



COLLEGE PARK CITY UNIVERSITY PARTNERSHIP



2014 CHILD CARE REPORT

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PREFACE

College Park City University Partnership (CPCUP), the nonprofit local development corporation jointly sponsored by the City of College Park and the University of Maryland, has benchmarked an education goal for 2020 to have a world-class education system that will attract and retain more College Park residents, including UMD staff, while preparing their children to be excellent students who will achieve in school, in college and beyond.

In Fall 2013, the Partnership launched one piece of the K-12 Education system: College Park Academy, which currently serves grades 6-8 – and is expanding every year to have it's premier graduating class in 2019. The next step is to help organize and assist interested parties in creating more options for child care and pre-kindergarten education for College Park families and UMD faculty and staff.

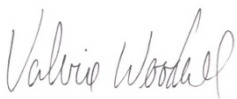
In order to inform the Partnership's education committee and other interested parties, the College Park City University Partnership has conducted research on family demographics of College Park and surrounding areas, what's currently offered in the local child care market and results from a survey conducted to acquire community feedback about what families need and want for their children's education. Our goal: open a child care/pre-k center, that is financially stable, functional and prestigious. This report includes all three areas of study, broken into three main categories.

Current demographics in College Park and surrounding areas. The main areas of focus is our primary market; what are the target zip codes; what is the current child population; how many families, including UMD faculty and staff, are in the area; what is the potential outlook for more children; how many child care options are there for parents, how many children are currently being served.

What is currently offered in the local child care market. The main questions we answer are what types of child care are available; what the rates, hours, holidays and closings policies are; what the capacity is; and what the capacity is for each age group; what is the demand (waitlist) for each particular provider; what licensing/accreditation does the provider have; what extra fees are associated with the provider; what are the expectations from parents, especially with the cooperative day care providers.

Results and analysis of CPCUP's community child care survey. The survey results and analysis focuses our attention on what the community en masse needs, what they are willing to pay and the type of program they'd prefer for their children. The questions we answer include how many people have children or plan to add children to their families in the next three years; what they currently use for child care and whether they plan to switch, what hours families need, the importance of cost, which child cares they have heard of and what they think about other child care centers, opinions about affiliation with UMD or College Park.

This report presents key findings and then presents these three pieces against each other so that the College Park City University Partnership's education committee, as well as other interested parties, can begin developing potential financial and program models.



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MASTER TABLE OF CONTENTS

Preface.....2

Table of contents.....3

Demographics.....4

Market analysis.....10

 In-home child care providers.....11

 Child care centers.....14

 Cooperatives.....28

Survey analysis.....31

 Overview.....32

 Table of Contents.....33

Conclusions.....60

DEMOGRAPHICS

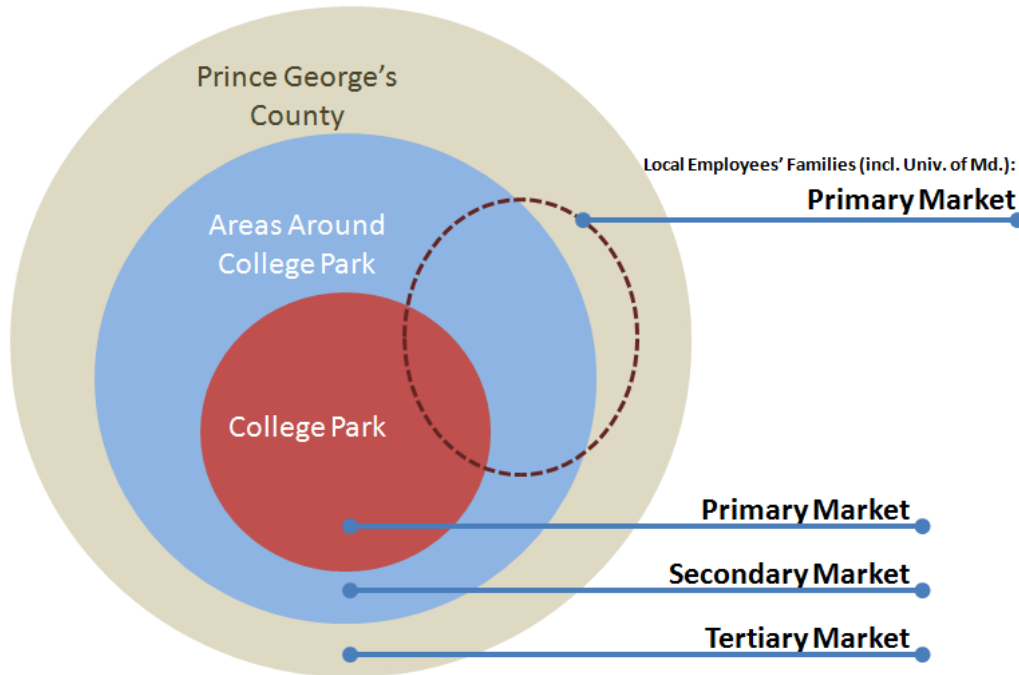
Market Sizing

The College Park City University Partnership conducted quantitative research in an effort to “size” the market for child care. The following data points have been researched using publicly available data.

