group category. For example:

- Licensed child care learning centers: 75<sup>th</sup> percentile rates for infants increased from \$173 to \$180 per week (4%); for three-year-olds, from \$150 to \$160 per week (7%); and for before- and after-school care (school age), from \$76 to \$85 per week (12%).
- Licensed family child care learning homes: 75<sup>th</sup> percentile rates for infants increased from \$135 to \$149 per week (10%); for three-year-olds, from \$125 to \$135 per week (8%); and for before- and after-school care (school age), from \$65 to \$75 per week (15%).

## **Survey Method**

In Georgia, child care is provided in a variety of settings: licensed child care learning centers (and, previously, group day care homes), exempt providers (such as school-based or faith-based child care programs), licensed family child care learning homes, and informal child care providers. The 2016-2017 Georgia child care market rate survey was made available to these providers on paper and online, in English and Spanish, in three versions: one for center-based programs, one for public school-based programs, and one for family/informal providers.

A list of more than 11,200 non-duplicated child care providers was compiled using lists (licensing and subsidized care) provided by DECAL. The survey protocol included multiple stages: an announcement postcard, email distribution of the online survey link to providers with an email address listed, first class mailings of survey materials, and reminder emails. The first-class mailings included a cover letter on DECAL stationery signed by the commissioner, the printed survey form, and a postage-paid business reply envelope.

Additionally, an email about the survey with reference copies attached was sent to child care resource and referral (CCR&R) agencies, who were asked to encourage provider participation.

## **Survey Response**

During the survey period, a total of 5,473 respondents (49%) from the unduplicated provider list, which included providers not considered part of the priced child care market, completed at least one survey record or called or emailed to report that they did not provide care. An additional 1,363 records included in the mailing list (12%) were identified as bad addresses due to undeliverable mailing (and location, if available) addresses. Removing bad addresses from the calculation, the effective response rate was 55%.

Of the 3,571 center and school-based providers who reported they currently provide child care, 71% (vs. 60% in 2013) completed the form online; of the 1,225 home-based providers who reported they currently provide child care, 38% (vs. 45% in 2013) completed the form online. Providers who completed the form online and also returned a paper survey are counted only in the first category. This report presents the results for the 4,796 providers who reported they currently provide child care.

## **Key Market Rate Findings**

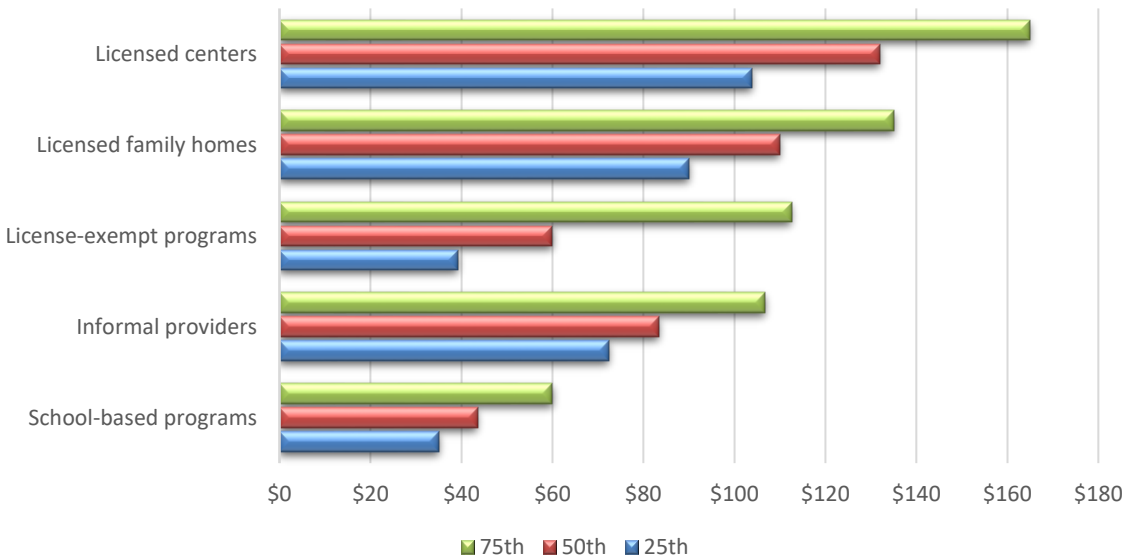
Georgia counties historically have been aggregated into three child care market rate zones based on county population and population growth as well as median income and income growth, median child care rates and geographical location. These zones are useful in understanding rate differences across the state. Zones used for analysis in this report are those that were in place at the time the survey was conducted. In general, Zone 1 includes larger urban counties; Zone 2, counties with suburban areas and/or medium to large cities; and Zone 3, more rural counties with smaller cities and towns.

Analysis of county-level population and economic indicators as well as current market rates suggested some county reassignments to better reflect the markets in those counties, with a recommendation that two counties be moved from Zone 2 to Zone 1 and 11 counties be moved from Zone 2 to Zone 3.

Rate responses were tabulated by state, by market rate zone, by Quality Rated participation and by participation in the state's Childcare and Parent Services child care subsidy program. The 25<sup>th</sup>, 50<sup>th</sup> (median), 75<sup>th</sup>, and 100<sup>th</sup> percentile weekly rates (daily rates for part-time care) and additional statistical measures were calculated for each type of care, age group and category of provider. For example, the 75<sup>th</sup> percentile weekly rate for two-year-old (toddler) care statewide was reported at \$170 per week (vs. \$165 in 2013) for licensed child care learning centers and \$135 per week (vs. \$130 in 2013) for licensed family child care providers.

The following graph shows the rate quartiles (25<sup>th</sup>, 50<sup>th</sup> and 75<sup>th</sup> percentiles) for the average (across age groups) of full-time weekday care for each type of provider, excluding license-exempt center and school-based providers not considered part of the priced child care market.

**Figure 1. Rate Quartiles by Provider License Type**



### Rate Comparisons

Analyses of the 2016-2017 child care market rates included comparisons of rate percentiles over time, by market rate zone, by participation in the state's Quality Rated program, and by participation in the state's child care subsidy program.

- For licensed centers and family child care homes, 75<sup>th</sup> percentile rates have increased over time. Weekly weekday rates for infants and three-year-olds have increased 33% to 39% since 2005 for these providers.
- Historically, and again this year, Georgia child care reimbursement rates have fallen below the 75<sup>th</sup> percentile child care market rates, and the gaps have increased over time.
- Rate comparisons based on quality ratings showed that the 75<sup>th</sup> percentile average weekly center rate for weekday care was 6% (approximately \$10) higher for three-star rated programs than for non-participating or unrated programs and 20% higher than for programs with a zero-star rating; rates generally increased as the number of rating stars increased.
- The subsidy program participation comparison showed that, for licensed centers, average weekly rates for weekday care were 38% higher for non-participating programs than for participating programs. For licensed family homes, the average rate for non-participating homes was 17% higher.

This report presents the results of the 2016-2017 child care market rate survey for the 4,796 providers indicating they currently provided child care and completing the survey.

## 2. Introduction

Bright from the Start: Georgia Department of Early Care and Learning (DECAL) pays all or a portion of the child care expenses incurred by some low-income families and some families caring for children in protective services.

Child care subsidies allow low-income families to participate in a training program, attend school, conduct a job search, or maintain employment. Child care costs represent a substantial work-related expense for low-income families, and many cannot afford the full cost of child care. Child care subsidies are often the only assistance needed for families to support themselves. In Child Protective Services, child care is subsidized to enable children to stay in their homes. Families may also need child care to prevent family breakdown, such as when a family takes in a relative's child to prevent foster care placement.

Child care reimbursement rate scales are based, in part, on local market rates for child care as determined by regular market rate surveys. These surveys are used to obtain rate information as well as other information on the child care setting, other services offered (such as transportation or sick child care), center staffing and teacher education/credentials.

DECAL is responsible for the development of child care resources statewide and contracted with Care Solutions, Inc., in 2013 and again in 2016 to survey the local market costs of child care throughout the state of Georgia with the intention of using the results to assist the state in determining payment rates for subsidized child care.

DECAL sought rate information for various types of child care, care providers, and ages of children, as indicated in Table 1.

Table 1: Categories for Rate Information Collected	
Types of child care	Full-time and part-time care, including weekday child care, before- and/or after-school care, summer care, and after-hours care
Types of child care providers	Licensed child care learning centers (and, previously, group day care homes), school-based child care programs, licensed family child care learning homes, and informal child care providers <sup>1</sup>
Age groups	Infants, toddlers (13-35 months), 3-year-olds, 4- to 5-year-olds, and school-age (age 5 and older)

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<sup>1</sup> DECAL no longer licenses group child care homes as a separate licensing category – these are now licensed as child care learning centers. However, there were a few facilities with a group child care licenses included in the provider lists at the beginning of this study.



Providers were asked to report rates and rate periods (hourly, daily, weekly, monthly, etc.). Rates were determined for infants, toddlers, pre-school age and school-age children. In addition to rate data, the questionnaires included questions about factors that might affect the cost and quality of care. These include special services offered, registration fees, accreditation and participation in the state's Quality Rated program, and teacher/director credentials.

### **3. Background**

Child care in Georgia is provided in a variety of settings. **Regulated** child care includes licensed child care learning centers and licensed family child care learning homes. **Exempt** programs include certain school-based programs, faith-based programs, and others that are legally exempt from state licensing and regulation. **Informal** child care providers are typically a neighbor, friend or relative who takes care of children in the provider's or the child's home. Informal child care providers may participate in the state's subsidized child care program. If so, they have specific requirements they must meet.

#### **Regulated Child Care**

Child care centers (and, previously, group child care homes) are licensed to accept up to a certain number of children based on size and facilities; family child care learning homes are limited to six children.

- A child care learning center is a program operated by a person, society, agency, corporation, institution, or group that receives pay for group care. The child care learning center cares for seven or more children under the age of 18 for less than 24 hours per day.
- A family child care learning home operates in a private residential home less than 24 hours per day. It provides care for three to six children under the age of 18 for pay at any one time, except that two additional children age three or older may be included for two designated one-hour periods per day upon approval.

#### **Exempt Child Care**

Many public schools offer before- and after-school programs as well as summer programs and special needs preschool programs. These programs typically do not offer night, overnight or weekend care. Additionally, some child care programs are exempt from state licensing, including those licensed by the Department of Defense and many faith-based programs.

It is important to note that not all school-based programs and other exempt providers could be contacted for this survey, since the state does not license or register these exempt providers; only those who have requested an exemption or those listed with the state for providing subsidized child care were included in the study.

#### **Informal Child Care**

As is the case for exempt providers, the total in-home child care sector is much larger than the number of informal providers participating in the subsidized child care program; however, there are no statistics available on the total size of the in-home sector. Only those receiving child care subsidies are included in the current study. While this sector defies quantification by its very nature, it most resembles the licensed family child care home from a structural and cost standpoint.

## 4. Survey Method

### Survey Database

Bright from the Start: Georgia Department of Early Care and Learning (DECAL) provided lists from three separate databases – a list from the master licensing database, Kids Online Administrative Licensing Application (KOALA), a list of exempt providers, and a list from Maximus (CAPS) – for a total of 17,794 records. These lists included duplicates, both internally (e.g., multiple rows in the licensing list when a program had changed ownership) and among the lists (e.g., licensed family child care homes also receiving CAPS payments). Duplicates were removed from the merged list in two stages to produce accurate response and return rates.

Duplicates sharing a license number were immediately identified during the process of combining the three lists. The entire KOALA list was imported as the basis of the survey mailing list. Then, rows from the CAPS list that had either no license number or a license number that did not already appear in the Koala list were imported to the combined list. Finally, rows from the Exempt list that had either no license number or a license number that did not already appear in the combined list were imported; if the same license number appeared multiple times in the Exempt list, only one row was added to the combined list. The resulting survey mailing list included 12,699 records (removing 29% of the original records).

Once the state lists were compiled in a database, duplicates that could be identified based on matching criteria (e.g., license number, location address, or provider or facility name) were removed prior to the initial mailing. To remove further duplicates, support staff ordered the combined list by site address and reviewed it visually. Where multiple programs shared a site address, one program was selected for mailing and the others were marked as duplicates. Common situations were resolved using the following logic:

- When a public school had multiple records (e.g., an LSS, CCLC, GAHS, and/or exempt program), the LSS record was used.
- When a CCLC and one or more exempt programs shared a site address, the CCLC record was used.
- When a site with no CCLC had both CAPS and one or more exempt programs, the CAPS record was used.
- When multiple exempt programs shared the same address, one record was picked.

Through this process, 1,424 additional records were identified as duplicates (an additional 8% of the original lists).

In total, 6,519 of the original 17,794 records provided by DECAL (37%) were identified as duplicates and cleaned from the lists to create the survey mailing list.<sup>2</sup>

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<sup>2</sup> Five records were identified as duplicates after the survey mailing and are not included in the number “sent” on the survey response and return report. Seven additional programs/sites were identified during the survey period; records for those programs were added to the survey database and included in the 11,277 “sent.”

Source List	Starting Count	Number Imported to Combined List	Number Included in Survey Mailing List	Number Removed as Duplicate	Percent Removed as Duplicate
KOALA (master)	8,610	8,610	8,252	358	4.16%
CAPS	3,705	353	280	3,425	92.44%
Exempt	5,479	3,736	2,743	2,736	49.94%
Total	17,794	12,699	11,275	6,519	36.64%

Each record was identified as a center/program, public school or family/informal (based on license type or other information in the mailing list) and assigned a survey ID number used to track their response. The center/program category included licensed and license-exempt programs, non-public schools and Head Start/Early Head Start programs as well as afterschool programs.

