



2021-2022 Orange County Infant-Toddler Child Care Landscape Study

March 2022



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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. Totals may not equal one hundred percent due to rounding.



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Status of Young Children 	• 3,416 Number of infants, one and two year olds in the county.¹ • 2,477 Number of infants, one and two year olds with all parents working.^{1,2} • 783 Current number of infant-toddler spaces in licensed early care and education programs.³ • 26% Vacancy Rate.³
Cost of Child Care 	• \$1,200 Median monthly full-time cost for an infant.⁴ • \$1,300 Median monthly full-time cost for a one year old.⁴ • \$1,191 Median monthly full-time cost for a two year old.⁴ • 13% Programs that offer a sliding fee scale for parents.³ • 38% Programs that offer a multi-child discount for parents.³
Program Schedules 	• 41% Programs open at or before 7:00 am.³ • 32% Programs close at or after 6:00 pm.³ • 10.00 Median number of hours programs are open each weekday.³ • 3% Programs open on Saturdays.³ • 3% Programs open on Sundays.³
Workforce Salary/Education 	• \$13.00/hr Median starting wage for assistants in infant-toddler rooms.⁴ • \$14.75/hr Median starting wage for teachers in infant-toddler rooms.⁴ • 56% Programs that require assistants in infant-toddler rooms to have at least some formal education past high school.⁴ • 50% Programs that require teachers in infant-toddler rooms to have at least an associate degree.⁴
Program Services 	• 58% Programs that have bilingual staff available who work with infants-toddlers.⁴ • 8% Programs that offer transportation services to infants-toddlers.⁴ • 5% Programs that offer part time care for infants-toddlers.³

Footnotes:

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

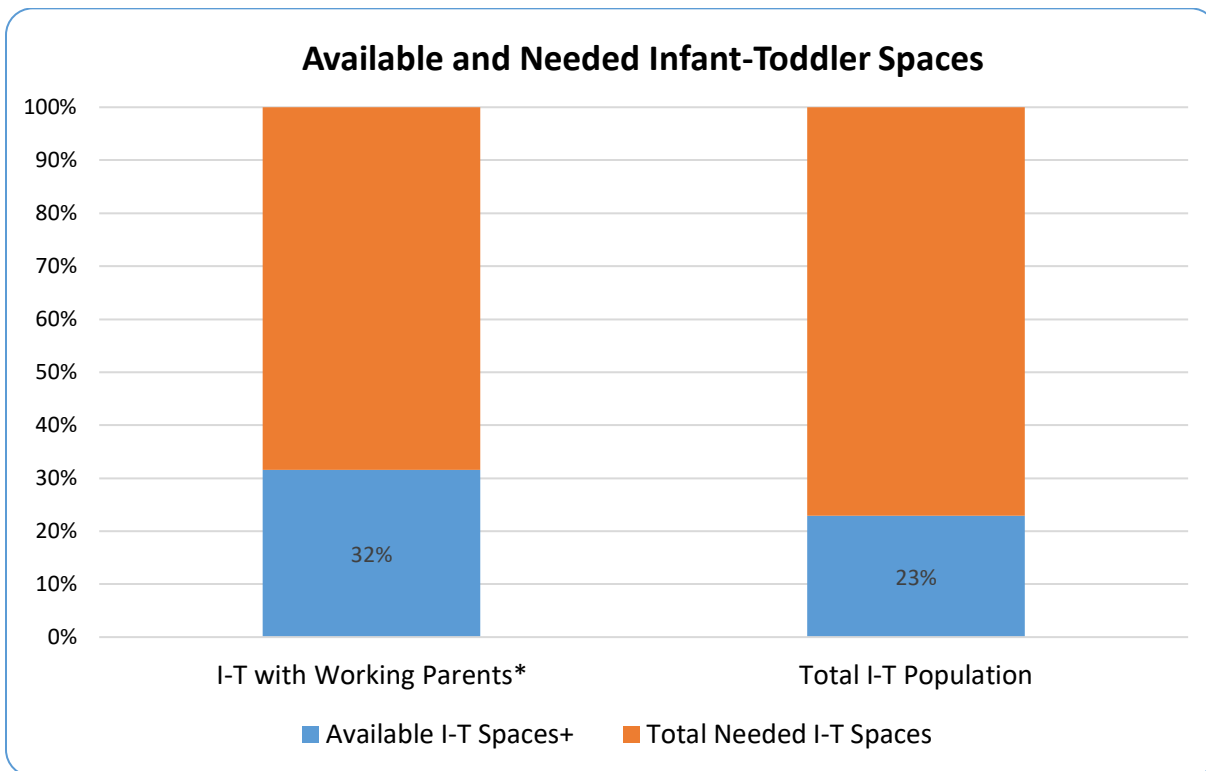
² U.S. Census, American Community Survey. Table B23008, 5-year estimate.