Target communities and ZIP Codes

College Park, Berwyn Heights, University Park, Greenbelt, Hyattsville, Beltsville, Adelphi, Riverdale Park

20705, 20710, 20712, 20722, 20737, 20740, 20742, 20770, 20781, 20782, 20783, 20787



CENSUS DATA – Prince George’s County

Child Population – 2010

Age	Prince George's	Maryland
0-3 years	35,408	217,560
3-4 years	23,156	146,928
5 years	11,069	72,700
6-9 years	43,413	294,168
10-11 years	21,973	151,023
Total	135,019	882,379

Source: U.S. Bureau of the Census, 2010.

Male and Female Population – 2010

(selected ages)

Female	
Age Group	Prince George's
20-24	33,905
25-29	32,662
30-34	31,668
Total	98,235

Male	
Age Group	Prince George's
20-24	36,739
25-29	32,020
30-34	29,390
Total	98,149

Source: U.S. Bureau of the Census, 2010.

Fertility in Prince George’s County – 2012

Number of women 15 to 50 years old who had a birth in the past 12 months	12,746
Unmarried women (widowed, divorced, and never married)	6,371
Per 1,000 unmarried women	41
Per 1,000 women 15 to 50 years old	54
Per 1,000 women 15 to 19 years old	16
Per 1,000 women 20 to 34 years old	95
Per 1,000 women 35 to 50 years old	26

Source: U.S. Census Bureau, 2010-2012 American Community Survey

Families in Prince George’s County

	Total	Total # of all families with related children under age 6	Total # of all families with related children under age 18
2000	198,066	22,676	101,251
2010	203,520	25,752	109,697
Change	2.8%(+)	13.6%(+)	8.3%(+)

Source: U.S. Bureau of the Census, 2000, 2010. Prepared by MDP.

CENSUS DATA – Number Of Age-Appropriate Children in Target Areas

Target Geography	Total HHs	HHs w/Children Under 18	Children under 5 in 2010	Approximate ¹ number of children ages 0-5 in 2012
College Park	6,757	1,246	729	656
Total	6,757	1,246	729	656

Source: U.S. Census Bureau, 2010 Census.

¹Approximate numbers taken from 2012 Annual Community Survey.

Target Geography	Total HHs	HHs w/Children Under 18	Children under 5 in 2010	Approximate ¹ number of children ages 0-5 in 2012
Adelphi	5,011	1,764	1,211	490
Beltsville	5,494	2,069	1,208	1,107
Berwyn Heights	1,002	344	196	241
Hyattsville	6,324	2,101	1,297	1,376
Greenbelt	9,747	3,026	1,675	1,302
University Park	897	315	168	189
Riverdale Park	1,944	900	649	623
Total	30,419	10,519	6,404	5,328

Source: U.S. Census Bureau, 2010 Census.

¹Approximate numbers taken from 2012 Annual Community Survey.

Secondary market data does not include College Park

PRIMARY MARKET DATA – Number of Children Being Cared for in College Park

Children's programs by type with capacity/enrollment

	# of programs	capacity
Family Child Care providers (8 kids/provider)	16	128
*OCC Licensed Group Programs	16	128
8-12 Hour Child Care Centers	5	310
Infant/Toddler	3	150
Employer-Sponsored Centers	2	168
Before & After Care programs (school age)	3	174

Source: Prince George's County Child Care Resource Center

Note: not all 8-12 Hour Child Care centers are 5-days per week programs

Children in nursery school, preschool and kindergarten (7 schools total)	College Park, Maryland					
	Total		Percent of enrolled population			
			In public school		In private school	
	Estimate	Margin of Error	Estimate	Margin of Error	Estimate	Margin of Error
Nursery school, preschool	153	+/-88	8.5%	+/-16.9	91.5%	+/-16.9
Kindergarten	159	+/-115	81.1%	+/-25.3	18.9%	+/-25.3

Source: U.S. Census Bureau, 2010-2012 American Community Survey

SECONDARY MARKET DATA – Number of children being cared for in Prince George’s County

Children’s programs by type with capacity/enrollment

	# of programs	capacity
Family Child Care providers	955	7,377
*OCC Licensed Group Programs	402	23,748
8-12 Hour Child Care Centers	281	16,451
Infant/Toddler	138	1,404
Employer-Sponsored Centers	10	778

Source: Maryland Family Network, PG County Child care report 2014.