## Survey Distribution

The survey protocol had multiple stages: first, a postcard announcement was sent to all providers to alert them to the upcoming mailing; additionally, an email announcement was sent to those with listed email addresses. Approximately three weeks later, a link to the online survey was distributed via email and an email reminder was sent one week later. An initial first-class mailing of survey materials (survey form with cover letter and pre-paid business reply envelope) was sent to all providers two weeks after the survey link was distributed via email. These initial distributions were followed by several reminder emails and subsequent mailings of the survey form. Following the initial email distributing the survey link, an email about the survey with reference copies attached was sent to the child care resource and referral (CCR&R) agencies, who were asked to encourage provider participation.

Providers received instructions with each email or mailing inviting them to complete their surveys through an online form or on the paper form provided with mailings.

Of the 3,571 center/school-based providers who reported they currently provide child care, 72% completed or mostly completed the form online (compared to 60% in 2013). A response was considered mostly completed if the provider completed most of the survey, including the questions about charges for child care. Of the 1,225 home-based providers who reported they currently provide child care, 38% completed the form online (compared to 45% in 2013). Providers who completed the form online and also returned a paper survey are counted only in the online category.

The 2016 Georgia child care market rate survey was made available on paper and online in three versions: one for center-based programs, one for public school-based programs, and one for family/informal providers. The center/program survey version included questions about rates for all ages and types of care provided; enrollment figures and child population; CAPS participation and other subsidies/funding; participation in the state's Quality Rated (QR) program; staff counts, pay, and education; and special services. The school survey version was a shorter version of the center/program survey. The family/informal version also included rates, enrollment, CAPS and QR participation, and provider education.

The web-based forms were open from October 31, 2016, to March 14, 2017.<sup>3</sup> Paper survey forms received through March 15 were included in the response rate and dataset for the report.

Center and school-based programs were also offered the option to request a customized Excel spreadsheet to facilitate reporting of survey information by site for owners/directors of multiple sites. Three groups of providers – one private for-profit chain of child care centers and two non-profit out-of-school time programs – requested and received these special Excel spreadsheets.

## **Response Processing**

Throughout the survey period, paper responses were marked as received and then manually entered into the project database after review and cleansing by the project manager. Surveys entered by participants through the online forms were controlled for most errors by coded logic. If participants completed both a paper and an online form, only the online form was counted as a response. If the online form was missing information that was included on the paper form, the online form was updated accordingly.

If participants completed most of the online form (through the required rate questions) and did not return a paper form, the online record was counted as a response and included in the analysis as well as the survey response count.

At the close of the survey period, all responses – whether online or on paper – were queried for anomalies, evaluated, and accepted, corrected, or discarded as necessary to ensure, to the extent possible, a complete and interpretable data set. A few records were eliminated as unusable based on incomplete or un-interpretable records. Additionally, a few providers with exceptionally high rates were contacted directly or websites searched for tuition information, and it was determined that some of the reported rates were actually monthly; the rate data were adjusted accordingly.

As a final step, 15% of responses were pulled for verification calls. Providers were contacted by "mystery shoppers" seeking rate information for two- and four-year-old children. (See Appendix IX for verification results.)

## **Survey Response**

Survey responses and returned mail were tracked by county and region based on the service areas of Georgia's six child care resource and referral agencies and by provider type.

Response rates indicate the number of returned, completed surveys (either on paper or online) received during the survey period based on the number of providers included in the survey distribution.

The overall response rate was 49%, slightly higher than previous years: 48% in 2013, 44% in 2011, 47% in 2009, and 36% in 2007. The return rate, which also includes returned survey packets with undeliverable mailing addresses (and location addresses, if attempted) that were not completed online, was 61%, compared to 57% in 2013. (A detailed response and return report by region and statewide is

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<sup>3</sup> The survey was kept open longer than the planned three months due to a delayed start resulting in the inclusion of the November and December holidays in the survey period.

included in Appendix II.) Multiple email blasts and mailings yielded a strong effective response rate of 55% (compared to 53% in 2013) across all provider types. Response rates were strong for every category except for informal child care providers identified based on the subsidy payment list. This list included numerous bad address records (28% of those sent were returned), indicating that this list was not up-to-date. Additionally, the license-exempt list had a bad address return rate of 18%.

The license-exempt list also presented challenges in that some of the exemptions were for programs that would not be considered part of the priced child care market, such as single purpose after-school and summer lessons or programs for sports, tutoring, dance, theater and music. These programs may have considered the survey as not relevant and been less likely to respond, although some did respond that they did not provide child care. For the purposes of rate analyses, specific types of exemptions not considered to be part of the priced child care market were excluded.

The following table presents a summary of survey responses and returns and rates, including effective response rates, which are calculated by removing bad addresses from the denominator.

	Number sent	Online and paper responses*	Response rate	Bad addresses	Total returns	Return rate	Effective response rate
Licensed centers	3,070	2,122	69%	89	2,211	72%	71%
Licensed family child care homes	1,867	1,095	59%	15	1,110	59%	59%
Combined licensed providers	4,937	3,217	65%	104	3,321	67%	67%
Total centers and school-based programs	9,874	6,434	65%	208	6,642	67%	67%
Total home-based providers	4,404	1,472	33%	714	2,186	50%	40%
Total	11,277	5,473	49%	1,363	6,836	61%	55%

\*Includes "mostly completed" responses

See Appendix II for a detailed response summary report by region and statewide.

A total of 5,639 providers submitted partial or complete responses online or on paper. Of those, 707 indicated they did not currently provide child care, early education, or before/after school care. Half of the "no" responses (356) were from license-exempt programs, and 28% (195) were from informal providers.

Provider License Category	Count
Licensed centers	31
School-based programs	61
License-exempt programs	356
Licensed family child care homes	64
Informal child care providers	195
Total	707

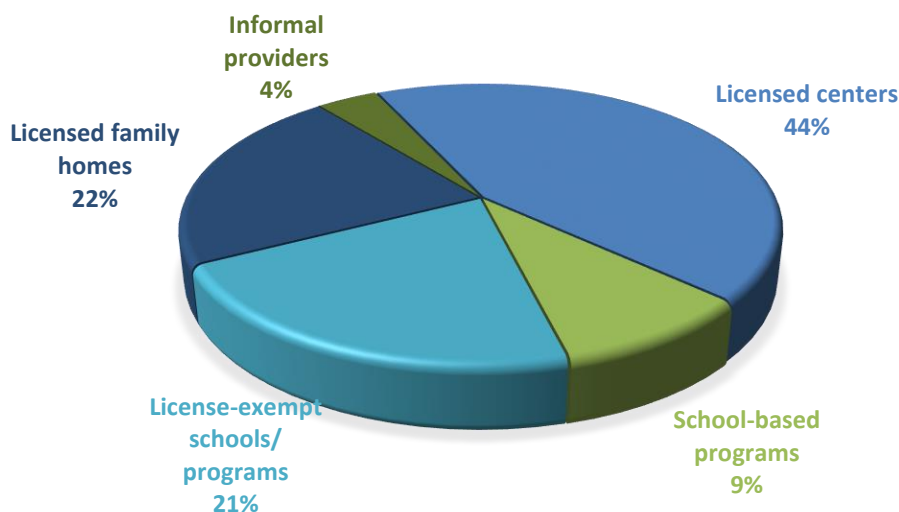
The remaining 4,932 response records indicated current provision of early care and education. However, 136 records did not have responses to enough questions to be considered complete or mostly complete and were therefore excluded from analyses.

A total of 4,796 responses from providers reporting they currently provided early care and education were included in the survey analyses. (This compares to 4,597 responses included in the 2013 survey analyses.) This report presents the results for those 4,796 providers.

## 5. Respondents Currently Providing Child Care

Responding providers represented every county in the state. Nearly three-fourths of the respondents were center and school-based programs, and just over a fourth were home-based child care providers. Figure 2 and Table 5 show respondents by type of provider for the 2016-2017 survey.

**Figure 2. Respondents by License Type (n = 4,976)**



	Number	Percent
Licensed centers	2,096	44%
School-based programs (public)	445	9%
Other centers/programs/schools (license-exempt)	1,030	8%
<i>Total centers/programs/schools</i>	<i>3,571</i>	<i>74%</i>
Licensed family child care homes	1,036	22%
Informal providers	189	4%
<i>Total family/informal</i>	<i>1,225</i>	<i>26%</i>
Total	4,796	100%

More than two-thirds of the providers (68%) had been providing child care for 10 years or more. Informal providers were least likely to have been providing care for 10 years or more and most likely to have been providing care for less than six years.

	Licensed centers	School-based programs	License-exempt programs	Licensed family homes	Informal providers	Total
Less than 1 year	3%	2%	3%	1%	22%	3%
1 to 2 years	6%	2%	7%	4%	22%	6%
3 to 5 years	10%	6%	13%	4%	20%	9%
6 to 9 years	15%	12%	12%	11%	16%	13%
10 years or more	66%	76%	65%	77%	16%	68%
No response	0%	1%	0%	2%	4%	1%
Total	2,096	445	1,030	1,036	189	4,796

Nearly all providers reported they provide full-time care, defined in the survey instrument as care at least three days a week. About two-fifths (41%) reported they provide part-time care (less than three days a week) and more than a third (38%) reported they provide drop-in care.

	Licensed centers	School-based program	License-Exempt Programs	Licensed family homes	Informal Providers	Total
Full-time	96%	94%	80%	98%	93%	93%
Part-time	51%	15%	35%	39%	27%	41%
Drop-in	52%	7%	17%	49%	12%	38%
Total	2,096	445	1,030	1,036	189	4,796

Handwritten notes from some providers who completed the paper form, as well as support calls and emails received during the survey period, indicated that some providers were confused by the use of "full-time care" and "part-time care" to denote days per week rather than hours per day.

Providers were asked to indicate whether they were open Monday through Friday, Saturday, Sunday, and/or on work or school holidays.

	Licensed Centers	School-Based program	License-Exempt Programs	Licensed family homes	Informal Providers	Total
Monday-Friday	100%	99%	99%	99%	96%	99%
Saturday	2%	0%	5%	7%	37%	5%
Sunday	1%	0%	2%	5%	28%	3%
Work or school holidays	24%	0%	11%	32%	60%	22%
Total	2,096	445	1,030	1,036	189	4,796

Providers were asked if they would provide after-hours care (outside of usual opening and closing times). Licensed centers (14%), public school-based programs (25%), and exempt/other programs (12%) were less likely to report they would do so, compared to licensed family providers (46%) and informal providers (76%).

## Center and School-Based Program Characteristics

Most of the center and exempt programs were single-site entities.

Table 9. Type of Site for Licensed Centers and License-Exempt Programs		
	Licensed centers	License-exempt programs
Single site	72%	69%
Chain with multiple sites	27%	22%
No response	1%	9%
Total	2,092	1,030

More than a third of the center/school-based program respondents (36%) identified their programs as “a privately owned and operated for-profit child care center, program or preschool” (private for-profit), as indicated in the following chart.

Table 10. Reported Program Type for Licensed Centers and License-Exempt Programs	
Privately owned and operated for-profit center/program/preschool	36%
Public school-based before- and/or after-school program	20%
Faith-based center/program/preschool	20%
Private non-profit center/program/preschool	12%
Head Start/Early Head Start center only	4%
Community or parks and recreation	3%
Company-sponsored center serving employees only	1%
College/university-based center/program/preschool	1%
Military-base center/program/preschool	0%

## Family and Informal Provider Characteristics

Family and informal child providers were asked to indicate a single care location. Nearly all reported providing care for children in the provider’s own home (98%). Four percent of the informal providers and no licensed family providers reported providing care at the child’s home. Three percent of the informal providers and one percent of licensed family providers reported providing care at another location. Other locations reported included a specific other address or a location on or near the provider’s home property (nearby mobile home, behind house, building in backyard).

Family/informal providers were also asked about their relationship to the children in their care. Most reported providing care for at least some children not related to themselves, but many also care for their own children, their grandchildren, or other related children.



	Licensed family homes	Informal providers	Total
Own children	17%	10%	16%
Own grandchildren	42%	69%	46%
Related children	36%	29%	35%
Unrelated children	91%	31%	82%
Total	1,036	189	1,225

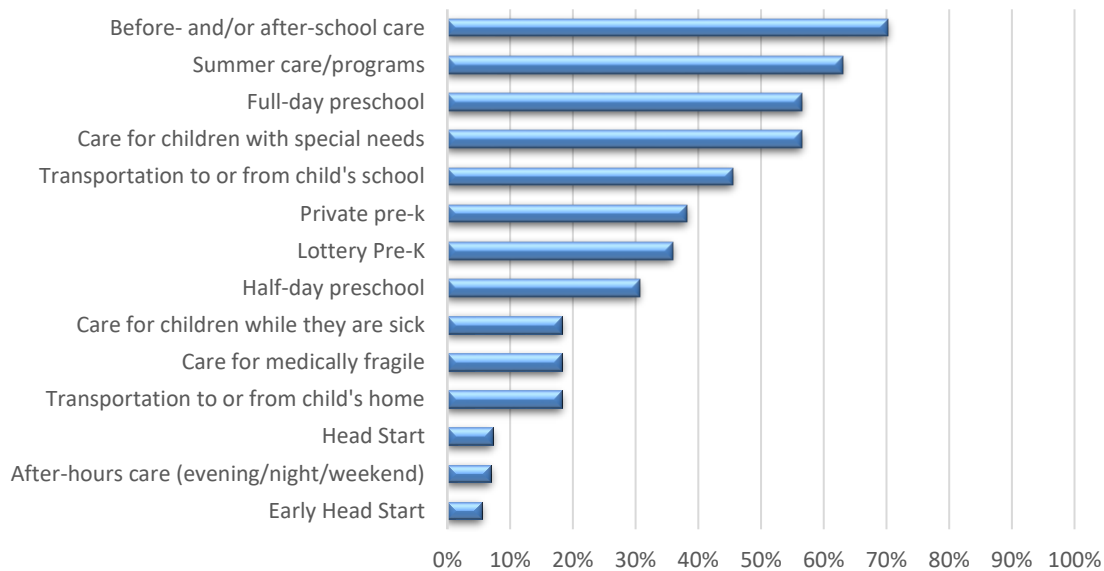
### Technology Access

Nearly all family and informal providers reported having Internet access at home (91%) or at another location (8%) as well as an email address for parents to use to contact the provider (92%).

