



# 2021-2022 Buncombe County Infant-Toddler Child Care Landscape Study

March 2022



# 2021-2022 Infant-Toddler Child Care Landscape Study

As more and more women with young children enter the workforce and with the growth of nontraditional families, the need for child care has increased. Research time and again points to the pronounced effects that a high quality child care experience can have on a child's school readiness and life-long success. As an equity strategy, high quality early care and education provides even greater benefits for young children living in poverty. Further, investments in high quality early care and education have a multi-generational effect, not only providing a safe and nurturing place for children, but also supporting families as they work or further their own education. With the ravaging worldwide effects of the COVID-19 pandemic also destroying the child care infrastructure that North Carolina has spent decades building, a specific, concerted effort at rebuilding this indispensable resource for working parents must emerge as priority one in our state.

Given these factors, the status of child care for our youngest children must be examined to help inform our future direction. As part of the statewide Infant-Toddler Child Care Landscape Study funded by the NC Early Education Coalition, Think Babies™ NC Alliance, data were collected and analyzed on infants and toddlers and their families as well as on early care and education centers and homes in each county. This report summarizes key findings from a variety of sources designed to paint a picture of the infant-toddler early care and education landscape within the county.

Data in this report focus solely on licensed child care programs (centers and homes) serving children birth through five years old and the children in these programs. Except where noted, data do not reflect total population numbers, but only those birth to five year old children using licensed early care and education programs in North Carolina. For purposes of this report, infants and toddlers are defined as young children birth up to age three (36 months). Throughout the report, data from various points in time are discussed to show both trend data and the effects of the COVID-19 pandemic.

Detailed information about source data, methodology and data limitations can be found in the statewide Infant-Toddler Child Care Landscape Study at [childcareservices.org](https://childcareservices.org). Totals may not equal one hundred percent due to rounding.





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|--------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Status of Young Children</b><br>     | <ul style="list-style-type: none"> <li>• <b>7,190</b> Number of infants, one and two year olds in the county.<sup>1</sup></li> <li>• <b>4,569</b> Number of infants, one and two year olds with all parents working.<sup>1,2</sup></li> <li>• <b>1,239</b> Current number of infant-toddler spaces in licensed early care and education programs.<sup>3</sup></li> <li>• <b>13%</b> Vacancy Rate.<sup>3</sup></li> </ul>                                                                                                              |
| <b>Cost of Child Care</b><br>           | <ul style="list-style-type: none"> <li>• <b>\$948</b> Median monthly full-time cost for an infant.<sup>4</sup></li> <li>• <b>\$944</b> Median monthly full-time cost for a one year old.<sup>4</sup></li> <li>• <b>\$909</b> Median monthly full-time cost for a two year old.<sup>4</sup></li> <li>• <b>0%</b> Programs that offer a sliding fee scale for parents.<sup>3</sup></li> <li>• <b>21%</b> Programs that offer a multi-child discount for parents.<sup>3</sup></li> </ul>                                                 |
| <b>Program Schedules</b><br>           | <ul style="list-style-type: none"> <li>• <b>64%</b> Programs open at or before 7:00 am.<sup>3</sup></li> <li>• <b>20%</b> Programs close at or after 6:00 pm.<sup>3</sup></li> <li>• <b>10.50</b> Median number of hours programs are open each weekday.<sup>3</sup></li> <li>• <b>0%</b> Programs open on Saturdays.<sup>3</sup></li> <li>• <b>0%</b> Programs open on Sundays.<sup>3</sup></li> </ul>                                                                                                                               |
| <b>Workforce Salary/Education</b><br> | <ul style="list-style-type: none"> <li>• <b>\$13.00/hr</b> Median starting wage for assistants in infant-toddler rooms.<sup>4</sup></li> <li>• <b>\$15.00/hr</b> Median starting wage for teachers in infant-toddler rooms.<sup>4</sup></li> <li>• <b>65%</b> Programs that require assistants in infant-toddler rooms to have at least some formal education past high school.<sup>4</sup></li> <li>• <b>39%</b> Programs that require teachers in infant-toddler rooms to have at least an associate degree.<sup>4</sup></li> </ul> |
| <b>Program Services</b><br>           | <ul style="list-style-type: none"> <li>• <b>32%</b> Programs that have bilingual staff available who work with infants-toddlers.<sup>4</sup></li> <li>• <b>3%</b> Programs that offer transportation services to infants-toddlers.<sup>4</sup></li> <li>• <b>18%</b> Programs that offer part time care for infants-toddlers.<sup>3</sup></li> </ul>                                                                                                                                                                                  |