Prince George’s County Elementary Schools

	Public	Private
# of Elementary Schools	124	6

Enrollment

Pre-Kindergarten	5,602	1,585
Kindergarten	9,982	889

Source: MSDE, 2012-13 school year. Enrollment figures are for September 30, 2012. Private schools include MSDE approved schools and those operated by a tax-exempt religious organization which hold a letter of exemption from approval in accordance with State law

Total Number of child care providers in Prince George’s County

As of 2013, there were 1,236 child care providers in Prince George’s County – there were 955 family child care providers and 281 center-based full-day programs (8-12 hours) child care providers.

The Maryland Family Network, using the Multiple Regression Analysis and Forecasting template, predicts that the number of *center-based programs will increase by at least 2 programs per year* and the number of *family child care providers will decrease from 879 to about 632 in 2018*.

Source: Maryland Family Network/LOCATE: Child Care 7/13

Note: The predictions generated by the Model do not reflect the effects of current changes to social programs affecting child care.

NUMBER: University of Maryland regular and contractual employees living in Prince George’s County

Residential Location	Total
College Park	655
Areas Around College Park	965
The Rest of PG County	2917

Note: Total employee count—may or may not have age-appropriate children

Source: Connections Education Market Sizing Report, Michael Wilmeth 9/12, office of the Vice President of Administration and Finance at UMD.

SOURCES: DEMOGRAPHIC INFORMATION

Census Data/American Community Survey

<http://factfinder2.census.gov/faces/nav/jsf/pages/index.xhtml>

Maryland Family Network

<http://marylandfamilynetwork.org/>

Prince George's County Child Resource Center

http://www.childresource.org/programs_locate.php

Maryland Directory of Public Pre-Kindergartens

http://www.marylandpublicschools.org/MSDE/divisions/child_care/early_learning/docs/2013-2014PreKDirectory011714.pdf

MARKET ANALYSIS

WHAT IS CURRENTLY OFFERED

In order to gauge what is currently being offered in the market, the College Park City University Partnership conducted a series of interviews with local child care providers. The characteristics we sought to understand were capacity, cost, subsidies, hours of operation, accreditation and licensing, staff turnover, schedules, how charges vary by age and other factors like parent participation for example, any variations for different age groups, what co-operative child care providers expect from families.

We started with in-home or family child care providers. Then, we researched child care centers, including cooperatives. We did not investigate au pair programs, nanny services or nanny-shares.

IN-HOME CHILD CARE PROVIDERS

CPCUP focused on seven locations in close proximity to College Park, investigating what in-home family child care providers offer, what their prices are, what their hours of operation are. The locations researched in-depth were College Park (including Berwyn Heights), Riverdale Park, Beltsville, Greenbelt, Hyattsville, Adelphi and University Park.

The numbers in the chart below reflect in-home child care providers that are licensed and are part of the in-home child care provider network. It is possible that there are about twice as many in-home child care providers than are reflected in the chart below that are not licensed nor part of the network.

Prince George's County in-home family child care providers

Number Providing Services					Mean Weekly Cost of Care		
City	# of Providers	Infant	Pre-school	School-Age	Infants	Pre-school	B/A School
Adelphi	10	9	10	8	172.00	144.52	94
Beltsville	19	18	18	15	210.00	172.14	112.00
Bowie	96	88	94	83	205.03	166.77	104.22
COLLEGE PARK	16	16	16	16	210.00	172.00	94.00
Greenbelt	11	11	10	10	202.78	167.34	94.29
Hyattsville	53	51	51	49	171.83	144.52	92.86
Lanham	49	48	49	45	175.07	151.44	104.36
Laurel	59	55	56	48	204.93	160.27	110.00
Riverdale	13	13	13	9	181.00	144.63	93.00
Capitol Heights	53	50	52	47	171.78	142.99	96.94
Forestville	23	21	22	18	180.50	146.50	103.75
Landover	23	21	22	20	187.68	141.67	97.31
Mitchellville	25	22	24	21	193.21	165.44	85.83
Suitland	32	31	32	28	174.38	141.39	90.22
Upper Marlboro	120	104	115	101	186.25	156.94	104.17
Accokeek	13	13	13	10	189.44	161.81	106.25
Brandywine	13	11	12	11	199.00	165.00	106.00
Fort Washington	71	65	67	66	180.54	151.80	99.22
Oxon Hill	23	21	22	21	182.94	154.71	107.81
Temple Hills	50	46	49	41	169.51	139.12	91.11
University Park	14	12	14	14	200.00	180.00	94.00

Note: Shaded cells are the areas that were researched in-depth for the purposes of determining what is being offered in the area surrounding College Park.

In-home Child care providers are restricted to provide care for only 8 children per provider. Thus, in College Park with 16 providers, about 128 children can be served at a time.

Number of in-home child care providers around College Park. There are 126 in-home providers in close proximity to College Park. 121 offer infant care, 122 offer toddler to preschool care for those from ages two to four and 113 offer before- and after-care for school age children up to twelve years old.