### Programs/Services

Providers were asked to indicate whether they provided specifically listed programs or services. Most center/school-based programs indicated they provide before- and/or after-school care, summer care, full-day preschool, and care for children with special needs (not specifically defined). Just over a third (36%) indicated they provided Georgia's lottery-funded Pre-K program.

**Figure 3. Center-Based Programs: Reported Programs and Services (n=3,571)**

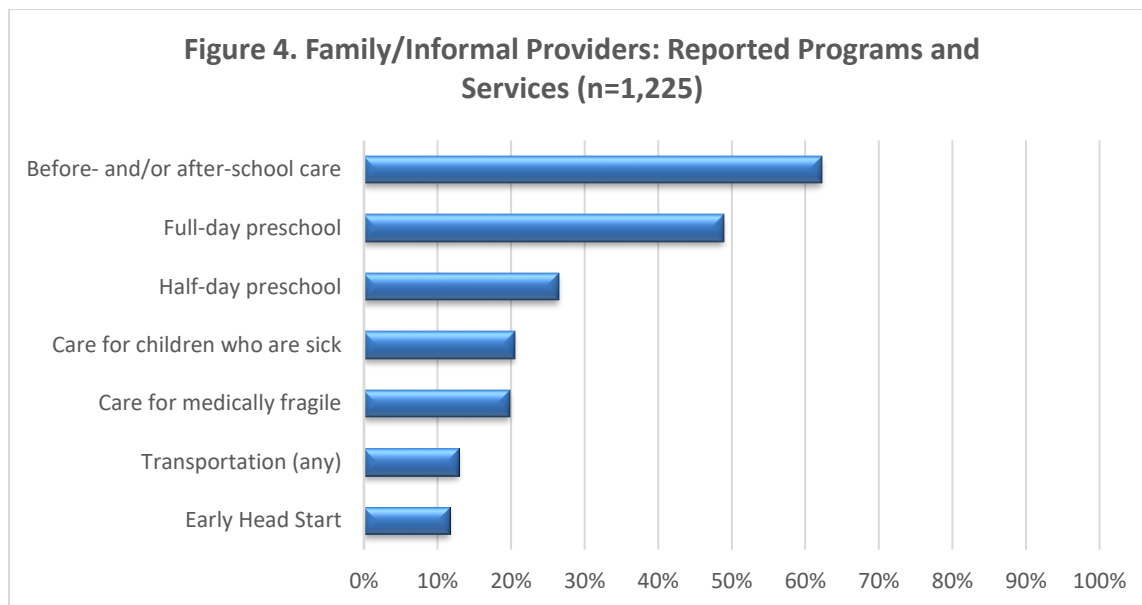


Centers and school-based programs were asked about language instruction in a child's home language for children with a home language other than English. Home language instruction for children among center and school-based programs with at least one child whose home language is not English (n=1,809) included:

- 31% reported providing instruction in Spanish
- 8% reported providing instruction in another language

Family and informal providers are not eligible to offer Georgia’s Pre-K program or Head Start services but were asked about many of the same services. Informal providers were most likely to report providing care for children while they are sick (49% vs. 18% for center/school-based programs and 15% for licensed family child care homes). Handwritten notes on some paper survey forms indicated sick-care policies were based on specifics of the illness or care required (e.g., no fever, not contagious).

Public school-based programs were most likely to indicate they provide care for medically fragile (not specifically defined) children (39%), compared to other types of providers, which ranged from 10% to 20%. Public school-based programs were also most likely to indicate they provide transportation to and from school (68%), followed by licensed centers (53%). Nearly half of informal providers (49%) indicated they provide any transportation, compared to only 15% of licensed family child care homes.



## 6. Market Rate Findings

Most of the responding providers indicated they charge for the care they provide, with licensed centers and homes most likely to indicate they charge for child care.

	Licensed Centers	School-Based Programs	License-Exempt Programs	Licensed Family Homes	Informal Providers	Total
Yes	84%	40%	76%	93%	59%	79%
No	16%	60%	24%	7%	41%	21%
Total	2,096	445	1,030	1,036	189	4,796

Licensed centers that reported not charging parents for the care they provide included Early Head Start and Head Start programs, faith-based programs, for-profit programs, and non-profit programs.

Providers who reported charging parents for care were asked to provide their weekly rates for full-time weekday care, defined as care provided at least three days a week between 6 a.m. and 6 p.m.; full-time weeknight care, defined as at least three days a week between 6 p.m. and 6 a.m.; and part-time care, defined as less than three days a week.

Number of Age Group Rates Reported	Licensed Centers	School-Based Programs	License-Exempt Programs	Licensed Family Homes	Informal Providers	Total
No age-group rates	10%	76%	40%	4%	11%	17%
1 age group rate	2%	18%	8%	2%	19%	4%
2 age group rates	2%	4%	6%	3%	14%	4%
3 age group rates	3%	1%	12%	6%	10%	6%
4 age group rates	8%	1%	15%	9%	3%	9%
5 age group rates	19%	-	12%	17%	5%	16%
6 age group rates	56%	-	6%	60%	39%	44%
Percent reporting any rates	90%	24%	60%	96%	89%	83%
Total	1,767	180	702	968	111	3,086

Reported weekday rates were indicated as half-day rates for 276 of 2,077 centers/schools/exempts reporting weekday rates (30 licensed centers, 15 school-based programs and 231 license-exempt programs).

Among providers who reported charging parents for care, 62% reported rates for before- and/or after-school care; 35% reported rates for part-time care.

	Licensed Centers	School-Based Programs	License-Exempt Programs	Licensed Family Homes	Informal Providers	Total
Before- and/or after-school care	74%	87%	37%	54%	68%	62%
Summer care	69%	6%	26%	45%	52%	63%
Part-time care	41%	8%	14%	46%	32%	35%
Night/overnight care	5%	0%	3%	17%	34%	9%
Weekend care	2%	0%	2%	12%	31%	5%
Total	1,767	180	702	968	111	3,086

Rates reported as half-day rates, hourly rates and drop-in care rates (daily or hourly) are not included in weekly rate statistics, regardless of the type of care. Of 4,796 providers, only 7% reported any hourly rates. Among 723 providers reporting drop-in care rates, 90% reported those rates as daily.

- Daily drop-in rates ranged from \$5 to \$120 per day, with a median of \$35.00 per day.
- Hourly drop-in rates ranged from \$2 to \$25 per hour, with a median of \$9.00 per hour.

Providers were categorized based on their license type. Providers with no license number were included in the exempt category. Exempt providers were identified as part of the priced child care market based on specific exemption categories. The categories were identified by DECAL, and many providers had multiple exemptions. If a provider had one or more exemptions considered to be part of the priced market, that provider was included in the rate statistics, even if that provider also had one or more exemptions that were not considered to be part of the priced market. A total of 782 of the 1,030 license-exempt programs were considered to be part of the priced market.

Exemption categories not considered part of the priced child care market included:

- Private, non-public education programs with established curriculum for children age five and older that operate during the school term for customary school day (not exceeding customary school day)
- Mother's morning out/parents' night out
- Short-term educational or recreational activities or classes for children in which the supervision and care of the children are incidental, including but not limited to music lessons, dance classes, swim lessons, etc. (limited to six hours per week)
- Any short-term child care service provided by an establishment, such as a religious facility, health club, retail setting (limited to 4 hours per day, 10 hours per week; parents on premises)
- Program operated after the customary school day for children five years or older that are strictly instructional and skill-based in a single talent or ability such as art, cheerleading, dance, drama, gymnastics, martial arts, etc. (during the school year; no homework assistance)
- Tutoring (limited to six hours per week)
- Any program for school-aged children operated by or in affiliation with a national membership non-profit organization such as Boys and Girls Clubs of America (not YMCA)
- Any program providing care for children for no pay

In Georgia, reported market rate statistics have been site-based rather than slot-based (weighted based on provider capacity or enrollment). For 2016-2017, in response to federal guidance, analyses included both site-based and slot-based rate calculations. Statistics included in this report are site-based, and slot-based rate information is included in Appendix VI.

## **Market Rate Zones**

Rather than calculate 159 discrete rate scales based on a small number of providers in each county, Georgia counties have been grouped into child care market rate zones. These market rate zones were initially established in the 1990s and have been adjusted as needed based on reported child care rates and other data. The zones were developed to allow the state to take into account significantly higher child care rates in the metropolitan Atlanta and other metropolitan markets, recognizing the impact higher rates in these counties may have on rates in neighboring, non-metro counties.

Currently, Georgia counties are grouped into three child care market rate zones, with 14 counties in Zone 1, 46 in Zone 2, and 99 in Zone 3.

- Zone 1 – includes counties in the greater metro Atlanta area and, beginning in 2005, Camden County, which is affected by the adjacent Jacksonville, Florida market
- Zone 2 – includes counties with other urban and suburban areas
- Zone 3 – includes counties with rural areas, smaller cities and towns

The zone analysis included:

1. An examination of correlations among county population and economic indicators as well as median child care market rates (site-based and slot-based for average weekly weekday care rates);
2. Cluster analyses (fixed three-group) using indicators most highly correlated with median market rates (three-year population change and median household income); and
3. An examination of the county median rates, population and economic indicators, cluster analysis group assignments, current zone assignment, geographic proximity to metropolitan areas as well as market rate zones, and the number of responses on which county median rates were based.

Based on this analysis, recommendations were to move two counties – Barrow and Oconee – from Zone 2 to Zone 1 and to move 11 counties from Zone 2 to Zone 3: Baldwin, Floyd, Gordon, Hart, Liberty, Madison, McDuffie, Meriwether, Murray, Pulaski and Troup.

Appendix IV is a map of Georgia counties by child care market rate zones as assigned at the time of the survey.

## **Market Rate Data**

Child care rate responses were tabulated by state and by market rate zone.

The 25<sup>th</sup>, 50<sup>th</sup> (median), 75<sup>th</sup> and 100<sup>th</sup> (maximum) percentile weekly or daily rates and additional statistics were calculated for each type of care, age group and category of provider. For example, the 75<sup>th</sup> percentile weekly rate for two-year-old (toddler) care statewide was reported at \$170 per week (vs. \$165 in 2013) for licensed child care learning centers and \$135 per week (vs. \$130 in 2013) for licensed family child care providers (site-based rates).

School-based programs typically provide only before- and/or after-school care for school-age children (or Georgia's Pre-K program or early intervention preschools at no charge). The rates for responding school-based programs that do provide weekday child care are reflected in some tables and charts, but these counts are too small for generalization.

The following sections present the market rate findings, beginning with a historical rate comparison.

## **Historical Rate Comparison**

Market rate studies are conducted regularly to determine local market rates. Care Solutions completed the Georgia child care market rate studies prior to 2005 as well as the 2013 and the 2016-2017 studies. The 2005 through 2011 market rate studies were conducted by the School of Social Work at Georgia State

University and the A.L. Burruss Institute of Public Service and Research at Kennesaw State University. Data in this section are drawn from reports by Care Solutions and by Georgia State University and Kennesaw State University, as applicable.

Through 2007, all providers received paper survey forms. Beginning in 2009, licensed child care centers with email addresses were encouraged first to report online; centers that did not complete the online survey were included in later mailings. The same two-step process was used in 2011. In 2013 and in 2016, all providers on DECAL-provided mailing lists (after removal of duplicates) were offered the opportunity to complete a survey online.

Over the years, paper surveys (and online screens, as available) were developed for two main categories of providers: centers, group homes, and other programs (including schools); and family and informal child care providers, with changes to the survey greater in some years than in others. In 2013 and 2016, survey forms were available in English and in Spanish. In 2016, a shorter version of the center survey form was created for public school-based child care programs.

The following comparison of site-based rate data across multiple years of market rate surveys can be helpful in identifying trends but must be read with caution due to shifts in calculations or categorizations over time. For instance, informal providers have been added to or excluded from the set of survey participants; group homes, schools, and exempt programs have been separated from center-based programs in rate calculations; the age ranges included in each survey instrument have varied; and the project teams have changed.

Perhaps for these reasons, in addition to economic factors, the rates of increase at the 75th percentile for weekday care, for example, for infants, three-year-olds, and before- and after-school care to school-age children have shown inconsistent movement over time for providers statewide. Although rates in all categories have increased since 2001, both the overall percentages of increase and the increases between consecutive surveys are vastly different among provider types and ages. Center rates have increased from survey to survey; rates for group homes, family child care homes, and informal providers have increased or stayed the same, except the three-year-old rate for informal providers declined from the 2003 to 2005 surveys.

Licensed centers and family child care homes have had fairly steady increases in rates over time. Weekly weekday 75<sup>th</sup> percentile child care rates for infants and three-year-olds have increased 33% to 39% since 2005 for these providers.

Informal providers have had the highest percentage increases since 2005 – 54% for three-year-old care and 67% for infant care. Likely due to the smaller number of group homes and informal providers, those categories have shown the greatest inconsistencies over time.

Table 15 shows the 75th percentile weekday rates (weekly rates) for care for three age groups/care types and four provider types.