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

⁴ Child Care Services Association Survey to child care providers. December 2021-February 2022. 43% 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.



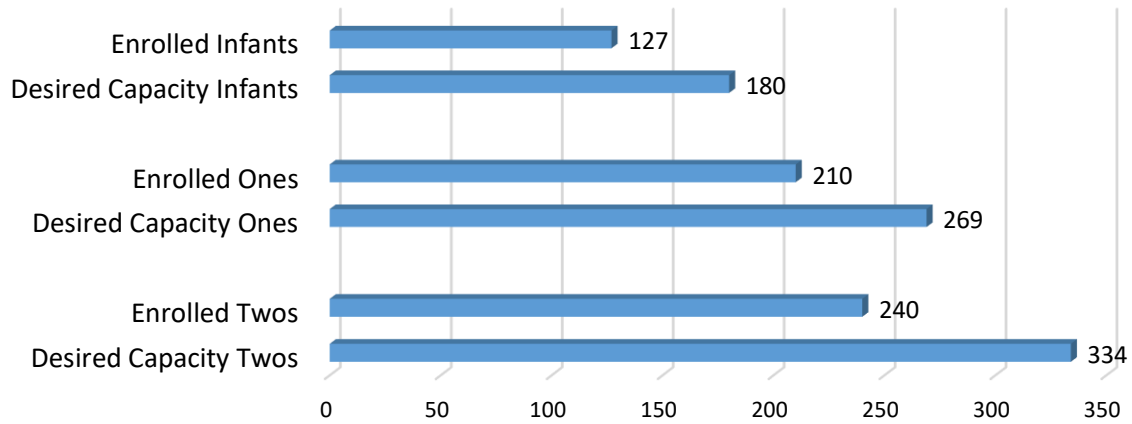
Programs and Enrollment

Number and Percent of Each Program Type Serving Infants and/or Toddlers by Star Rating						
License Level	Statewide Programs Serving Infants and/or Toddlers		Suburban Programs Serving Infants and/or Toddlers		Orange Programs Serving Infants and/or Toddlers	
	#	%	#	%	#	%
5-Star Centers	756	36%	179	32%	16	59%
4-Star Centers	567	27%	157	28%	5	19%
3-Star Centers	466	22%	115	21%	3	11%
2-Star Centers	4	0%	2	0%	0	0%
1-Star Centers	51	2%	12	2%	2	7%
GS-110 Centers	168	8%	55	10%	1	4%
Other* Centers	111	5%	33	6%	0	0%
Total Centers	2,123	100%	553	100%	27	100%
5-Star Homes	120	12%	31	13%	2	17%
4-Star Homes	401	40%	83	36%	6	50%
3-Star Homes	312	31%	72	31%	4	33%
2-Star Homes	71	7%	15	6%	0	0%
1-Star Homes	87	9%	21	9%	0	0%
Other* Homes	24	2%	9	4%	0	0%
Total Homes	1,015	100%	231	100%	12	100%
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. * "Other" centers and homes include those with a temporary, provisional or probationary license. Source: WorkLife Systems, October 2021.						