Capacity. The total number of spaces for all children at in-home or family child care providers is eight children. According to the Prince George's County Child Resource Center, 90% of in-home child care providers offer 1-2 spaces for infants, 1-2 spaces for toddlers and 3-4 spaces for children in pre-school (ages 3-4) and 2-3 spaces for before and after care. This means that while in-home providers can offer infant care, only a few have spaces available on a regular basis.

Hours of operation. Of the 126 in-home child care providers in close proximity to College Park, 100% offer care between 6:00 a.m. and 6:00 p.m. Monday through Friday. Holidays and days closed vary by provider.

Maryland Family Networks LOCATE service, which helps match parents child care need to providers, received 8,581 for the entire state of Maryland. Of those requests, for the state of Maryland – 4% (367) requested care in the evening between 6:00 p.m. and 12:00 a.m. and .8% (74) requested care overnight, 12:00 a.m. to 6:00 a.m. According to the Prince George's County Resource Center, these numbers also represent the demand in this county.

But, these numbers, according to the Prince George's County Resource Center director, should be taken with a little bit of salt. These numbers don't match what could be the demand. People don't search for child care in the evening, not because they don't need it – but because it's not offered. Only 25% of all child care providers in Maryland, including centers, are licensed for overnight care – and of those that are licensed, 30% of them do not actually offer it.

In our interviews with in-home daycares, most don't provide evening care because 1) they only can work for 12 hours 2) because children should only be in childcare for 10 hours and 3) because families need childcare in the evening much more sporadically than in the day, so it's not financially sustainable for a provider.

Weekend care. No in-home child care provider in the immediate area around College Park offers weekend care. According to the LOCATE service tabulation, about 5% of parents searching for child care request weekend hours. This, again, might not fully reflect demand. It reflects what providers offer.

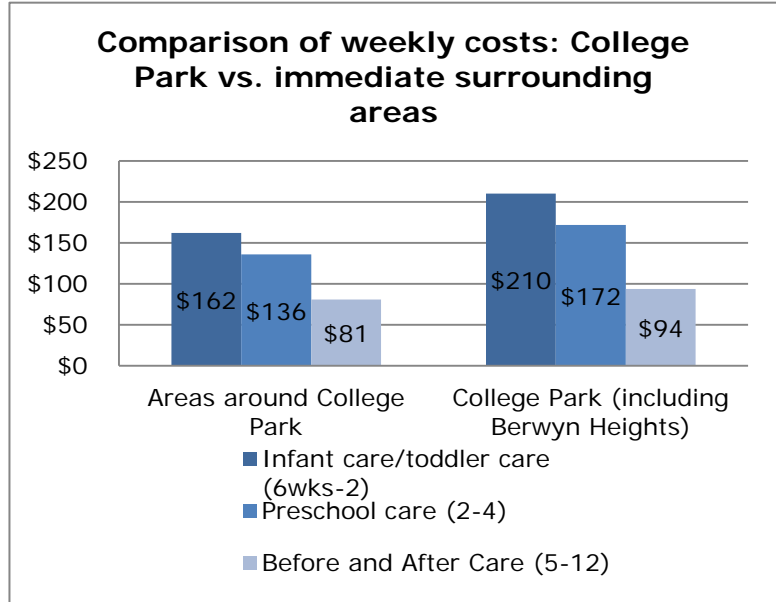
Before- and after-care. Of the 126 in-home child care providers in close proximity to College Park, 82% (104 of 126) offer before and after care services to children in school. The hours of operation for this program are from 6:00 a.m. to the start of school and from school end to 6:00 p.m. *In College Park 75% (12 of 16) in-home providers offer before- and after-care for school aged kids (5-12 years old).*

Drop-in or back-up care. While the maximum capacity for each provider is eight children, some providers end up with an open space for a day or a week, depending on family circumstances – illness, vacation, etc. – and will accept families on a drop-in or back-up basis. That family would register with the child care provider in advance, if possible, but if not, most providers would take a child without prior registration.

Cost. The cost for in-home child care varies by provider. Within our research area for in-home daycares, we found that the providers in College Park charged 22% more than the areas around College Park for infant care, 20% more for toddler-preschool care and 13% more for before and after care.