## Footnotes:

<sup>1</sup> [North Carolina Office of State Budget and Management, Sex and Single Years of Age.](#)

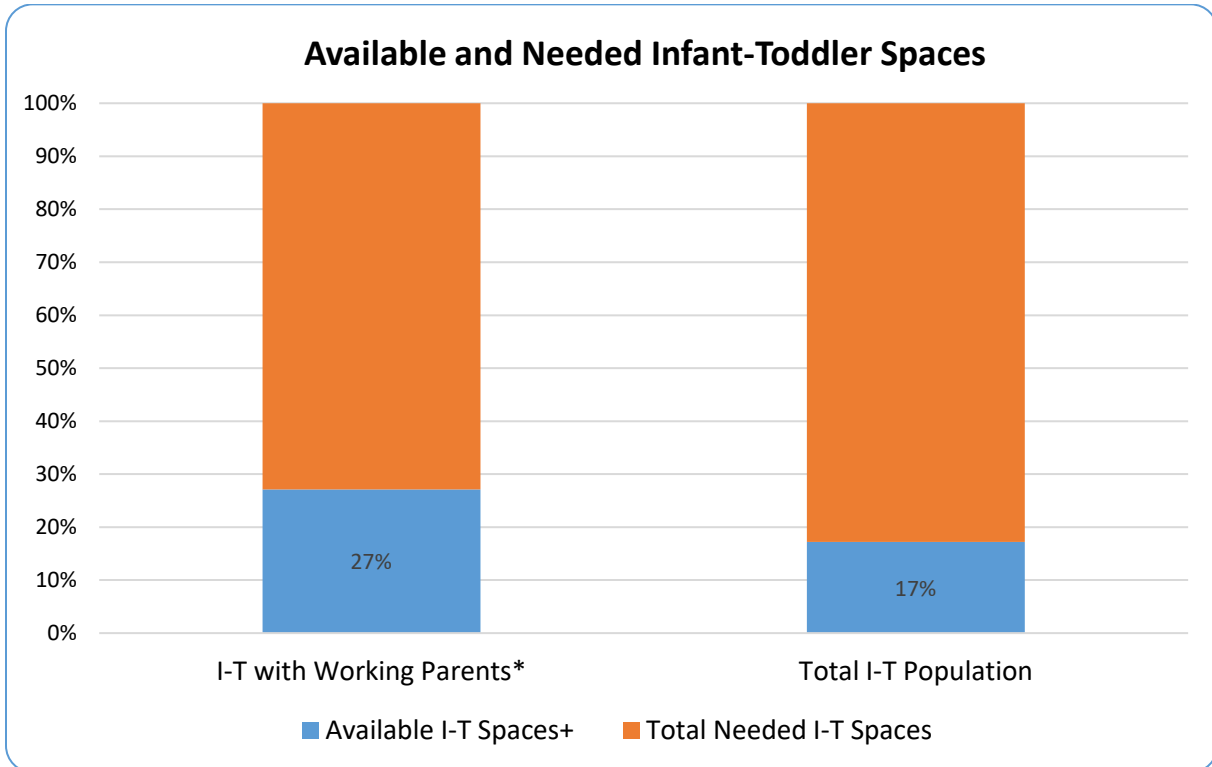
<sup>2</sup> U.S. Census, American Community Survey. Table B23008, 5-year estimate.

<sup>3</sup> North Carolina Child Care Resource and Referral System, WorkLife Systems database. October 2021. (Includes public programs.)

<sup>4</sup> Child Care Services Association Survey to child care providers. December 2021-February 2022. 48% response rate from centers and homes. (Does not include public programs.)

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## Infants and Toddlers and Their Parents



\*Working parent data based on parents of children under 6. Information on the percentage of infants and toddlers with working parents is unavailable.

+Available spaces include both current enrollment numbers and full/part time open spaces.

Source: WorkLife Systems, October 2021; NC Office of State Budget & Management, 9/30/21; 2015-2019 American Community Survey 5-Year Estimates.