Table 15: 75 <sup>th</sup> Percentile Weekly Weekday Care Rates by Year									
Age/Care Type and Provider Type	75th Percentile Weekday (Weekly) Rates								Percent Increase Since 2005
	2001	2003	2005	2007	2009	2011	2013	2016-17	
<b><i>Infant care</i></b>									
Center-based providers	\$110.00	\$125.00	\$135.00	\$145.00	\$155.00	\$160.00	\$172.75	\$180.00	33%
Group homes	-	\$90.00	\$90.00	\$100.00	\$100.00	\$105.00	\$120.00	-	
Family child care homes	\$95.00	\$100.00	\$110.00	\$125.00	\$125.00	\$125.00	\$135.00	\$148.75	35%
Informal providers <sup>1</sup>	-	\$75.00	\$75.00	\$95.00	\$100.00	\$120.00	\$125.00	\$125.00	67%
<b><i>Three-year-old care<sup>2</sup></i></b>									
Center-based providers	\$95.00	\$110.00	\$115.00	\$125.00	\$137.00	\$143.75	\$150.00	\$160.00	39%
Group homes	-	\$85.00	\$82.25	\$86.25	\$100.00	\$100.00	\$100.00	-	
Family child care homes	\$90.00	\$90.00	\$100.00	\$100.00	\$110.00	\$115.00	\$125.00	\$135.00	35%
Informal providers	-	\$79.00	\$65.00	\$74.75	\$90.00	\$95.00	\$100.00	\$100.00	54%
<b><i>Before- and after-school care (school age)<sup>3</sup></i></b>									
Center-based providers	\$50.00	\$55.00	\$60.00	\$70.00	\$75.00	\$75.00	\$76.00	\$85.00	42%
Group homes	-	\$30.00	\$45.00	\$53.75	\$55.00	\$60.00	\$65.00	-	
Family child care homes	\$45.00	\$45.00	\$50.00	\$60.00	\$60.00	\$65.00	\$65.00	\$75.00	50%
Informal providers	-	\$42.00	\$50.00	\$55.00	\$60.00	\$65.00	\$70.00	\$80.00	60%

Table notes:

1. In 2001, informal providers were not surveyed, and group homes were included with center-based providers. For 2016-2017, group homes were included with center-based providers as the state no longer licenses group homes separately; there were five respondents that still had a GDHC license on the survey provider listing.
2. In 2007, the survey included a single age group for children 3-5; that rate is shown for three-year-olds above.
3. The collection of before- and after-school care has shifted from collecting a single rate for after-school care only to a combined rate for before- and after-school care to a range of rates for each type (before, after, and before-and-after).

## Market Rate Statistics

The next set of tables presents statewide market rate results for each type of provider, category of care and child age group. This is followed by comparisons of full-time weekday rates for licensed centers and family homes based on participation in the state's Quality Rated program and participation in the state's subsidy program, Childcare and Adult Program Services (CAPS), as well as a comparison of current assistance rates to current market rate percentiles by zone.

Detailed statistics for rates by zone and site vs. slot-based rates are included in Appendices V and VI.

## Child Care Learning Centers

Table 16. Licensed Child Care Learning Center Rate Statistics

	Provider (site) Responses		Mean	Percentiles		
	Response	No response		25th	50th	75th
Weekly Weekday Care (weekly rate)						
Infants	1,341	755	\$160.14	\$115.00	\$145.00	\$180.00
One-year-olds	1,447	649	\$155.02	\$110.00	\$140.00	\$175.00
Two-year-olds	1,478	618	\$149.65	\$105.75	\$135.00	\$170.00
Three-year-olds	1,544	552	\$143.27	\$100.00	\$130.00	\$160.35
Four-year-olds	1,454	642	\$137.25	\$95.00	\$124.00	\$155.00
Five year-olds not in school	1,134	962	\$127.79	\$90.00	\$115.00	\$140.00
Weekly Night/Overnight Care (weekly rate)						
Infants	79	2,017	\$188.57	\$100.00	\$125.00	\$165.00
One-year-olds	80	2,016	\$177.48	\$95.00	\$115.00	\$157.50
Two-year-olds	81	2,015	\$169.21	\$94.50	\$105.00	\$147.50
Three-year-olds	81	2,015	\$162.00	\$88.00	\$100.00	\$137.00
Four-year-olds	81	2,015	\$158.88	\$85.00	\$100.00	\$130.00
Five year-olds not in school	77	2,019	\$156.74	\$84.00	\$100.00	\$129.50
5-12-year-olds	93	2,003	\$144.48	\$75.00	\$90.00	\$120.00
Weekend Care (weekend/two-day rate)						
Infants	27	2,069	\$95.59	\$65.00	\$90.00	\$120.00
One-year-olds	28	2,068	\$90.50	\$61.25	\$87.50	\$117.50
Two-year-olds	30	2,066	\$85.27	\$63.75	\$85.00	\$100.00
Three-year-olds	30	2,066	\$85.13	\$65.00	\$80.00	\$100.00
Four-year-olds	30	2,066	\$84.30	\$65.00	\$80.00	\$100.00
Five year-olds not in school	31	2,065	\$79.74	\$60.00	\$75.00	\$100.00
5-12-year-olds	31	2,065	\$82.55	\$60.00	\$80.00	\$100.00
Part-Time Care (less than three days a week – daily rate)						
Infants	592	1,504	\$42.33	\$30.00	\$40.00	\$50.00
One-year-olds	662	1,434	\$41.59	\$30.00	\$40.00	\$47.13
Two-year-olds	677	1,419	\$40.92	\$30.00	\$38.00	\$45.00
Three-year-olds	701	1,395	\$39.58	\$29.00	\$35.00	\$45.00
Four-year-olds	664	1,432	\$38.44	\$28.00	\$35.00	\$45.00
Five year-olds not in school	601	1,495	\$37.46	\$26.00	\$35.00	\$45.00
Out-of-School Time Care (weekly rate)						
Before and after school	1,099	997	\$75.44	\$60.00	\$70.00	\$85.00
Before school	846	1,250	\$49.96	\$35.00	\$46.80	\$65.00
After school	1,109	987	\$63.89	\$50.00	\$65.00	\$75.00
Summer	1,228	868	\$124.83	\$95.00	\$115.00	\$140.00



## Public School-Based Programs

Table 17. Public School-Based Program Rate Statistics

	Provider (site) Responses		Mean	Percentiles		
	Response	No response		25th	50th	75th
Weekly Weekday Care (weekly rate)						
Infants	1	444	\$295.00	\$295.00	\$295.00	\$295.00
One-year-olds	1	444	\$295.00	\$295.00	\$295.00	\$295.00
Two-year-olds	1	444	\$271.00	\$271.00	\$271.00	\$271.00
Three-year-olds	8	437	\$101.99	\$61.05	\$80.00	\$109.88
Four-year-olds	29	416	\$42.16	\$30.00	\$40.00	\$50.00
Five year-olds not in school	5	440	\$41.00	\$35.00	\$40.00	\$47.50
Part-Time Care (less than three days a week – daily rate)						
Infants	0	445				
One-year-olds	0	445				
Two-year-olds	0	445				
Three-year-olds	1	444	\$5.00	\$5.00	\$5.00	\$5.00
Four-year-olds	15	430	\$8.87	\$6.00	\$9.00	\$10.00
Five year-olds not in school	4	441	\$8.50	\$6.50	\$9.00	\$10.00
Out-of-School Time Care (weekly rate)						
Before and after school	48	397	\$61.20	\$35.00	\$57.50	\$91.00
Before school	43	402	\$27.39	\$18.00	\$20.00	\$46.80
After school	145	300	\$44.04	\$30.00	\$40.00	\$50.00
Summer	11	434	\$111.82	\$60.00	\$90.00	\$195.00

## License-Exempt/Other Providers in the Priced Market (includes faith-based and non-profit programs)

Table 18. License-Exempt/Other Program Rate Statistics

	Provider (site) Responses		Mean	Percentiles		
	Response	No response		25th	50th	75th
Weekly Weekday Care (weekly rate)						
Infants	53	729	\$90.57	\$33.72	\$95.00	\$140.00
One-year-olds	101	681	\$70.97	\$31.98	\$39.53	\$105.00
Two-year-olds	138	644	\$69.22	\$37.21	\$46.51	\$95.00
Three-year-olds	156	626	\$77.84	\$42.15	\$58.14	\$104.33
Four-year-olds	176	606	\$84.98	\$44.19	\$60.47	\$109.65
Five year-olds not in school	129	653	\$101.70	\$54.07	\$85.00	\$115.00
Weekly Night/Overnight Care (weekly rate)						
Infants	3	779	\$250.00	\$110.00	\$165.00	
One-year-olds	4	778	\$195.00	\$83.75	\$127.50	\$373.75
Two-year-olds	4	778	\$188.75	\$83.75	\$127.50	\$355.00
Three-year-olds	6	776	\$200.83	\$97.50	\$160.00	\$316.25
Four-year-olds	6	776	\$200.83	\$97.50	\$160.00	\$316.25
Five year-olds not in school	7	775	\$155.71	\$85.00	\$105.00	\$185.00
5-12-year-olds	23	759	\$90.61	\$40.00	\$75.00	\$105.00
Weekend Care (weekend/two-day rate)						
Infants	4	778	\$96.25	\$61.25	\$97.50	\$130.00
One-year-olds	7	775	\$76.39	\$32.56	\$65.00	\$130.00
Two-year-olds	7	775	\$72.67	\$32.56	\$61.16	\$130.00
Three-year-olds	7	775	\$119.45	\$60.00	\$65.00	\$130.00
Four-year-olds	7	775	\$119.69	\$60.00	\$65.00	\$130.00
Five year-olds not in school	8	774	\$110.98	\$52.50	\$63.93	\$127.50
5-12-year-olds	15	767	\$83.80	\$20.00	\$50.00	\$120.00
Part-Time Care (less than three days a week – daily rate)						
Infants	33	749	\$27.05	\$17.25	\$24.00	\$30.00
One-year-olds	66	716	\$25.04	\$16.81	\$20.64	\$30.00
Two-year-olds	72	710	\$28.54	\$17.63	\$23.25	\$35.00
Three-year-olds	56	726	\$28.67	\$17.13	\$25.00	\$35.00
Four-year-olds	57	725	\$26.72	\$13.13	\$20.65	\$35.00
Five year-olds not in school	46	736	\$27.50	\$14.75	\$25.00	\$35.00
Out-of-School Time Care (weekly rate)						
Before and after school	43	739	\$61.88	\$40.00	\$60.00	\$72.00
Before school	40	742	\$33.50	\$20.20	\$25.00	\$48.75
After school	243	539	\$49.49	\$35.00	\$40.00	\$55.00
Summer	181	601	\$107.42	\$60.00	\$100.00	\$131.00

## Licensed Family Child Care Learning Homes

Table 19. Licensed Family Child Care Learning Home Rate Statistics

	Provider (site) Responses		Mean	Percentiles		
	Response	No response		25th	50th	75th
Weekly Weekday Care (weekly rate)						
Infants	852	184	\$124.11	\$95.00	\$120.00	\$148.75
One-year-olds	877	159	\$119.70	\$90.00	\$115.00	\$140.00
Two-year-olds	898	138	\$117.39	\$90.00	\$110.00	\$135.00
Three-year-olds	861	175	\$114.76	\$90.00	\$100.00	\$135.00
Four-year-olds	774	262	\$112.46	\$85.00	\$100.00	\$130.00
Five year-olds not in school	623	413	\$106.85	\$80.00	\$100.00	\$125.00
Weekly Night/Overnight Care (weekly rate)						
Infants	145	891	\$196.50	\$105.00	\$150.00	\$250.00
One-year-olds	148	888	\$182.17	\$100.00	\$145.00	\$218.75
Two-year-olds	152	884	\$176.13	\$100.00	\$132.50	\$200.00
Three-year-olds	149	887	\$168.50	\$95.00	\$125.00	\$200.00
Four-year-olds	148	888	\$162.81	\$95.00	\$125.00	\$193.75
Five year-olds not in school	141	895	\$160.96	\$92.50	\$125.00	\$187.50
5-12-year-olds	143	893	\$153.57	\$85.00	\$125.00	\$175.00
Weekend Care (weekend/two-day rate)						
Infants	107	929	\$89.90	\$65.00	\$80.00	\$120.00
One-year-olds	105	931	\$86.90	\$60.00	\$80.00	\$100.00
Two-year-olds	107	929	\$85.37	\$60.00	\$80.00	\$100.00
Three-year-olds	104	932	\$84.04	\$60.00	\$80.00	\$100.00
Four-year-olds	104	932	\$83.65	\$60.00	\$80.00	\$100.00
Five year-olds not in school	99	937	\$83.13	\$60.00	\$80.00	\$100.00
5-12-year-olds	100	936	\$81.65	\$60.00	\$77.50	\$100.00
Part-Time Care (less than three days a week – daily rate)						
Infants	404	632	\$34.05	\$25.00	\$30.00	\$40.00
One-year-olds	417	619	\$33.13	\$25.00	\$30.00	\$40.00
Two-year-olds	424	612	\$32.51	\$25.00	\$30.00	\$40.00
Three-year-olds	413	623	\$31.68	\$25.00	\$30.00	\$40.00
Four-year-olds	397	639	\$31.22	\$25.00	\$30.00	\$35.00
Five year-olds not in school	353	683	\$30.54	\$24.00	\$30.00	\$35.00
Out-of-School Time Care (weekly rate)						
Before and after school	411	625	\$66.45	\$50.00	\$65.00	\$75.00
Before school	301	735	\$51.15	\$35.00	\$45.00	\$60.00
After school	426	610	\$51.44	\$35.00	\$50.00	\$60.00
Summer	435	601	\$101.73	\$80.00	\$95.00	\$115.00