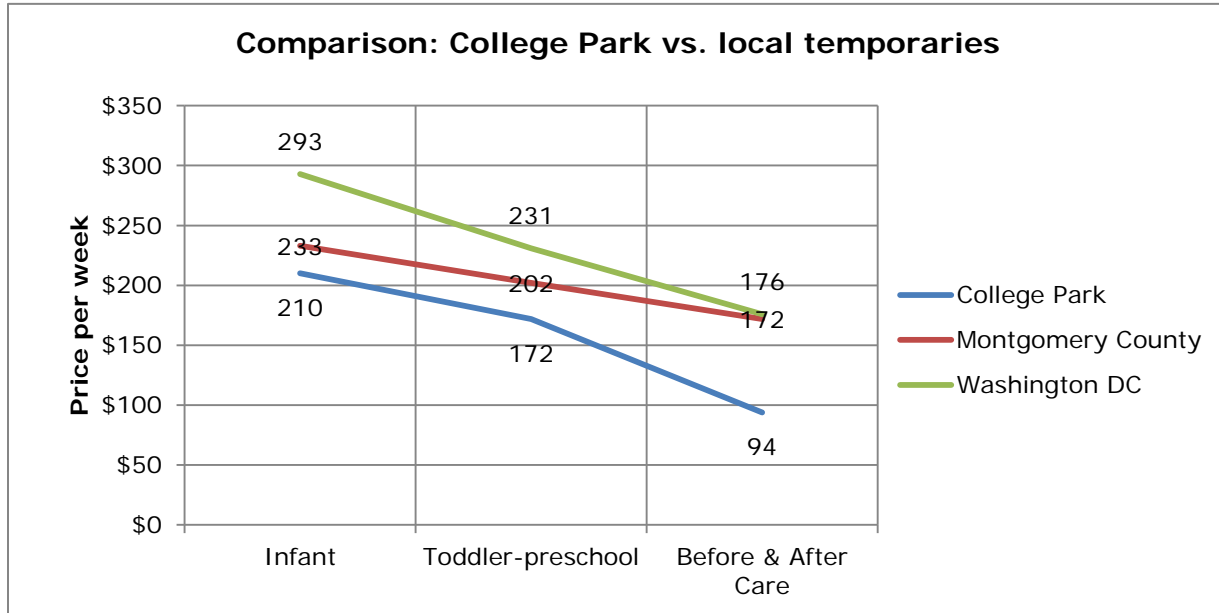
But, the cost for College Park in-home child care, for all ages, pales in comparison to the area surrounding College Park, outside of Prince George's County.

There is a 33% difference between College Park and Washington D.C. and a 23% difference between Montgomery County and College Park.



Source: Maryland Family Network, 2013 Montgomery County Child Care Report; Washington D.C. report on Child Care, 2013; Prince George's County Child Resource Center.

This chart also indicates what we found to be true throughout all of our research: infant care is the most expensive – the price drops about 20% when children enter the toddler to preschool phase.



Staff. According to the Prince George's County Resource Center, 95% of in-home daycare staff consists of the home owner. 45% of in-home day cares hire an additional staff person that comes in daily.

In order to be licensed through the Maryland State Department of Education's Office of Child Care, each in-home daycare must adhere to the child ratios set by the Office – which is one

adult per eight children (1:8), but with no more than two children under the age of two at one time.

Providers must be 20 years of age and have a high school diploma or equivalent – or successful completion of courses for credit from an accredited college or university. If they are 19 years old, they must have an AA degree in early childhood education or recreation. All staff will need to complete a minimum of twenty-four clock hours of approved training or CDA.

All staff must complete CPA, SIDS and First Aid training, be fingerprinted and undergo a background check.

According to Maryland Family Network’s 2013 Statewide Survey of Family Child Care providers, in-home child care providers in Prince George’s County have an annual salary of \$31,388.

Curriculum and Activities. Most in-home daycares, according to the Resource Center, provide a flexible, play-based and age appropriate curriculum

CHILD CARE CENTERS

CPCUP focused on seven locations in close proximity to College Park, interviewing a total of thirty-nine child care centers. The locations researched in-depth were College Park (including Berwyn Heights), Riverdale Park, Beltsville, Greenbelt, Hyattsville, Adelphi and University Park. The numbers in the chart below reflect child care centers in Prince George’s County in total.

Centers were selected based upon location. We selected and interviewed all of the centers in College Park and searched for centers in the target areas in order to review the best sample possible of what is offered in the area.

Twelve centers were neither in College Park nor in Prince George’s County. We researched these child care centers because they were referred to us by the child care survey CPCUP conducted in May 2014 as providers that had a good reputation (*see survey analysis section*).

The number of centers in College Park: 10.

The number of centers selected and interviewed in target areas around College Park: 17.

The number of centers referred to us but not in College Park or Prince George’s County: 12.

Supply of Child Care Centers for Prince George’s County

Number Providing Services to					Mean Weekly Cost of Care		
City	# of Providers	Infant	Pre-school	School-Age	Infants	Pre-school	B/A School
Adelphi	4	2	3	1	\$216.67	\$151.25	\$75.00
Beltsville	9	5	9	7	269.42	188.89	122.50
Bowie	30	13	25	22	247.92	190.71	108.00
COLLEGE PARK	12 ¹	4	10	8	297.00	229.75	130.00
Greenbelt	5	1	5	4	273.00	182.63	110.00
Hyattsville	18	9	17	8	216.67	151.25	108.00
Lanham	12	7	12	9	269.20	193.03	119.63
Laurel	18	8	17	11	282.00	190.49	110.17