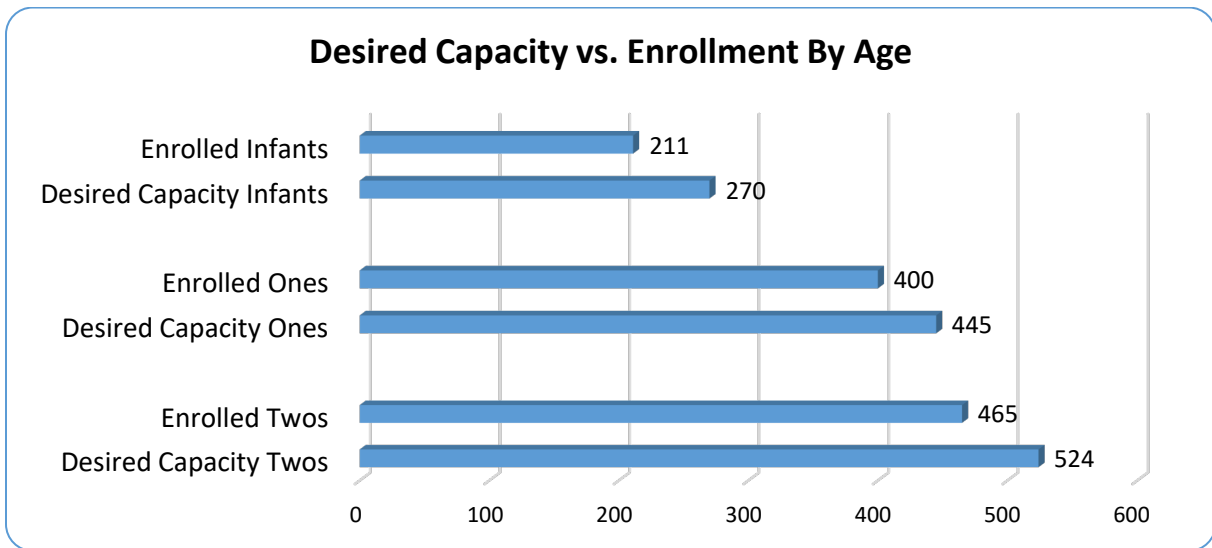


## Programs and Enrollment

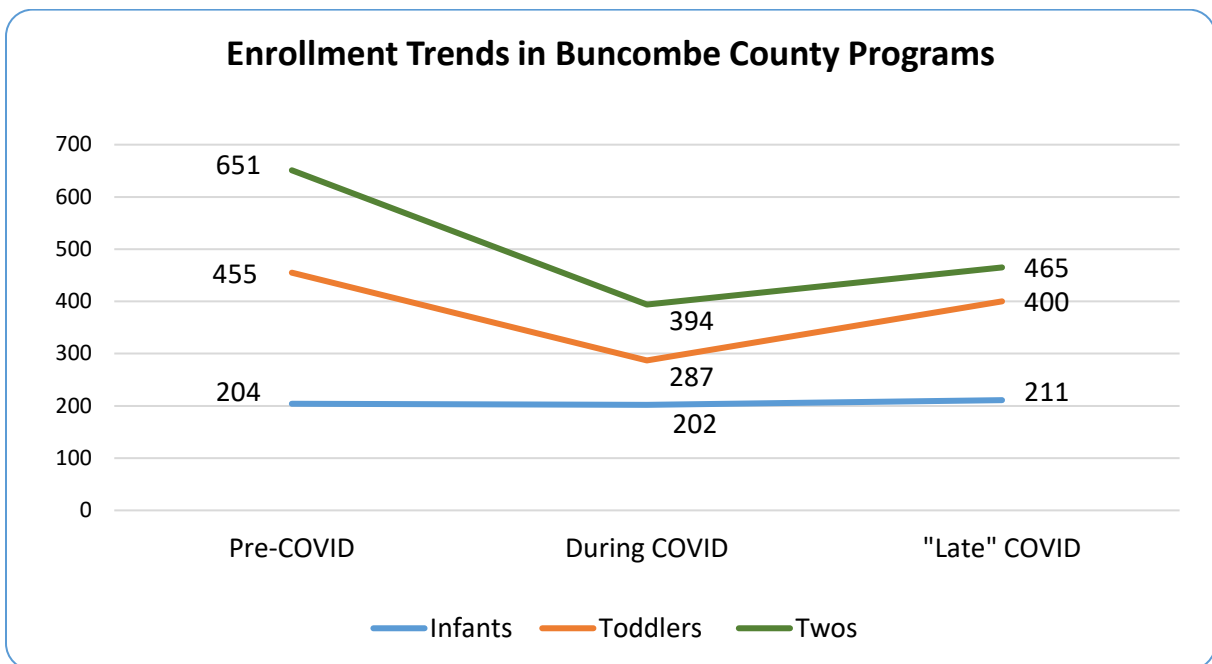
| <b>Number and Percent of Each Program Type Serving Infants and/or Toddlers by Star Rating</b>                                                                                                                                                                                                                                                                                                          |                                                    |             |                                                   |             |                                                   |             |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------|-------------|---------------------------------------------------|-------------|---------------------------------------------------|-------------|
| <b>License Level</b>                                                                                                                                                                                                                                                                                                                                                                                   | Statewide Programs Serving Infants and/or Toddlers |             | Suburban Programs Serving Infants and/or Toddlers |             | Buncombe Programs Serving Infants and/or Toddlers |             |
|                                                                                                                                                                                                                                                                                                                                                                                                        | #                                                  | %           | #                                                 | %           | #                                                 | %           |
| 5-Star Centers                                                                                                                                                                                                                                                                                                                                                                                         | 756                                                | 36%         | 179                                               | 32%         | 13                                                | 45%         |
| 4-Star Centers                                                                                                                                                                                                                                                                                                                                                                                         | 567                                                | 27%         | 157                                               | 28%         | 9                                                 | 31%         |
| 3-Star Centers                                                                                                                                                                                                                                                                                                                                                                                         | 466                                                | 22%         | 115                                               | 21%         | 4                                                 | 14%         |
| 2-Star Centers                                                                                                                                                                                                                                                                                                                                                                                         | 4                                                  | 0%          | 2                                                 | 0%          | 0                                                 | 0%          |
| 1-Star Centers                                                                                                                                                                                                                                                                                                                                                                                         | 51                                                 | 2%          | 12                                                | 2%          | 1                                                 | 3%          |
| GS-110 Centers                                                                                                                                                                                                                                                                                                                                                                                         | 168                                                | 8%          | 55                                                | 10%         | 0                                                 | 0%          |
| Other* Centers                                                                                                                                                                                                                                                                                                                                                                                         | 111                                                | 5%          | 33                                                | 6%          | 2                                                 | 7%          |