## Informal Child Care Providers

Table 20. Informal Child Care Provider Rate Statistics

	Provider (site) Responses		Mean	Percentiles		
	Response	No response		25th	50th	75th
Weekly Weekday Care (weekly rate)						
Infants	68	121	\$114.85	\$90.00	\$100.00	\$125.00
One-year-olds	71	118	\$106.34	\$75.00	\$95.00	\$125.00
Two-year-olds	71	118	\$100.56	\$75.00	\$85.00	\$110.00
Three-year-olds	60	129	\$95.93	\$75.00	\$85.00	\$100.00
Four-year-olds	58	131	\$91.62	\$65.00	\$80.00	\$100.00
Five year-olds not in school	56	133	\$88.14	\$65.00	\$75.00	\$100.00
Weekly Night/Overnight Care (weekly rate)						
Infants	21	168	\$181.90	\$80.00	\$100.00	\$167.50
One-year-olds	23	166	\$171.30	\$70.00	\$85.00	\$160.00
Two-year-olds	25	164	\$166.00	\$70.00	\$95.00	\$132.50
Three-year-olds	23	166	\$122.61	\$65.00	\$75.00	\$100.00
Four-year-olds	21	168	\$125.95	\$60.00	\$75.00	\$110.00
Five year-olds not in school	19	170	\$125.00	\$60.00	\$75.00	\$115.00
5-12-year-olds	34	155	\$109.94	\$50.00	\$75.00	\$100.00
Weekend Care (weekend/two-day rate)						
Infants	21	168	\$81.19	\$50.00	\$75.00	\$100.00
One-year-olds	22	167	\$75.00	\$50.00	\$67.50	\$100.00
Two-year-olds	24	165	\$74.96	\$50.00	\$64.50	\$100.00
Three-year-olds	22	167	\$68.86	\$50.00	\$52.50	\$100.00
Four-year-olds	20	169	\$68.75	\$50.00	\$52.50	\$93.75
Five year-olds not in school	20	169	\$67.25	\$46.25	\$50.00	\$86.25
5-12-year-olds	31	158	\$64.97	\$45.00	\$50.00	\$75.00
Part-Time Care (less than three days a week – daily rate)						
Infants	31	158	\$33.15	\$20.00	\$25.00	\$40.00
One-year-olds	30	159	\$28.83	\$20.00	\$25.00	\$35.00
Two-year-olds	28	161	\$28.29	\$20.00	\$25.00	\$33.75
Three-year-olds	26	163	\$26.62	\$20.00	\$25.00	\$30.00
Four-year-olds	28	161	\$25.25	\$15.50	\$25.00	\$30.00
Five year-olds not in school	30	159	\$27.90	\$19.25	\$25.00	\$30.00
Out-of-School Time Care (weekly rate)						
Before and after school	65	124	\$72.98	\$50.00	\$60.00	\$80.00
Before school	41	148	\$56.67	\$26.25	\$45.00	\$65.00
After school	51	138	\$59.47	\$35.00	\$45.00	\$60.00
Summer	58	131	\$106.38	\$73.75	\$80.00	\$112.50

## Rates by Quality Rated Participation

Tables 21 and 22 present rates by participation and ratings assigned by the state's Quality Rated (QR) program. For licensed centers, the 75<sup>th</sup> percentile average weekly rate for weekday care was 6% (approximately \$10) higher for three-star rated programs than for non-participating and unrated programs. The 75<sup>th</sup> percentile rate was 20% (approximately \$30) higher for three-star programs compared to rated programs receiving no stars.

The findings for licensed family homes were similar, with the 75<sup>th</sup> percentile weekly rate for weekday care 19% higher for three-star rated homes than for non-participating and unrated homes and 14% higher compared to rated programs receiving no stars.

For both licensed centers and licensed homes, weekly rates generally increased as the number of rating stars increased. Rate statistic by quality rating are presented in Tables 21 and 22.

Table 21. Center Rate Statistics by Quality Rating Based on March 2017 Administrative Data <sup>1</sup>						
Licensed Child Care Learning Centers	Responses	Non-respondents	Mean	Percentiles		
				25th	50th	75th
Not participating in QR or not rated						
<i>Infants</i>	839	511	\$164.29	\$115.00	\$145.00	\$185.00
<i>One-year-olds</i>	912	438	\$159.08	\$110.00	\$140.00	\$184.50
<i>Two-year-olds</i>	935	415	\$153.24	\$105.00	\$135.00	\$175.00
<i>Three-year-olds</i>	993	357	\$146.74	\$100.00	\$130.00	\$167.72
<i>Four-year-olds</i>	964	386	\$140.98	\$95.00	\$125.00	\$162.09
<i>Five year-olds not in school</i>	755	595	\$133.00	\$90.00	\$115.00	\$140.00
<i>Average weekly weekday rate</i>	1,016	334	\$149.11	\$100.83	\$132.00	\$168.25
Participating in QR, zero-star rating						
<i>Infants</i>	50	18	\$139.68	\$100.75	\$139.50	\$160.50
<i>One-year-olds</i>	51	17	\$144.98	\$100.00	\$136.00	\$155.00
<i>Two-year-olds</i>	50	18	\$126.38	\$99.00	\$129.50	\$146.25
<i>Three-year-olds</i>	50	18	\$120.04	\$95.00	\$122.00	\$137.25
<i>Four-year-olds</i>	47	21	\$115.53	\$95.00	\$115.00	\$130.00
<i>Five year-olds not in school</i>	41	27	\$109.46	\$87.50	\$110.00	\$130.00
<i>Average weekly weekday rate</i>	51	17	\$129.46	\$99.67	\$127.33	\$148.33
Participating in QR, one-star rating						
<i>Infants</i>	206	70	\$150.66	\$115.00	\$142.00	\$174.25
<i>One-year-olds</i>	218	58	\$144.02	\$108.75	\$137.00	\$165.50
<i>Two-year-olds</i>	220	56	\$140.39	\$107.00	\$135.00	\$160.00
<i>Three-year-olds</i>	223	53	\$133.57	\$102.00	\$125.00	\$152.00
<i>Four-year-olds</i>	203	73	\$127.91	\$100.00	\$120.00	\$145.00
<i>Five year-olds not in school</i>	161	115	\$120.02	\$95.00	\$115.00	\$135.00
<i>Average weekly weekday rate</i>	223	53	\$137.09	\$106.33	\$128.50	\$156.67
Participating in QR, two-star rating						

<i>Infants</i>	211	115	\$156.01	\$120.00	\$150.00	\$180.00
<i>One-year-olds</i>	224	102	\$148.27	\$110.60	\$140.00	\$170.00
<i>Two-year-olds</i>	228	98	\$145.71	\$111.00	\$140.00	\$167.50
<i>Three-year-olds</i>	233	93	\$139.64	\$108.00	\$131.40	\$160.00
<i>Four-year-olds</i>	202	124	\$131.20	\$100.00	\$122.00	\$153.50
<i>Five year-olds not in school</i>	156	170	\$114.70	\$90.00	\$110.00	\$131.85
<i>Average weekly weekday rate</i>	234	92	\$141.05	\$107.50	\$133.33	\$164.15
Participating in QR, three-star rating						
<i>Infants</i>	35	41	\$170.56	\$132.00	\$157.00	\$200.00
<i>One-year-olds</i>	42	34	\$172.11	\$129.25	\$148.42	\$199.25
<i>Two-year-olds</i>	45	31	\$166.17	\$125.00	\$148.84	\$187.85
<i>Three-year-olds</i>	45	31	\$159.55	\$119.50	\$145.00	\$181.50
<i>Four-year-olds</i>	38	38	\$151.32	\$108.25	\$132.73	\$182.67
<i>Five year-olds not in school</i>	21	55	\$133.18	\$77.79	\$125.00	\$164.50
<i>Average weekly weekday rate</i>	46	30	\$160.14	\$115.75	\$144.50	\$178.08

Table notes:

<sup>1</sup>March administrative data were used to better capture Quality Rated participation at the time the survey was fielded.

Table 22. Home Rate Statistics by Quality Rating Based on March 2017 Administrative Data <sup>1</sup>						
Licensed Family Child Care Learning Homes	Responses	Non-respondents	Mean	Percentiles		
				25th	50th	75th
Not participating in QR or not rated						
<i>Infants</i>	627	144	\$121.29	\$90.00	\$115.00	\$145.00
<i>One-year-olds</i>	643	128	\$117.34	\$90.00	\$110.00	\$140.00
<i>Two-year-olds</i>	659	112	\$114.95	\$90.00	\$100.00	\$135.00
<i>Three-year-olds</i>	633	138	\$111.99	\$85.00	\$100.00	\$130.00
<i>Four-year-olds</i>	571	200	\$109.75	\$85.00	\$100.00	\$130.00
<i>Five year-olds not in school</i>	458	313	\$103.79	\$80.00	\$95.00	\$125.00
<i>Average weekly weekday rate</i>	688	83	\$114.96	\$88.33	\$104.17	\$135.00
Participating in QR, zero-star rating						
<i>Infants</i>	23	1	\$119.13	\$90.00	\$125.00	\$140.00
<i>One-year-olds</i>	24	0	\$110.13	\$82.50	\$120.00	\$130.00
<i>Two-year-olds</i>	24	0	\$107.21	\$82.50	\$112.50	\$128.75
<i>Three-year-olds</i>	22	2	\$110.91	\$87.50	\$112.50	\$131.25
<i>Four-year-olds</i>	20	4	\$105.50	\$82.50	\$100.00	\$125.00
<i>Five year-olds not in school</i>	17	7	\$105.88	\$82.50	\$100.00	\$127.50
<i>Average weekly weekday rate</i>	24	0	\$108.19	\$89.38	\$115.50	\$128.96
Participating in QR, one-star rating						
<i>Infants</i>	74	5	\$127.65	\$100.00	\$125.00	\$150.00

<i>One-year-olds</i>	73	6	\$122.96	\$100.00	\$120.00	\$137.50
<i>Two-year-olds</i>	73	6	\$119.54	\$100.00	\$115.00	\$135.00
<i>Three-year-olds</i>	65	14	\$115.15	\$92.50	\$110.00	\$130.00
<i>Four-year-olds</i>	59	20	\$112.29	\$90.00	\$105.00	\$125.00
<i>Five year-olds not in school</i>	45	34	\$106.33	\$85.00	\$100.00	\$122.50
<i>Average weekly weekday rate</i>	74	5	\$119.60	\$100.00	\$115.00	\$133.29
Participating in QR, two-star rating						
<i>Infants</i>	79	21	\$133.35	\$105.00	\$130.00	\$150.00
<i>One-year-olds</i>	84	16	\$125.79	\$100.00	\$125.00	\$145.00
<i>Two-year-olds</i>	86	14	\$124.53	\$100.00	\$125.00	\$141.25
<i>Three-year-olds</i>	86	14	\$121.42	\$95.00	\$120.00	\$140.00
<i>Four-year-olds</i>	75	25	\$120.85	\$95.00	\$120.00	\$140.00
<i>Five year-olds not in school</i>	64	36	\$114.70	\$85.00	\$107.50	\$138.75
<i>Average weekly weekday rate</i>	89	11	\$122.64	\$100.00	\$120.00	\$140.00
Participating in QR, three-star rating						
<i>Infants</i>	49	13	\$142.21	\$110.00	\$135.00	\$152.50
<i>One-year-olds</i>	53	9	\$138.64	\$110.00	\$130.00	\$152.50
<i>Two-year-olds</i>	56	6	\$136.75	\$105.00	\$130.00	\$153.75
<i>Three-year-olds</i>	55	7	\$137.24	\$105.00	\$130.00	\$150.00
<i>Four-year-olds</i>	49	13	\$134.16	\$101.86	\$125.00	\$152.50
<i>Five year-olds not in school</i>	39	23	\$131.00	\$100.00	\$125.00	\$150.00
<i>Average weekly weekday rate</i>	57	5	\$137.04	\$104.36	\$130.00	\$154.00

Table notes:

<sup>1</sup>March administrative data were used to better capture Quality Rated participation at the time the survey was fielded.

## Rates by Subsidy Program Participation

Table 23 shows that weekly rates for weekday care are higher for non-participating licensed centers and homes than for participating providers. For licensed centers, the average weekly weekday rate was 38% higher for non-participating programs than for participating programs. For licensed family homes, the average rate was 17% higher for non-participating providers than for participating providers. Differences at the 75<sup>th</sup> percentile were even greater, with non-participating licensed providers 59% higher for centers and 20% higher for homes.