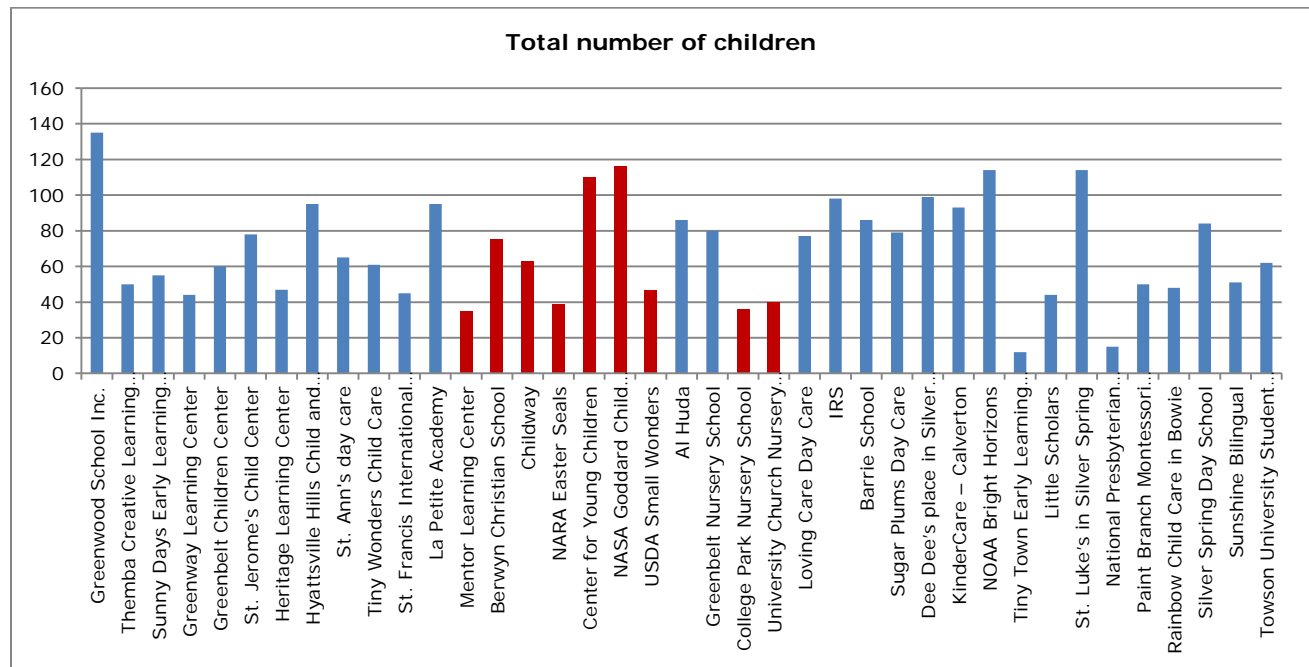
Riverdale	7	4	7	4	225.00	157.92	75.00
Capitol Heights	14	9	13	10	205.00	148.59	97.50
Forestville	7	3	7	7	176.25	135.00	96.00
Landover	17	8	17	13	176.67	155.07	111.25
Mitchellville	5	3	5	3	235.00	188.64	97.50
Suitland	9	5	9	8	266.67	169.05	113.75
Upper Marlboro	17	7	16	11	238.75	189.04	122.19
Accokeek	3	2	3	2	200.00	179.75	110.00
Brandywine	3	2	3	2	200.00	144.17	130.00
Clinton	15	8	15	13	190.83	162.92	108.50
Fort Washington	18	5	16	16	200.00	137.92	111.67
Oxon Hill	6	3	4	2	235.00	178.00	125.00
Temple Hills	17	7	15	16	208.00	141.08	98.33

NOTE: Only selected cities/communities in Prince George's County are represented. The number of providers caring for the different age groups does not equal the total number of providers in each city because some providers may care for more than one age group and/or complete information may not be available. "B/A School" is care provided before and/or after school.

Source: MFN/LOCATE: Child Care, 7/13.

CHILD CARE CENTER CAPACITY

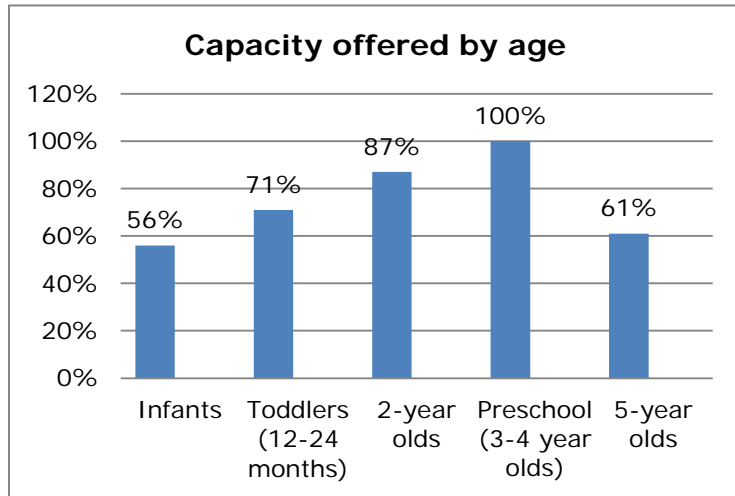
The average child care center capacity is seventy children – for cooperatives, the average capacity is fifty-two. The highest number of children in a center was 135 and the lowest was 12.