| <b>Total Centers</b>                                                                                                                                                                                                                                                                                                                                                                                   | <b>2,123</b>                                       | <b>100%</b> | <b>553</b>                                        | <b>100%</b> | <b>29</b>                                         | <b>100%</b> |
| 5-Star Homes                                                                                                                                                                                                                                                                                                                                                                                           | 120                                                | 12%         | 31                                                | 13%         | 1                                                 | 11%         |
| 4-Star Homes                                                                                                                                                                                                                                                                                                                                                                                           | 401                                                | 40%         | 83                                                | 36%         | 1                                                 | 11%         |
| 3-Star Homes                                                                                                                                                                                                                                                                                                                                                                                           | 312                                                | 31%         | 72                                                | 31%         | 6                                                 | 67%         |
| 2-Star Homes                                                                                                                                                                                                                                                                                                                                                                                           | 71                                                 | 7%          | 15                                                | 6%          | 0                                                 | 0%          |
| 1-Star Homes                                                                                                                                                                                                                                                                                                                                                                                           | 87                                                 | 9%          | 21                                                | 9%          | 1                                                 | 11%         |
| Other* Homes                                                                                                                                                                                                                                                                                                                                                                                           | 24                                                 | 2%          | 9                                                 | 4%          | 0                                                 | 0%          |
| <b>Total Homes</b>                                                                                                                                                                                                                                                                                                                                                                                     | <b>1,015</b>                                       | <b>100%</b> | <b>231</b>                                        | <b>100%</b> | <b>9</b>                                          | <b>100%</b> |
| <p>The table above indicates the percentage of each type of program (center vs. home) with the given star level and enrollment age group. For example, of the 2,123 centers serving infants and toddlers, 756 of them, or 36% have 5-stars.</p> <p>* "Other" centers and homes include those with a temporary, provisional or probationary license.</p> <p>Source: WorkLife Systems, October 2021.</p> |                                                    |             |                                                   |             |                                                   |             |

| Infant-Toddler Enrollment by Program Type |           |     |          |     |                 |     |
|-------------------------------------------|-----------|-----|----------|-----|-----------------|-----|
|                                           | Statewide |     | Suburban |     | Buncombe County |     |
|                                           | #         | %   | #        | %   | #               | %   |
| Centers                                   | 47,925    | 95% | 13,432   | 96% | 1,048           | 97% |
| Homes                                     | 2,348     | 5%  | 543      | 4%  | 28              | 3%  |
| Source: WorkLife Systems, October 2021.   |           |     |          |     |                 |     |





Source: WorkLife Systems, CCR&R data October 2021.