Table 23. Licensed Center and Home Rate Statistics by Subsidy Program (CAPS) Participation						
	Responses	No Response	Mean	Percentiles		
				25th	50th	75th
Licensed child care learning centers participating in CAPS						
<i>Infants</i>	1161	398	\$150.49	\$113.50	\$143.00	\$170.00
<i>One-year-olds</i>	1218	341	\$144.02	\$105.00	\$136.50	\$165.00

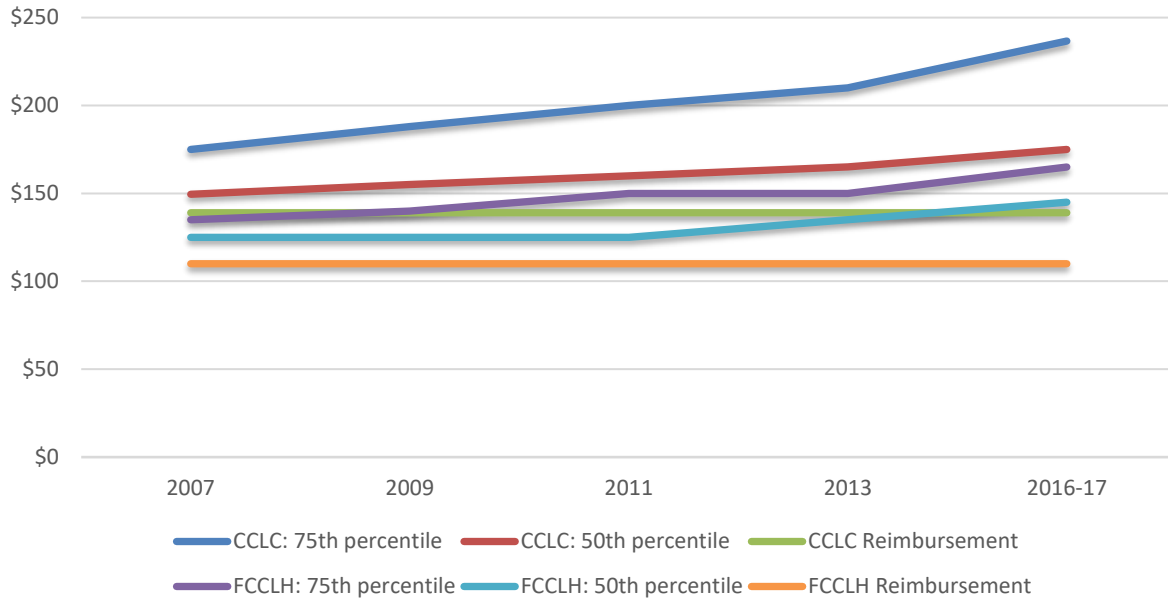
<i>Two-year-olds</i>	1231	328	\$138.92	\$105.00	\$130.00	\$158.00
<i>Three-year-olds</i>	1250	309	\$133.12	\$100.00	\$125.00	\$150.00
<i>Four-year-olds</i>	1166	393	\$126.09	\$95.00	\$120.00	\$141.22
<i>Five year-olds not in school</i>	959	600	\$117.05	\$90.00	\$110.00	\$130.00
<i>Average weekly weekday rate</i>	1258	301	\$135.62	\$102.38	\$128.33	\$153.04
Licensed child care learning centers not participating in CAPS						
<i>Infants</i>	180	357	\$222.35	\$135.25	\$220.47	\$284.88
<i>One-year-olds</i>	229	308	\$213.53	\$130.47	\$209.30	\$274.83
<i>Two-year-olds</i>	247	290	\$203.15	\$125.00	\$200.00	\$262.00
<i>Three-year-olds</i>	294	243	\$186.46	\$113.72	\$168.53	\$241.74
<i>Four-year-olds</i>	288	249	\$182.41	\$104.71	\$162.79	\$235.75
<i>Five year-olds not in school</i>	175	362	\$186.64	\$100.00	\$150.70	\$230.23
<i>Average weekly weekday rate</i>	312	225	\$187.31	\$110.00	\$167.44	\$243.15
Licensed family child care learning homes participating in CAPS						
<i>Infants</i>	360	70	\$115.95	\$95.00	\$110.00	\$135.00
<i>One-year-olds</i>	371	59	\$110.36	\$85.00	\$100.00	\$129.00
<i>Two-year-olds</i>	375	55	\$107.94	\$85.00	\$100.00	\$125.00
<i>Three-year-olds</i>	367	63	\$104.36	\$85.00	\$100.00	\$125.00
<i>Four-year-olds</i>	339	91	\$101.33	\$80.00	\$100.00	\$120.00
<i>Five year-olds not in school</i>	294	136	\$95.71	\$75.00	\$90.00	\$110.00
<i>Average weekly weekday rate</i>	382	48	\$106.81	\$85.00	\$100.00	\$125.00
Licensed family child care learning homes not participating in CAPS						
<i>Infants</i>	492	114	\$130.08	\$100.00	\$125.00	\$150.00
<i>One-year-olds</i>	506	100	\$126.56	\$95.00	\$125.00	\$150.00
<i>Two-year-olds</i>	523	83	\$124.17	\$95.00	\$120.00	\$150.00
<i>Three-year-olds</i>	494	112	\$122.48	\$90.00	\$120.00	\$145.00
<i>Four-year-olds</i>	435	171	\$121.12	\$90.00	\$115.00	\$145.00
<i>Five year-olds not in school</i>	329	277	\$116.81	\$90.00	\$110.00	\$140.00
<i>Average weekly weekday rate</i>	550	56	\$124.48	\$95.00	\$120.00	\$150.00

## State Assistance Rate Comparison

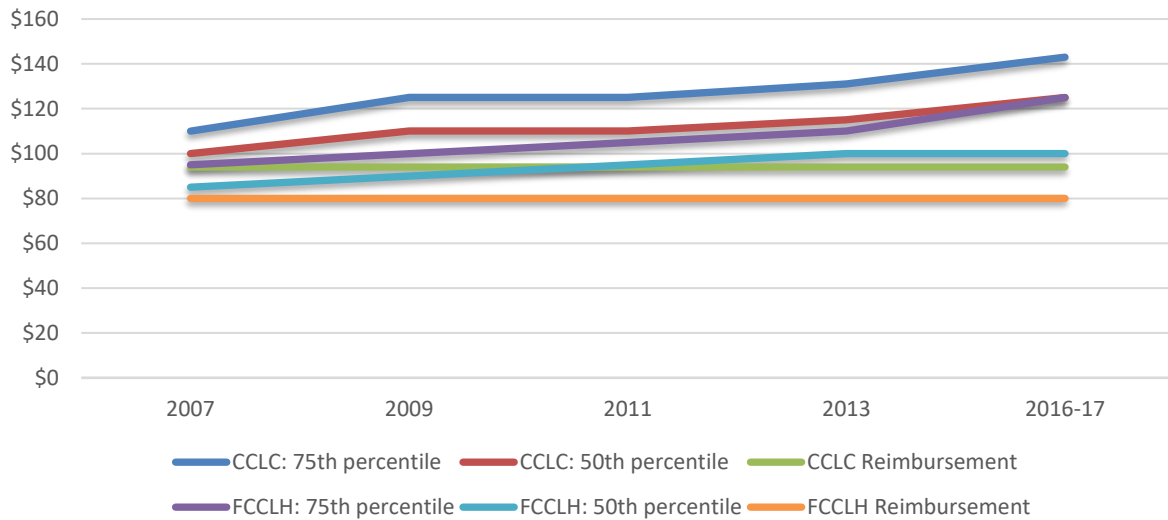
Historically, Georgia child care reimbursement rates have fallen below the 75<sup>th</sup> percentile child care market rates, and the gaps have increased over time. Because Georgia offers different levels of assistance based on market rate zones, it is appropriate to compare assistance rates to market rates for each zone. Figures 5-7 show weekday infant rates at the 50<sup>th</sup> and 75<sup>th</sup> percentiles in the last five surveys for center-based and home-based providers in each zone, along with the reimbursement rates.



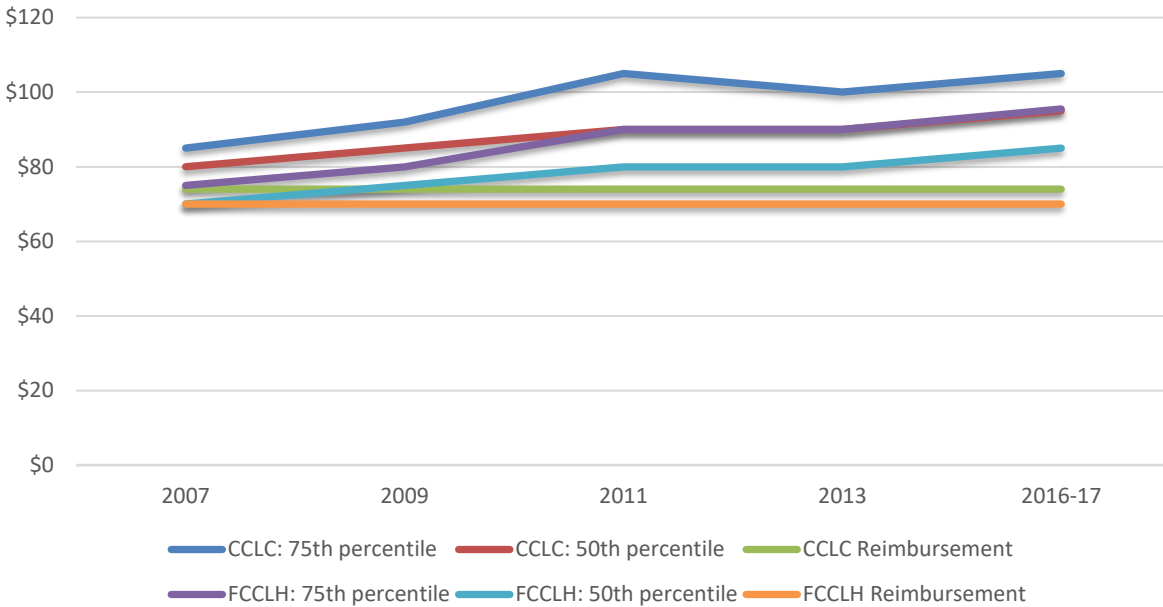
**Figure 5. Weekly Weekday Infant Care Rate Percentiles and State Reimbursement Rates for Licensed Child Care Learning Centers (CCLC) and Family Child Care Learning Homes (FCCLH)**  
Zone 1



**Figure 6. Weekly Weekday Infant Care Rate Percentiles and State Reimbursement Rates for Licensed Child Care Learning Centers (CCLC) and Family Child Care Learning Homes (FCCLH)**  
Zone 2



**Figure 7. Weekly Weekday Infant Care Rate Percentiles and State Reimbursement Rates for Licensed Child Care Learning Centers (CCLC) and Family Child Care Learning Homes (FCCLH)  
Zone 3**



## Registration Fees

Providers that indicated they charge for care were also asked whether they charge an annual registration fee and how that fee is charged. Nearly 80% of these providers reported charging a registration fee, with licensed centers most likely to do so (93%).

**Table 24. Whether Charge a Registration Fee by License Type**

	Licensed Centers	School-Based Programs	License-Exempt Programs	Licensed Family Homes	Informal Providers	Total
Yes	93%	76%	73%	63%	26%	79%
No	5%	22%	25%	34%	69%	19%
No response	1%	2%	2%	3%	5%	2%
Total that charge for child care	1,767	180	785	968	111	3,811

Provider registration fees were most likely to be an annual fee per child, but a one-time fee per child or family and an annual fee per family were also reported by some respondents.<sup>4</sup>

<sup>4</sup> Previously the provider was asked to indicate the annual amount per child, but some providers indicated they charged a one-time fee.

Table 25. Type of Registration Fee Charged by License Type

	Licensed Centers	School-Based Programs	License-Exempt Programs	Licensed Family Homes	Informal Providers	Total
Yearly fee per child	51%	44%	50%	28%	7%	45%
One-time fee per child	21%	25%	30%	40%	41%	27%
One-time fee per family	13%	18%	11%	22%	34%	15%
Yearly fee per family	14%	11%	8%	10%	17%	12%
No response	1%	1%	1%	0%	0%	1%
Total that charge a registration fee	1,650	136	572	613	29	3,000

The highest reported registration fees were in Cobb, Fulton, Oconee, DeKalb, Gwinnett, Camden, and Putnam counties.

Table 26. Median Reported Registration Fee by Type of Fee and License Type

	Licensed Centers	School-Based Programs	License-Exempt Programs	Licensed Family Homes	Informal Providers	All reporting fee	Number reporting fee
Yearly fee per child	\$65	\$40	\$90	\$65	\$45	\$65	1,351
One-time fee per child	\$65	\$25	\$90	\$50	\$32.50	\$60	815
One-time fee per family	\$65	\$20	\$50	\$50	\$32.50	\$50	454
Yearly fee per family	\$65	\$25	\$50	\$60	\$50	\$65	354

Those charging for child care were also asked whether they allow parents to pay based on the hours of child care needed or used each week. Very few providers – 12% of center-based providers and 13% of home-based providers – that charge for care indicated they did so.

## Other Charges

Center and school-based providers that charge for child care were also asked whether they offer a multi-child discount or charge other fees to parents. More than two-thirds of these programs (68%) do offer a multi-child discount, and only a small proportion (15% or fewer) charge parents additional fees as presented in Table 27.

Table 27. Whether Offer Multi-Child Discount or Charge Additional Fees by License Type

	Licensed Centers	School-Based Programs	License-Exempt Programs	Total
Offer a multi-child discount	76%	67%	52%	68%
Additional application fee	10%	3%	6%	8%
Additional activity fee	15%	3%	15%	14%
Additional materials fee	12%	2%	14%	12%
Other additional fee	8%	6%	9%	8%
Total that charge for child care	1,767	180	785	2,732

## 7. Government Subsidies and Other Funding

### Subsidized Care

All provider types were asked whether they currently provide care to children receiving child care subsidies from the state's Childcare and Parent Services (CAPS) program. Three-fourths of licensed centers and nearly two-fifths of licensed family providers reported participation in the CAPS subsidy program. While more than two-thirds of informal providers reported current participation in the CAPS subsidy program, this is unsurprising because informal providers were identified for the survey based on CAPS provider lists.

Table 28. Reported Receipt of CAPS Payments

	Licensed Centers	School-Based Programs	License-Exempt Programs	Licensed Family Homes	Informal Providers	Total
Currently receive	75%	14%	17%	39%	68%	49%
Never received	17%	70%	68%	26%	5%	35%
Received in past	8%	15%	14%	34%	25%	16%
No response	0%	1%	0%	1%	2%	1%
Total	2,096	445	1,030	1,036	189	4,796

Providers who indicated that they care for children who receive CAPS subsidies were then asked to indicate the number of those children enrolled full- and part-time. As seen in Table 29, these counts showed tremendous range, with licensed centers reporting the greatest number, on average.