Through interviews with child care center directors, we determined that capacity is mainly determined by space availability and staffing ratios for all age groups.

Capacity for infant care. *56% of the centers we researched offer infant care. No cooperatives offer infant care.*

Most centers have either six or twelve infants – although a few deviate from this generality. The deciding factors: staff and space. If they have six infants, they have one classroom whereas if they have twelve, they have to have two since there is a group size maximum of six infants per group. For six infants, there needs to be two staff – one senior staff and either another teacher or an aide – in the room at all times in order to adhere to the one adult to three students ratio set by the Maryland State Department of Education’s Office of Child Care.



Capacity for toddler care (12-24 months). *71% of the centers we researched offer toddler care. No cooperatives offer toddler care.*

Most centers will either have nine or twelve toddlers. The deciding factors here too are staff and space. For toddlers, the staff to child ratio is the same as infants, but there can be up to nine kids per cohort. Also, there isn’t the need for cribs, and cots can be stored somewhere, freeing up some space in the room. This means that most of the time, there is one classroom devoted to toddlers. Like in the infant class, child care centers adhere to the ratio of one adult to three students set by the Maryland State Department of Education’s Office of Child Care.

Capacity for two year olds. Two year olds are a special group, mainly because they are not infants or toddlers, yet they are not quite ready for preschool either. They are also special because the staffing needs change – the staffing requirements set by MSDE’s Office of Child Care for two-year olds is one adult per six children (1:6) and there is a maximum of twelve children per group.

Most centers that offer two year old care will either have nine, twelve – and sometimes – twenty-four, although a few deviate from this generality. The deciding factors: staff and space.

87% of the centers we researched, including cooperatives, offer 2-year old care.

Capacity for preschool (3-4 year olds). Based on our research, interviews with educational professionals and for the purpose of this report, we’re defining 3-4 year old care as preschool. The difference between preschool and Pre-K is that preschool is for kids in the 3-4 age range, with no next step toward kindergarten whereas Pre-K is defined as older 4’s & 5 year olds, who then go to kindergarten the following year. 20% of the centers researched that had one or two Pre-K classes that started with older 4’s, but were mainly for 5 year olds. About 80% of the centers researched had a preschool, 3-4 year old class with no next step.

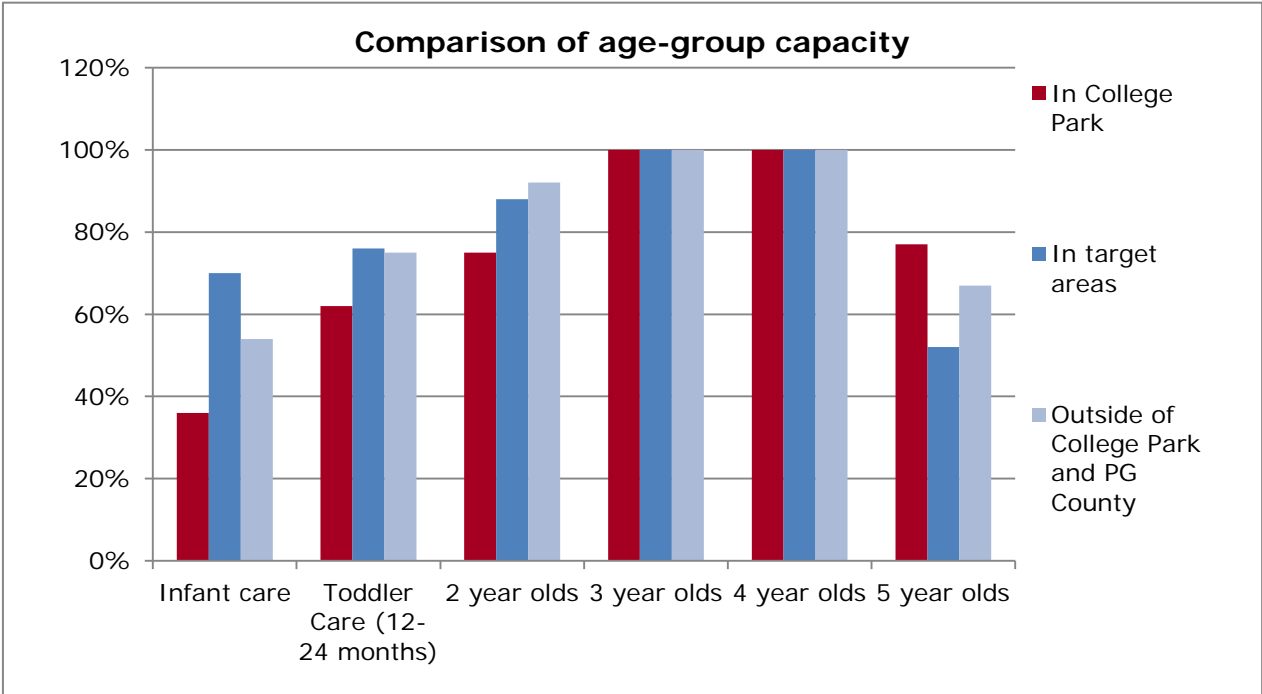
100% of child care centers researched offer preschool for 3-4 year olds, including the three cooperatives.