Infant-Toddler Enrollment by Program Type						
	Statewide		Suburban		Orange County	
	#	%	#	%	#	%
Centers	47,925	95%	13,432	96%	545	94%
Homes	2,348	5%	543	4%	32	6%
Source: WorkLife Systems, October 2021.						

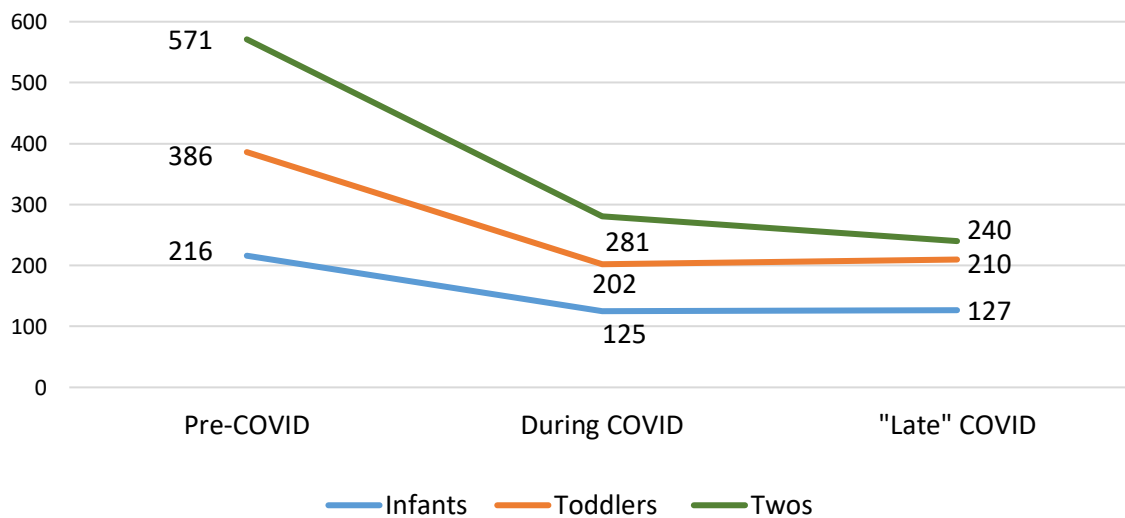


Desired Capacity vs. Enrollment By Age



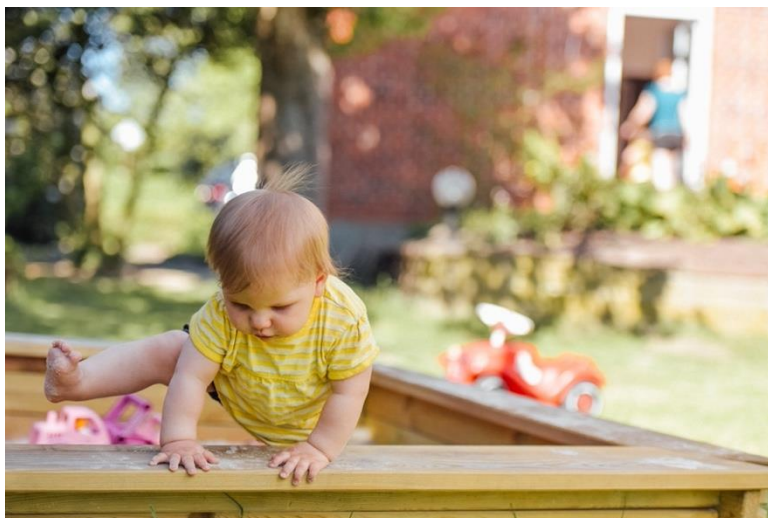
Source: WorkLife Systems, CCR&R data October 2021.