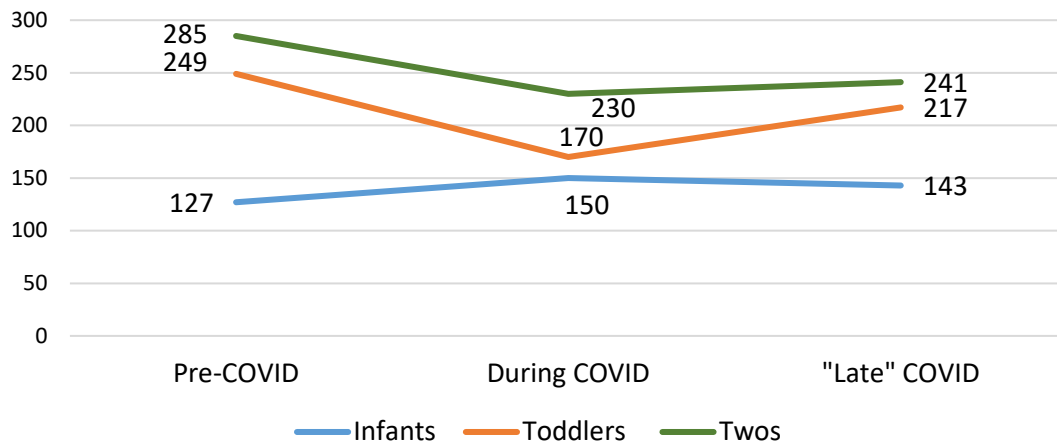
Source: DCDEE licensing data, 3/20; WorkLife Systems data, 2/21; WorkLife Systems data 10/21.



| Infant-Toddler Enrollment Numbers and Percentages by Star Level                                                                                                                                                                                                                                                                                                                                         |                                     |             |                                    |             |                                    |             |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------|-------------|------------------------------------|-------------|------------------------------------|-------------|
| License Level                                                                                                                                                                                                                                                                                                                                                                                           | Statewide Infant-Toddler Enrollment |             | Suburban Infant-Toddler Enrollment |             | Buncombe Infant-Toddler Enrollment |             |
|                                                                                                                                                                                                                                                                                                                                                                                                         | #                                   | %           | #                                  | %           | #                                  | %           |
| 5-Star Centers                                                                                                                                                                                                                                                                                                                                                                                          | 21,050                              | 44%         | 5,232                              | 39%         | 597                                | 57%         |
| 4-Star Centers                                                                                                                                                                                                                                                                                                                                                                                          | 10,752                              | 22%         | 3,313                              | 25%         | 225                                | 21%         |
| 3-Star Centers                                                                                                                                                                                                                                                                                                                                                                                          | 7,654                               | 16%         | 2,081                              | 15%         | 85                                 | 8%          |
| 2-Star Centers                                                                                                                                                                                                                                                                                                                                                                                          | 85                                  | 0%          | 44                                 | 0%          | 0                                  | 0%          |
| 1-Star Centers                                                                                                                                                                                                                                                                                                                                                                                          | 1,946                               | 4%          | 409                                | 3%          | 74                                 | 7%          |
| GS-110 Centers                                                                                                                                                                                                                                                                                                                                                                                          | 4,663                               | 10%         | 1,772                              | 13%         | 0                                  | 0%          |
| Other* Centers                                                                                                                                                                                                                                                                                                                                                                                          | 1,775                               | 4%          | 581                                | 4%          | 67                                 | 6%          |
| <b>Total Centers</b>                                                                                                                                                                                                                                                                                                                                                                                    | <b>47,925</b>                       | <b>100%</b> | <b>13,432</b>                      | <b>100%</b> | <b>1,048</b>                       | <b>100%</b> |
| 5-Star Homes                                                                                                                                                                                                                                                                                                                                                                                            | 274                                 | 12%         | 78                                 | 14%         | 4                                  | 14%         |
| 4-Star Homes                                                                                                                                                                                                                                                                                                                                                                                            | 932                                 | 40%         | 192                                | 35%         | 4                                  | 14%         |
| 3-Star Homes                                                                                                                                                                                                                                                                                                                                                                                            | 687                                 | 29%         | 171                                | 31%         | 16                                 | 57%         |
| 2-Star Homes                                                                                                                                                                                                                                                                                                                                                                                            | 190                                 | 8%          | 32                                 | 6%          | 0                                  | 0%          |
| 1-Star Homes                                                                                                                                                                                                                                                                                                                                                                                            | 233                                 | 10%         | 55                                 | 10%         | 4                                  | 14%         |
| Other* Homes                                                                                                                                                                                                                                                                                                                                                                                            | 32                                  | 1%          | 15                                 | 3%          | 0                                  | 0%          |
| <b>Total Homes</b>                                                                                                                                                                                                                                                                                                                                                                                      | <b>2,348</b>                        | <b>100%</b> | <b>543</b>                         | <b>100%</b> | <b>28</b>                          | <b>100%</b> |
| <p>The table above indicates the percentage enrolled in each type of program (center vs. home) with the given star level. For example, of the 47,925 infants and toddlers enrolled in centers, 21,050 of them, or 44% are in 5-star centers.</p> <p>* "Other" centers and homes include those with a temporary, provisional or probationary license.</p> <p>Source: WorkLife Systems, October 2021.</p> |                                     |             |                                    |             |                                    |             |