Table 29. Reported CAPS Enrollment

	Licensed Centers	School-Based Programs	License-Exempt Programs	Licensed Family Homes	Informal Providers	Total
Range	0-280	0-43	1-120	0-10	1-6	0-280
Average	26	6	8	3	3	19
Median	16	3	3	2	3	7
Number reporting CAPS enrollment	1,492	64	176	389	125	2,246

Of 2,340 reporting CAPS participation, only 4% (85) reported limiting enrollment of children receiving CAPS subsidies. Of those indicating they would limit enrollment, the top reasons were low payment rates, families served would not qualify, and spaces were filled without families that would qualify.

Providers reporting CAPS participation were asked whether they charged families all or part of the difference between the total CAPS rate (reimbursement plus family's copay) and the provider's stated rate. Nearly three-fourths of providers (72%) indicated they charge families the full difference.

Table 30. Reported CAPS Differential Charge

	Licensed Centers	School-Based Programs	License-Exempt Programs	Licensed Family Homes	Informal Providers	Total
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Charge the full difference	78%	38%	66%	67%	51%	72%
Charge part of the difference	14%	5%	5%	14%	17%	13%
Do not charge the difference	4%	23%	24%	9%	22%	8%
No response	4%	34%	4%	10%	10%	6%
Total reporting CAPS participation	1,563	64	178	406	129	2,340

Additionally, CAPS participants were asked about the reasons families receiving CAPS subsidies left their center or program, with the ability to select from a list or to write in other reasons. The top reasons selected were an inability to get a certificate renewed due to lack of funds, the child went to kindergarten, or the family could not afford the copayment, as presented in Table 31.

Table 31. Reported Reasons Families Left Care						
	Licensed Centers	School-Based Programs	License-Exempt Programs	Licensed Family Homes	Informal Providers	Total
Unable to get certificate renewed due to lack of funds	61%	3%	24%	24%	3%	47%
Went to kindergarten	46%	9%	8%	32%	9%	37%
Could not afford copayment	45%	13%	18%	12%	7%	34%
Did not want to pay copayment	29%	3%	15%	13%	2%	23%
Went to a free Pre-K	40%	5%	8%	36%	11%	35%
Went to Head Start/Early Head Start	26%	3%	4%	28%	12%	23%
Provider asked family to leave	8%	0%	2%	3%	1%	6%
Dissatisfied with care	4%	0%	1%	0%	0%	3%
Total reporting CAPS participation	1,563	64	178	406	129	2,340

Other reasons cited most often included the family moved/relocated, a child in foster care moved, the child changed schools, the family's inability to get re-certified due to program criteria or a delay, lost employment, and non-payment of fees.

Of 2,422 providers reporting no or no current CAPS participation, nearly half (1,200) indicated they would accept children who are subsidized by CAPS. Programs that indicated they would not accept subsidized children were asked to mark one or more reasons, as shown in Table 32.

Table 32. Reported Reasons for Not Accepting Children Subsidized by CAPS						
	Licensed Centers	School-Based Programs	License-Exempt Programs	Licensed Family Homes	Informal Providers	Total
Not eligible to participate in CAPS	36%	64%	66%	2%	4%	34%
Families served would not qualify	56%	4%	37%	18%	0%	27%
Have full enrollment without families that would qualify	38%	28%	23%	10%	0%	20%
Too much paperwork involved	21%	8%	13%	13%	4%	13%
Families living in the area would not qualify	26%	4%	17%	7%	0%	12%

Payment rates are too low	18%	3%	7%	9%	4%	9%
Takes too long to get payments	19%	4%	7%	9%	2%	9%
Total reporting CAPS non-participation	208	162	327	456	47	1,200

## Food Program Participation

Less than half of providers reported they receive funding from the US Department of Agriculture Child and Adult Care Food Program (CACFP) for feeding children in their care. Licensed homes (72%) and centers (57%) were most likely to report food program participation, as shown in Table 33.

Table 33. Food Program Participation by License Type						
	Licensed Centers	School-Based Programs	License-Exempt Programs	Licensed Family Homes	Informal Providers	Total
Yes	57%	19%	15%	72%	10%	46%
No	42%	76%	83%	21%	83%	51%
No response	1%	4%	2%	6%	7%	3%
Total	2,096	445	1,030	1,036	189	4,796

## Other Funding

Licensed centers and license-exempt programs were asked whether they receive funding from private foundations or other grants. Eleven percent of licensed centers and 21% of license-exempt programs responded that they received this additional funding.

Many of the open-end responses noted Georgia Pre-K grants or Head Start/Early Head Start grants as funding sources. Some identified other funding sources such as the United Way, Goizueta Foundation, archdiocese/church, Housing and Urban Development (HUD), USDA (probably CACFP), Walmart, Boeing, and 21<sup>st</sup> Century Community Learning Center grants. Funding purposes included programming/education, workforce development, employee compensation, after-school and summer programs (curricula, snacks, assessments), scholarships/financial assistance, enrichment (arts, sports), supplies, maintenance, mentoring, youth programs, and general operations.

## 8. Enrollment

All providers were asked to report enrollment by age group, and center/school-based programs were asked to indicate desired enrollment as well. Due to variations in program size and services offered, enrollment varied a great deal among respondents, particularly among center/school-based programs. High 5-12 and total enrollment numbers for many schools (public, private or faith-based) suggested the schools provided total K-5 or K-8 enrollment rather than just the numbers in pre-K/preschool or before- and after-school care, as instructed.

Table 34. Reported Child Enrollment and Desired Enrollment: Centers and School-Based Programs

	Reported Enrollment					Desired Enrollment				
	Responses	Mean	Median	Minimum	Maximum	Responses	Mean	Median	Minimum	Maximum
<i>Licensed centers</i>										
Infant	1,938	7	6	0	43	1,584	9	9	0	64
One-year-old	1,959	9	8	0	62	1,576	13	12	0	62
Two-year-old	1,959	13	10	0	87	1,572	17	16	0	87
Three-year-old	1,980	17	14	0	156	1,592	22	20	0	156
Four-year-old	1,923	22	15	0	235	1,546	28	22	0	240
Five-year-old	1,500	5	0	0	150	1,155	7	0	0	150
5- to 12-year-old	1,808	28	18	0	1,683	1,443	38	25	0	3,030
Reported total	1,783	93	82	0	1,794	1,302	121	110	0	1,985
Calculated total - all ages	2,053	92	80	0	1,794	1,695	120	107	0	3,150
Calculated total - not in school	2,029	69	59	0	400	1,672	89	83	0	400
<i>School-based programs</i>										
Infant	337	0	0	0	36	239	0	0	0	16
One-year-old	337	0	0	0	46	238	0	0	0	26
Two-year-old	337	0	0	0	82	238	0	0	0	32
Three-year-old	343	3	0	0	136	240	3	0	0	71
Four-year-old	419	45	39	0	440	311	47	44	0	440
Five-year-old	328	8	0	0	279	237	5	0	0	279
5- to 12-year-old	361	253	93	0	1,142	260	233	85	0	1,142
Reported total	353	291	129	0	1,206	250	275	115	0	1,206
Calculated total - all ages	439	260	107	0	1,227	338	229	88	0	1,206
Calculated total - not in school	429	53	43	0	440	325	52	44	0	440
<i>Licensing-exempt programs</i>										
Infant	801	1	0	0	32	623	2	0	0	48
One-year-old	825	4	0	0	60	646	5	0	0	60
Two-year-old	843	9	0	0	112	672	11	0	0	96
Three-year-old	862	13	3	0	140	686	16	8	0	140
Four-year-old	858	11	3	0	153	686	15	10	0	154
Five-year-old	781	4	0	0	314	624	6	0	0	350
5- to 12-year-old	899	69	18	0	3,000	741	76	28	0	1,450
Reported total	888	93	60	0	1,350	708	112	76	0	1,500
Calculated total - all ages	1,012	96	60	0	3,000	832	112	75	0	1,500

Calculated total - not in school	894	39	16	0	456	715	52	30	0	456
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Family and informal providers were asked only for enrollment by age group. These enrollment statistics are presented in Table 35.

Table 35. Reported Child Enrollment: Family and Informal Child Care Providers										
	Licensed Family Child Care Homes					Informal Child Care Providers				
	Responses	Mean	Median	Minimum	Maximum	Responses	Mean	Median	Minimum	Maximum
Infant	851	1	1	0	7	112	1	0	0	14
One-year-old	883	1	1	0	7	107	1	1	0	4
Two-year-old	893	2	2	0	6	109	1	1	0	3
Three-year-old	873	1	1	0	6	107	1	0	0	4
Four-year-old	758	1	0	0	7	109	1	0	0	2
Five-year-old	616	0	0	0	3	84	0	0	0	2
5- to 12-year-old	766	1	1	0	12	134	2	1	0	7
Calculated total - all ages	1,002	6	6	0	25	171	3	3	1	16
Calculated total - not in school	995	5	6	0	25	164	2	2	0	14

#### Enrollment Table Notes:

Respondents were asked to enter enrollment by age (infant, 1, 2, 3, 4, 5-year-olds not in school and children ages 5-12, or school-age) and in total. They were also asked to enter a "0" if no children in the age group were enrolled. Reported totals are the totals center and school-based programs reported. Family and informal providers were not asked to report totals. The calculated totals are the sum of the reported age-group enrollments.

## Special Needs Enrollment

Centers and school-based programs were asked to indicate the numbers of children enrolled who had an Individualized Education Plan (IEP) and/or an Individual Family Service Plan (IFSP). An IFSP is a plan for supports and services for families of children from birth to three years of age with developmental delays. An IEP is an educational plan for children ages three and over with special educational needs. The IEP is designed to help teachers and paraprofessionals understand the student's individual learning needs.

Table 36. Reported Enrollment of Children with an IEP or IFSP						
		Responses	Minimum	Maximum	Mean	Median
Licensed centers	Number with an IEP	1,885	0	160	2	0
	Number with an IFSP	1,718	0	126	0	0
School-based programs	Number with an IEP	416	0	131	10	3
	Number with an IFSP	366	0	22	0	0
License-exempt programs	Number with an IEP	934	0	250	6	0
	Number with an IFSP	876	0	87	1	0
Combined centers/school-based programs/license-exempt programs	Number with an IEP	3,235	0	250	4	0
	Number with an IFSP	2,960	0	126	0	0



## 9. Staffing

Two of the three survey forms contained questions about provider staff and education. The center survey included three counts of staff – by position, hours worked, and education level – as well as information about hourly wages. On the family/informal provider survey, this component was much smaller, and consisted of questions about the care provider's education and languages spoken, as well as a single question about other paid staff or assistants. The public-school version did not request staffing information.

### Staff Counts

Licensed centers and license-exempt programs were asked to report the number of staff in three grids: by hours worked (full-time and part-time), by type of position, and by education level. In general, data reported in the staff sections of the survey should be used with caution, as totals often varied a great deal among grids for the same provider.

The following table shows two views of staff data: by hours worked and by type of position. The count by education level follows in the next section.

		Responses	Minimum	Maximum	Mean	Median
Licensed centers	Full-time staff	1,977	0	93	12	9
	Part-time staff	1,897	0	75	4	3
	Directors/assistant directors	2,022	0	15	2	2
	Lead teachers	2,004	0	45	6	5
	Assistant teachers	1,941	0	64	6	5
	Social work/family services staff	1,538	0	18	0	0
	Other staff	1,835	0	38	1	1
License-exempt programs	Full-time staff	806	0	53	4	1
	Part-time staff	882	0	221	10	6
	Directors/assistant directors	901	0	23	2	1
	Lead teachers	861	0	201	6	4
	Assistant teachers	836	0	93	5	2
	Social work/family services staff	717	0	13	0	0
	Other staff	761	0	67	1	0
Combined licensed centers and license-exempt programs	Full-time staff	2,783	0	93	9	6
	Part-time staff	2,779	0	221	6	4
	Directors/assistant directors	2,923	0	23	2	2
	Lead teachers	2,865	0	201	6	5

Assistant teachers	2,777	0	93	6	4
Social work/family services staff	2,255	0	18	0	0
Other staff	2,596	0	67	1	1

Nineteen percent of family and informal providers reported they had one or more paid staff or assistants.

Table 38. Reported Paid Staff or Assistants by Home-Based Providers			
Number reported	Licensed Family Homes	Informal Providers	Total
One	83%	80%	83%
Two	12%	0%	11%
Three	1%	0%	1%
Four	0%	0%	0%
Total reporting paid staff or assistants	217	15	232
Percent reporting paid staff or assistants	21%	8%	19%
Total number in license category	1,036	189	1,225

## Teacher Qualifications and Pay Rates

### Center/Program/School Staff Education

Center and school-based programs were asked to report the highest level of education for each of their lead and assistant teachers.