Enrollment Trends in Orange County Programs

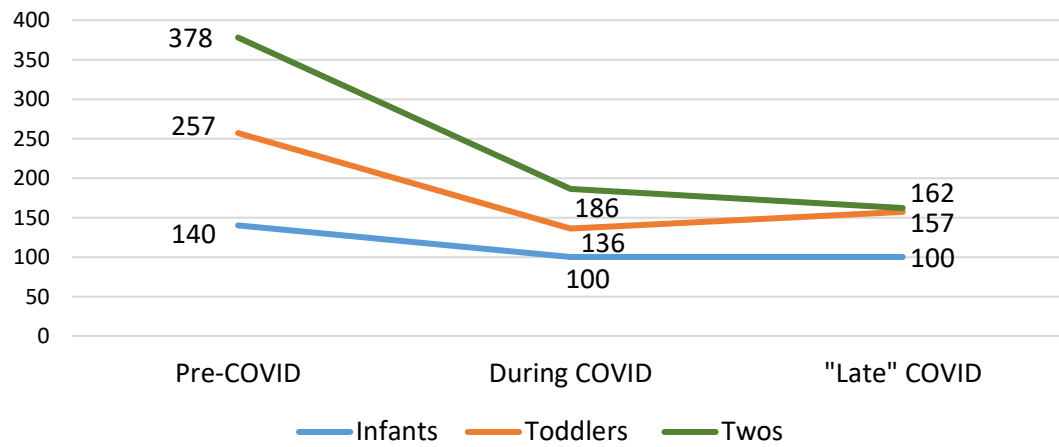


Source: DCDEE licensing data, 3/20; WorkLife Systems data, 2/21; WorkLife Systems data 10/21.

Infant-Toddler Enrollment Numbers and Percentages by Star Level						
License Level	Statewide Infant-Toddler Enrollment		Suburban Infant-Toddler Enrollment		Orange Infant-Toddler Enrollment	
	#	%	#	%	#	%
5-Star Centers	21,050	44%	5,232	39%	415	76%
4-Star Centers	10,752	22%	3,313	25%	59	11%
3-Star Centers	7,654	16%	2,081	15%	31	6%
2-Star Centers	85	0%	44	0%	0	0%
1-Star Centers	1,946	4%	409	3%	10	2%
GS-110 Centers	4,663	10%	1,772	13%	30	6%
Other* Centers	1,775	4%	581	4%	0	0%
Total Centers	47,925	100%	13,432	100%	545	100%
5-Star Homes	274	12%	78	14%	4	13%
4-Star Homes	932	40%	192	35%	15	47%
3-Star Homes	687	29%	171	31%	13	41%
2-Star Homes	190	8%	32	6%	0	0%
1-Star Homes	233	10%	55	10%	0	0%
Other* Homes	32	1%	15	3%	0	0%
Total Homes	2,348	100%	543	100%	32	100%
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. * "Other" centers and homes include those with a temporary, provisional or probationary license. Source: WorkLife Systems, October 2021.						