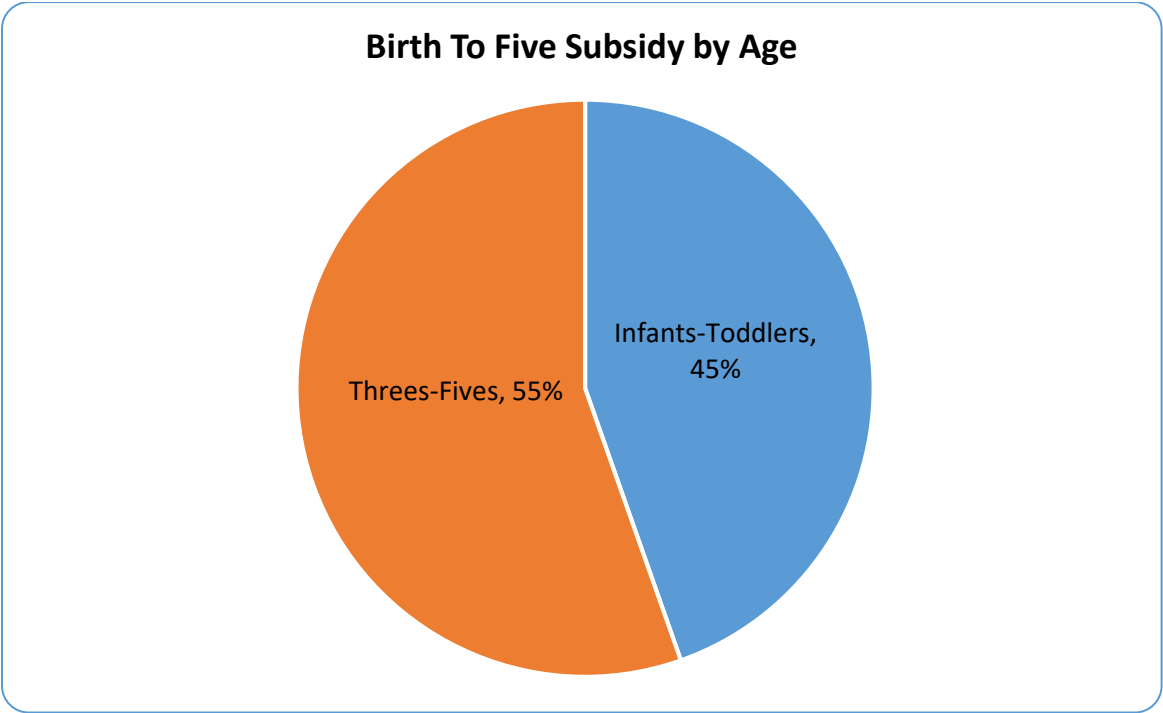
### 5-Star Enrollment Trends in Buncombe County Programs