Table 39. Reported Staff Highest Education Levels											
	Education Level	Lead Teachers					Assistant Teachers				
		Responses	Min	Max	Mean	Median	Responses	Min	Max	Mean	Median
Licensed centers	Post-graduate degree	1,134	0	34	1	1	1,031	0	9	1	1
	Bachelor's degree	1,459	0	114	3	2	1,049	0	10	1	1
	Associate degree	1,287	0	22	2	1	844	0	10	0	0
	Technical college diploma	989	0	12	1	0	716	0	6	0	0
	Technical college certificate of credit	1,134	0	15	2	1	754	0	10	0	0
	Child Development Associate credential	1,458	0	31	3	2	824	0	201	1	0
	Some college, no CDA credential or degree	1,248	0	66	3	2	790	0	14	1	0
	High school diploma/GED	1,453	0	50	5	3	764	0	48	1	0
	Some high school	811	0	48	1	0	620	0	48	0	0
License-exempt	Post-graduate degree	538	0	38	2	1	565	0	24	1	1
	Bachelor's degree	689	0	98	5	3	541	0	9	1	1
	Associate degree	509	0	100	2	1	372	0	28	0	0
	Technical college diploma	407	0	11	0	0	343	0	6	0	0

	Technical college certificate of credit	389	0	12	0	0	329	0	4	0	0
	Child Development Associate credential	432	0	22	1	0	335	0	4	0	0
	Some college, no CDA credential or degree	557	0	64	2	1	395	0	62	1	0
	High school diploma/GED	589	0	52	3	2	372	0	88	1	0
	Some high school	377	0	31	1	0	329	0	31	0	0
Combined licensed and license-exempt programs	Post-graduate degree	1,672	0	38	1	1	1,596	0	24	1	1
	Bachelor's degree	2,148	0	114	4	2	1,590	0	10	1	1
	Associate degree	1,796	0	100	2	1	1,216	0	28	0	0
	Technical college diploma	1,396	0	12	1	0	1,059	0	6	0	0
	Technical college certificate of credit	1,523	0	15	1	1	1,083	0	10	0	0
	Child Development Associate credential	1,890	0	31	2	1	1,159	0	201	1	0
	Some college, no CDA credential or degree	1,805	0	66	3	1	1,185	0	62	1	0
	High school diploma/GED	2,042	0	52	4	3	1,136	0	88	1	0
	Some high school	1,188	0	48	1	0	949	0	48	0	0

### Family/Informal Provider Education

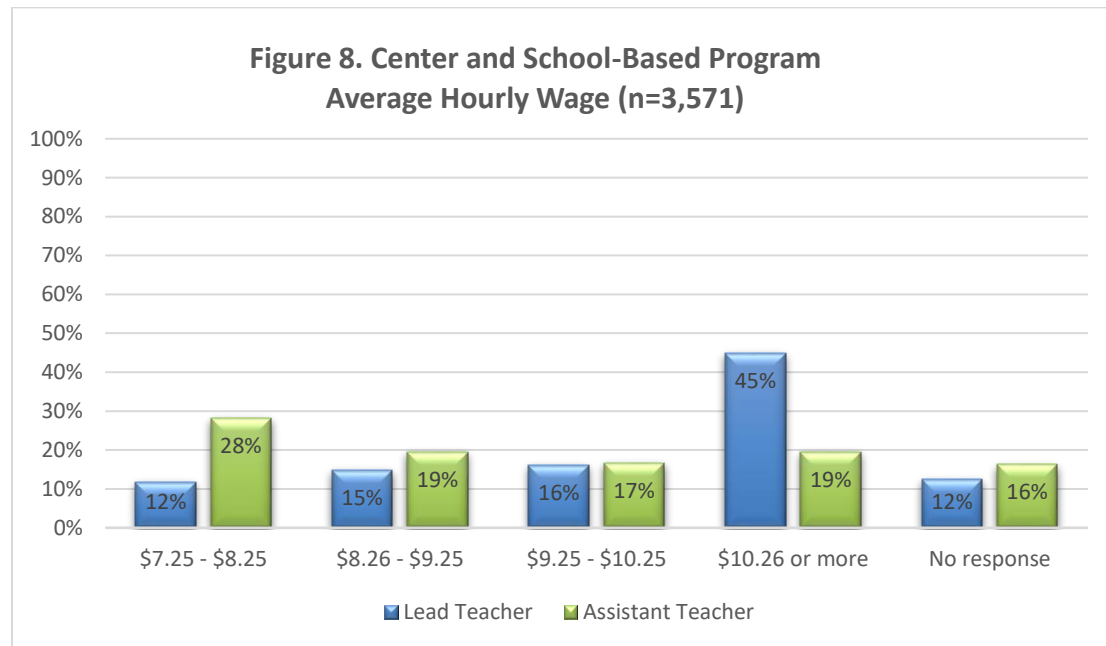
Family/informal respondents were asked to mark their own highest level of education. Where the same provider marked multiple levels (possible only on a paper form), only the highest was entered. For 33%, the highest education level was some high school or a high school diploma or GED. Twelve percent (compared to 10% in 2013) reported a four-year degree or higher, and 38% reported having a Child Development Associate credential or a one- or two-year degree.

	Licensed family homes	Informal providers	Total
Some high school	3%	9%	4%
High school diploma or GED	29%	30%	29%
Some college, but no Child Development Associate (CDA) credential or degree	18%	22%	19%
Child Development Associate (CDA) credential	15%	7%	14%
Technical certificate of credit	7%	8%	8%
Technical college diploma	8%	6%	8%
Associate degree	7%	9%	8%
Bachelor's degree	8%	6%	8%
Credential or degree beyond bachelor's (master's, specialist, doctoral, other)	4%	2%	4%
No response	1%	2%	1%
Total	1,036	189	1,225

### Center/Program/School Pay Rates

Center and school-based programs were asked to mark an hourly pay range for their full-time and part-time staff. If a respondent using a paper form marked multiple pay ranges for the same category of staff, only one was entered: the highest of two sequential options or the middle (or high-middle) of any range.

Not surprisingly, lead teacher wages were higher on average than those of assistant teachers.



Pay rates differed somewhat by type of provider, with schools and license-exempt programs more likely to pay lead teachers \$10.26 or more per hour (73% and 54%) compared to licensed centers (34%).

	Licensed centers	School-based programs	License-exempt programs	Total
<i>Lead Teacher</i>				
\$7.25 - \$8.25	17%	2%	5%	12%
\$8.26 - \$9.25	20%	2%	9%	15%
\$9.25 - \$10.25	19%	4%	17%	16%
\$10.26 or more	34%	73%	54%	45%
No response	9%	20%	15%	12%
<i>Assistant Teacher</i>				
\$7.25 - \$8.25	38%	15%	15%	28%
\$8.26 - \$9.25	22%	13%	17%	19%
\$9.25 - \$10.25	16%	19%	18%	17%
\$10.26 or more	11%	38%	28%	19%
No response	14%	15%	22%	16%
Total	2,096	445	1,030	3,571

## Language Diversity

More than half (51%) of centers and school-based programs reported having children with a home language other than English enrolled. Of the 1,809 providers with these children enrolled, 31% reported offering instruction in Spanish, and 8% reported offering instruction in another home language. Of the 31% offering instruction in Spanish, 12% also reported offering instruction in another language. Other languages cited by two or more providers were an African language, Arabic, Chinese, Farsi, French, German, Hindi, Indian dialect, Italian, Japanese, Korean, Portuguese, Romanian, and Vietnamese.

Family/informal providers were asked about the languages they speak themselves. The vast majority reported English (96%, compared to 98% in 2013); a small percentage reported Spanish (4%), and 4% reported other languages.

Table 42. Reported Languages Spoken by Provider			
	Licensed family homes	Informal providers	Total
English	96%	94%	96%
Spanish	5%	2%	4%
Other	4%	3%	4%
Total	1,036	189	1,225

Following are languages spoken as reported by two or more family/informal providers: Arabic, American Sign Language, Farsi, French, German, Italian, and Russian.

The survey forms were made available in Spanish (on paper), and all communications to providers on the mailing list included instructions on requesting Spanish materials and contacting Spanish-speaking survey staff. Only one respondent requested and returned a Spanish-language paper form.

## 10. Quality Rated

All providers except for public school-based programs were asked about their participation in Georgia's Quality Rated program. Overall, one-third (compared to one-fifth in 2013) reported participating in the program. Nearly a fourth (22%) reported that they intend to begin participating in the near future.

Because most types of license-exempt providers are not eligible for participation, the following chart shows responses based on license type. Among respondents most likely to be eligible – licensed centers and family child care providers – only 1% reported not having heard of the program. In other categories of respondents, approximately one-fourth had not heard of Quality Rated (compared to about one-half in 2013).

Table 43. Quality Rated Participation

	Licensed centers	License-exempt programs	Licensed family homes	Informal providers	Total
Yes	45%	6%	36%	12%	32%
No (combined “no” responses)	51%	81%	60%	83%	62%
No, but plan to participate in near future	30%	6%	21%	22%	22%
No, have no plans to participate	10%	15%	24%	5%	14%
No, not sure whether to participate	8%	10%	13%	10%	10%
No, have not heard of this program	1%	22%	1%	25%	7%
No, not eligible for this program	2%	27%	0%	21%	8%
No response	4%	13%	4%	5%	6%
Total (excludes public school-based programs)	2,096	1,030	1,036	189	4,351

The total number of providers reporting Quality Rated (QR) participation was 1,403. These providers were asked about the benefits and costs of the program and whether the benefits were worth the investment costs. The top benefits were improved teaching practices and with materials and equipment. The top costs were materials and equipment and professional development. Most providers reported the benefits were worth the investment/costs. The results are presented in Tables 44-46.

Table 44. Reported QR benefits

	Licensed centers	License-exempt programs	Licensed family homes	Informal providers	Total
Improves teaching practices	67%	75%	66%	35%	67%
Helps in adding materials/equipment	59%	59%	73%	22%	62%
Helps in replacing materials/equipment	56%	46%	63%	17%	57%
Current families feel more positive about center/program	54%	56%	57%	48%	55%
Tiered reimbursement helps serve families	52%	20%	40%	39%	47%
Helps recruit new families	46%	56%	43%	22%	45%
Center/program more profitable	24%	20%	29%	22%	26%
Staff feel more professional	51%	51%	NA	NA	NA
Total reporting QR participation	943	59	378	23	1,403

Table 45. Reported Two Largest Costs of QR Participation

	Licensed centers	License-exempt programs	Licensed family homes	Informal providers	Total
Materials/equipment	63%	66%	75%	61%	67%
Professional development	38%	61%	42%	48%	40%
More staff with higher qualifications requiring higher salaries	40%	22%	NA	NA	NA

Increased number of staff	18%	15%	NA	NA	NA
Renovations	12%	8%	37%	13%	19%
Increased management oversight	7%	2%	NA	NA	NA
Total reporting QR participation	943	59	378	23	1,403

Table 46. Reported that QR Benefits Worth the Investment/Costs

	Licensed centers	License-exempt programs	Licensed family homes	Informal providers	Total
Benefits are worth investment/costs	78%	83%	78%	65%	78%
Total reporting QR participation	943	59	378	23	1,403

Center/school-based programs were asked if they had received a rating, the number of stars received, and whether they had posted the rating in the center or informed parents of the rating.

- Of the 1,002 center/school-based programs indicating participation, 70% reported receiving a star rating.
- Of the 700 that reported receiving a star rating, 37% reported a one-star rating, 48% reported a two-star rating, and 13% reported a three-star rating.
- Of 681 reporting a rating, 94% reported posting the rating in their lobby or reception area, and 88% reported informing parents of the rating by letter, email or newsletter.

## 11. Summary of Rate Changes

Results indicated statewide 75<sup>th</sup> percentile site-based market rates increased by 0% to 15% from the 2013 survey to the 2016-2017 survey, depending on the rate and age group category.

- Licensed child care learning centers: 75<sup>th</sup> percentile rates for infants increased from \$173 to \$180 per week (4%); for three-year-olds, from \$150 to \$160 per week (7%); and for before- and after-school care (school age), from \$76 to \$85 per week (12%).
- Licensed family child care learning homes: 75<sup>th</sup> percentile rates for infants increased from \$135 to \$149 per week (10%) and for three-year-olds, from \$125 to \$135 per week (8%); and for before- and after-school care (school age), from \$65 to \$75 per week (15%).

Georgia groups its 159 counties into three market rate zones to reflect market differences in the price of child care. Analysis of county-level population and economic indicators as well as current market rates suggested some county reassignments to better reflect the markets in those counties, with a recommendation that two counties be moved from Zone 2 to Zone 1 and 11 counties be moved from Zone 2 to Zone 3.

Analyses of the 2016-2017 child care market rates included comparisons of rate percentiles over time, by market rate zone, by participation in the state's Quality Rate program, and by participation in the state's child care subsidy program.

- For licensed centers and family child care homes, 75<sup>th</sup> percentile rates have increased over time. Weekly weekday rates for infants and three-year-olds have increased 33% to 39% since 2005 for these providers.
- Historically, and again this year, Georgia child care reimbursement rates have fallen below the 75<sup>th</sup> percentile child care market rates, and the gaps have increased over time.
- Rate comparisons based on quality ratings showed that the 75<sup>th</sup> percentile average weekly center rate for weekday care was 6% (approximately \$10) higher for three-star rated programs than for non-participating or unrated programs and 20% higher than for programs with a zero-star rating; rates generally increased as the number of rating stars increased.
- The subsidy program participation comparison showed that, for licensed centers, average weekly rates for weekday care were 38% higher for non-participating programs than for participating programs. For licensed family homes, the average rate for non-participating homes was 17% higher.

### **Recommendations for Future Market Rate Surveys**

Based on the new federal guidance and experience with the current and 2013 child care market rate surveys, there are some areas in which the processes can be improved for future surveys.

1. Collect email addresses for all providers, including family and informal providers, through the licensing and payment systems.
2. Revamp the enrollment question instructions and structure to improve enrollment data collection for the purpose of determining slot-based rate statistics.
3. Restructure the school version of the survey to clarify reporting of rates and enrollment for multiple programs, including preschool, pre-k, before- and after-school, and summer care programs.
4. Allow more time between survey distributions so that providers have sufficient time to respond before the next email or mail distribution, and limit the survey distribution and response period to three months, avoiding major holiday seasons.