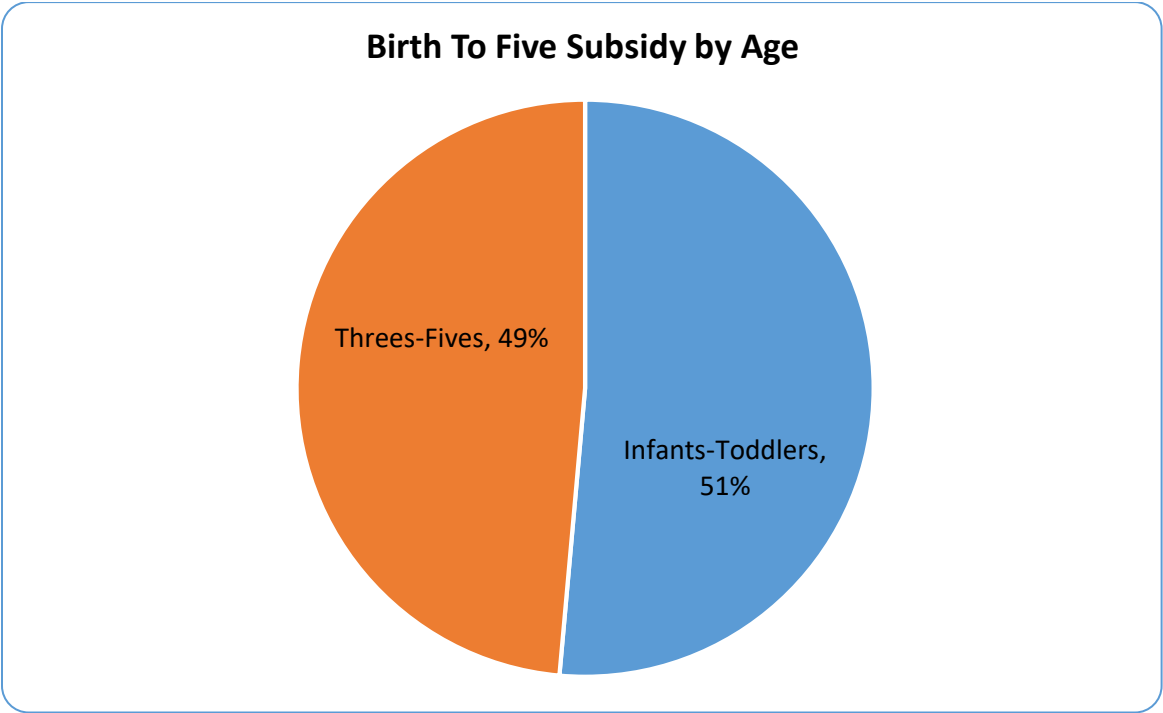
5-Star Enrollment Trends in Orange County Programs



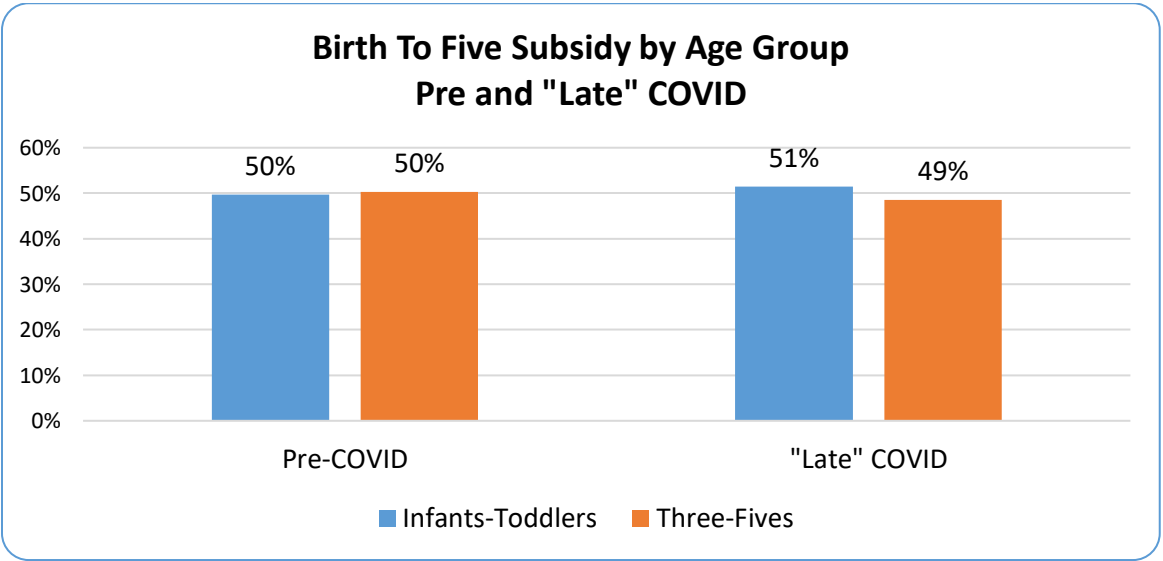
Source: DCDEE licensing data, 3/20; WorkLife Systems data, 2/21; WorkLife Systems data 10/21.