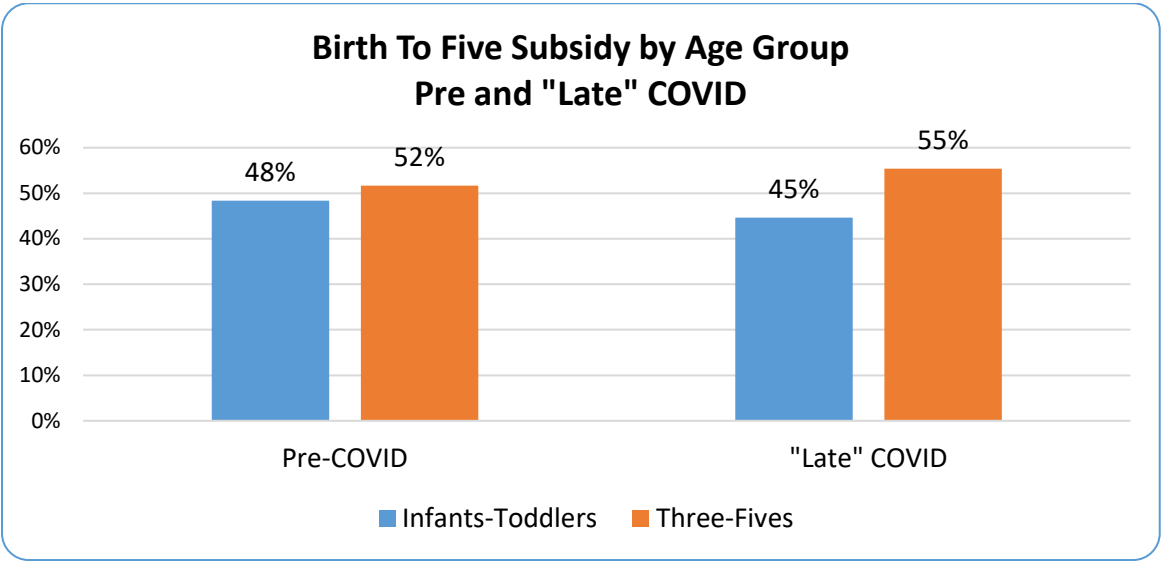
Source: DCDEE licensing data, 3/20; WorkLife Systems data, 2/21; WorkLife Systems data 10/21.



# Child Care Subsidy



Source: DCDEE Subsidy data-NCFAST, October 2021.



Source: DCDEE Subsidy data-NCFAST, October 2021; February 2020.

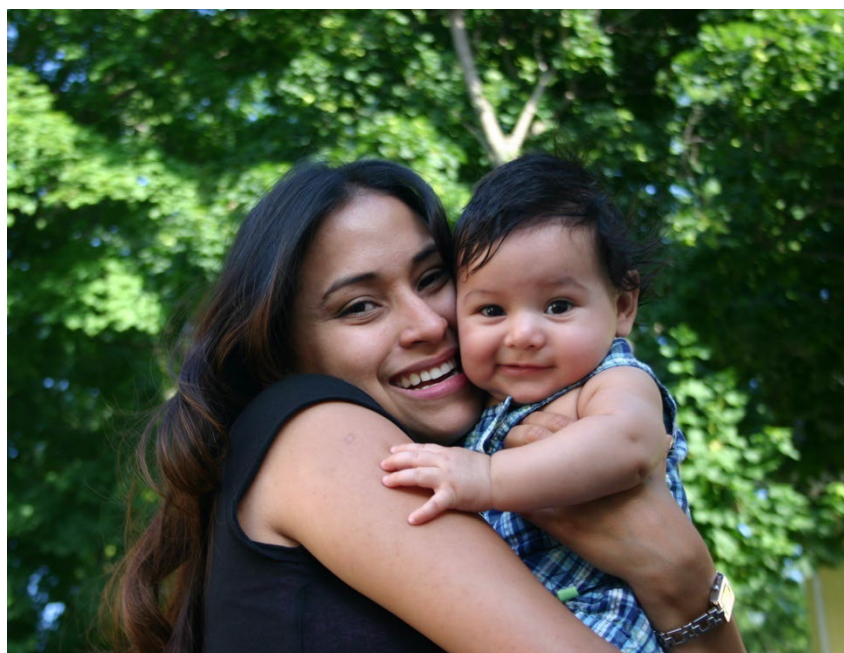
| Infants-Toddlers Receiving Subsidy by Star Level                                                                                                                                                                                                                                          |               |             |              |             |                 |             |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|-------------|--------------|-------------|-----------------|-------------|
| License Level                                                                                                                                                                                                                                                                             | Statewide     |             | Suburban     |             | Buncombe County |             |
|                                                                                                                                                                                                                                                                                           | #             | %           | #            | %           | #               | %           |
| 5-Star Centers                                                                                                                                                                                                                                                                            | 4,757         | 43%         | 1,217        | 41%         | 171             | 54%         |
| 4-Star Centers                                                                                                                                                                                                                                                                            | 3,212         | 29%         | 959          | 32%         | 73              | 23%         |
| 3-Star Centers                                                                                                                                                                                                                                                                            | 2,167         | 20%         | 571          | 19%         | 66              | 21%         |
| 2-Star Centers                                                                                                                                                                                                                                                                            | 5             | 0%          | 0            | 0%          | 0               | 0%          |
| 1-Star Centers <sup>+</sup>                                                                                                                                                                                                                                                               | 11            | 0%          | 0            | 0%          | 0               | 0%          |
| GS-110 Centers                                                                                                                                                                                                                                                                            | 240           | 2%          | 58           | 2%          | 0               | 0%          |
| Other* Centers                                                                                                                                                                                                                                                                            | 565           | 5%          | 188          | 6%          | 5               | 2%          |
| <b>Total Centers</b>                                                                                                                                                                                                                                                                      | <b>10,957</b> | <b>100%</b> | <b>2,993</b> | <b>100%</b> | <b>315</b>      | <b>100%</b> |
| 5-Star Homes                                                                                                                                                                                                                                                                              | 154           | 20%         | 28           | 20%         | 0               | 0%          |
| 4-Star Homes                                                                                                                                                                                                                                                                              | 394           | 52%         | 60           | 44%         | 1               | 25%         |
| 3-Star Homes                                                                                                                                                                                                                                                                              | 186           | 25%         | 41           | 30%         | 3               | 75%         |
| 2-Star Homes                                                                                                                                                                                                                                                                              | 0             | 0%          | 0            | 0%          | 0               | 0%          |
| 1-Star Homes                                                                                                                                                                                                                                                                              | 0             | 0%          | 0            | 0%          | 0               | 0%          |
| Other* Homes                                                                                                                                                                                                                                                                              | 25            | 3%          | 8            | 6%          | 0               | 0%          |
| <b>Total Homes</b>                                                                                                                                                                                                                                                                        | <b>759</b>    | <b>100%</b> | <b>137</b>   | <b>100%</b> | <b>4</b>        | <b>100%</b> |
| <sup>+</sup> Ten infants-toddlers are receiving subsidy in out-of-state programs and are listed above at the 1-star center level.<br>* "Other" centers and homes include those with a temporary, provisional or probationary license.<br>Source: DCDEE Subsidy data-NCFast, October 2021. |               |             |              |             |                 |             |