Child Care Subsidy



Source: DCDEE Subsidy data-NCFAST, October 2021.



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

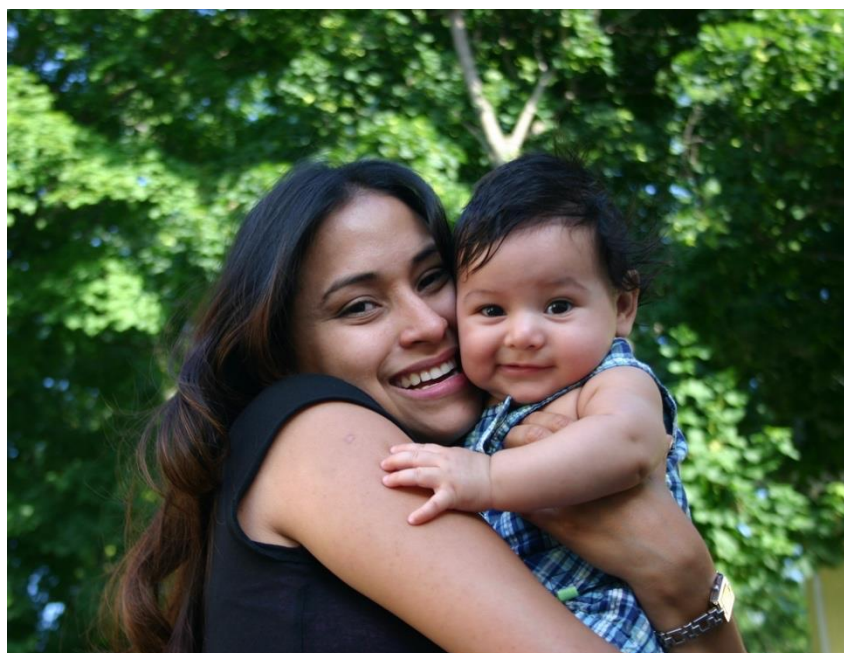
Infants-Toddlers Receiving Subsidy by Star Level						
License Level	Statewide		Suburban		Orange County	
	#	%	#	%	#	%
5-Star Centers	4,757	43%	1,217	41%	105	60%
4-Star Centers	3,212	29%	959	32%	45	26%
3-Star Centers	2,167	20%	571	19%	11	6%
2-Star Centers	5	0%	0	0%	0	0%
1-Star Centers ⁺	11	0%	0	0%	0	0%
GS-110 Centers	240	2%	58	2%	0	0%
Other* Centers	565	5%	188	6%	14	8%
Total Centers	10,957	100%	2,993	100%	175	100%
5-Star Homes	154	20%	28	20%	1	17%
4-Star Homes	394	52%	60	44%	1	17%
3-Star Homes	186	25%	41	30%	4	67%
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%
Total Homes	759	100%	137	100%	6	100%
⁺ Ten infants-toddlers are receiving subsidy in out-of-state programs and are listed above at the 1-star center level. * "Other" centers and homes include those with a temporary, provisional or probationary license. Source: DCDEE Subsidy data-NCFAST, October 2021.						



Program Characteristics

Percentage of Programs That Have Training and/or Experience in Each Area			
	Statewide	Suburban	Orange County
ADD/ADHD	36%	39%	21%
Autism	31%	32%	28%
Developmental Delay	33%	37%	28%
Emotional/Behavioral	22%	26%	28%
Cerebral Palsy	10%	10%	8%
Down Syndrome	17%	20%	15%
Hearing Impairment	19%	21%	15%
Visual Impairment	15%	16%	10%
Wheelchair/Mobility Impaired	20%	26%	3%
Allergies	31%	35%	3%
Seizure/Epilepsy	10%	13%	3%
Administer Medications	17%	16%	15%
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.

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



Child Care Services Association
www.childcareservices.org

Think Babies™ NC Alliance
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