## Program Characteristics

| Percentage of Programs That Have Training and/or Experience in Each Area |           |          |                 |
|--------------------------------------------------------------------------|-----------|----------|-----------------|
|                                                                          | Statewide | Suburban | Buncombe County |
| ADD/ADHD                                                                 | 36%       | 39%      | 13%             |
| Autism                                                                   | 31%       | 32%      | 13%             |
| Developmental Delay                                                      | 33%       | 37%      | 16%             |
| Emotional/Behavioral                                                     | 22%       | 26%      | 16%             |
| Cerebral Palsy                                                           | 10%       | 10%      | 5%              |
| Down Syndrome                                                            | 17%       | 20%      | 13%             |
| Hearing Impairment                                                       | 19%       | 21%      | 11%             |
| Visual Impairment                                                        | 15%       | 16%      | 8%              |
| Wheelchair/Mobility Impaired                                             | 20%       | 26%      | 11%             |
| Allergies                                                                | 31%       | 35%      | 24%             |
| Seizure/Epilepsy                                                         | 10%       | 13%      | 18%             |
| Administer Medications                                                   | 17%       | 16%      | 13%             |
| Care for Sick Children                                                   | 4%        | 2%       | 0%              |
| On-Site Nurse                                                            | 2%        | 2%       | 0%              |
| Source: WorkLife Systems, October 2021.                                  |           |          |                 |



## Thank You for Your Support

Data for this publication was gathered and analyzed by Child Care Services Association. The principal investigator was Mary Martin with contributions made by Allory Bors and Rachel Osborne. The study was based on the 2016 study also by Child Care Services Association, *Who's Caring for Our Babies Now?* and was greatly expanded.

CCSA appreciates the Child Care Resource and Referral agencies across the state as well as the North Carolina Division of Child Development and Early Education for supplying much of the data for this study. A special thanks to child care center directors and family child care providers who responded to survey requests and for those who attended focus groups. For all you do to care for and educate the youngest of our children, we are eternally grateful.

Funds for this study were provided by the NC Early Education Coalition, Think Babies™ NC Alliance.

For more information about this report, please contact the Research Department at Child Care Services Association at 919-967-3272 or [research@childcareservices.org](mailto:research@childcareservices.org).



Child Care Services Association  
[www.childcareservices.org](http://www.childcareservices.org)

Think Babies™ NC Alliance  
[www.ncearlyeducationcoalition.org/think-babies-nc](http://www.ncearlyeducationcoalition.org/think-babies-nc)







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