The Office of Child Care mandates that the maximum group size per center for 3-4 year olds is twenty children, and the staff to child ratio is one staff member per ten children (1:10). Given this information, and based on our research, most child care centers either have one room with about 20 children in it, or two rooms with about 15 children per room.

Capacity for 5 year olds (Pre-K). In researching child care centers, we found that most centers supply care for those ages two to four years old. Once children hit five years old they are being sent to either Pre-K or Kindergarten. As stated above, some centers offer Pre-K to older four year olds and younger five year olds.

61% percent of the centers researched offer 5-year old care.

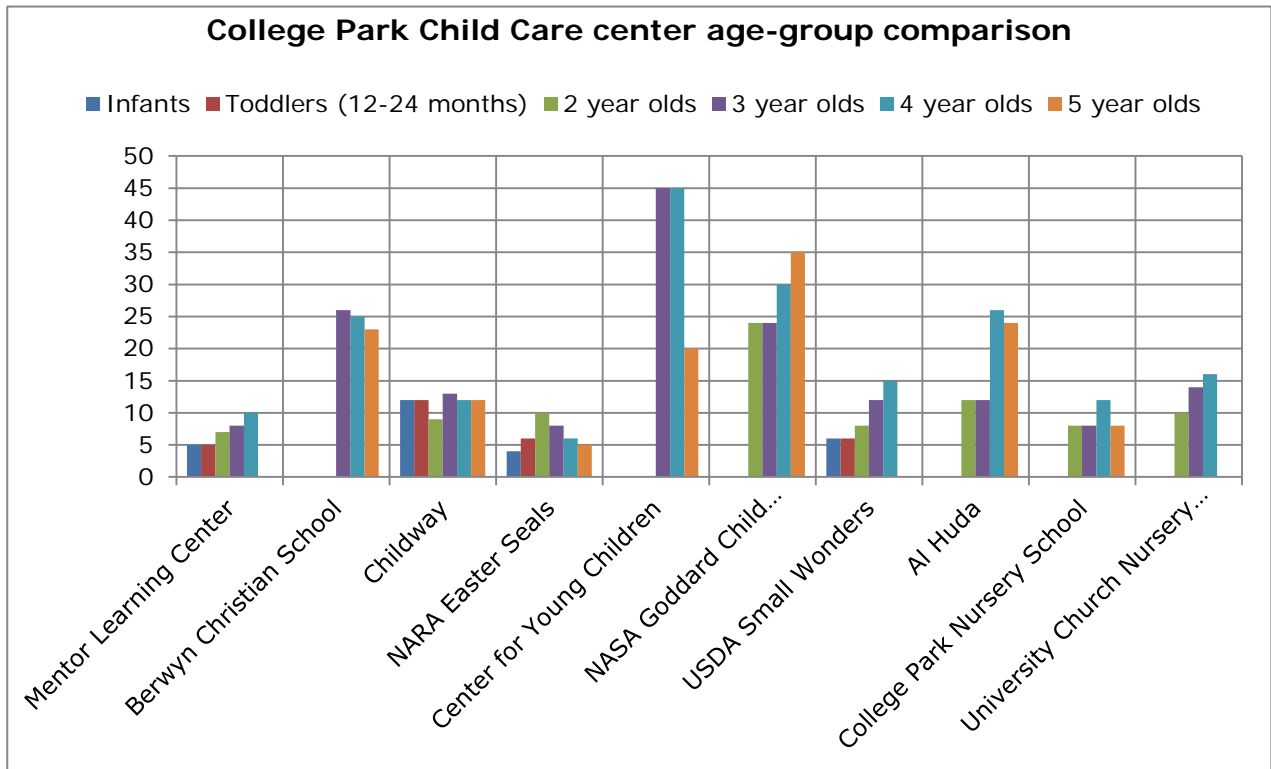
The variation from the areas around College Park and the centers referred to us are mainly based upon the fact that the centers that survey responders referred to us included more private schools that filtered from preschool into kindergarten and beyond, most up until high school.



IN COLLEGE PARK

- 36% of centers offer infant care. There are currently 27 infants being cared for in College Park. The average is 6 infants per center.
- 62% of child care centers offer toddler care. There are currently 41 toddlers being cared for. There is an average of 8 toddlers per center.
- 75% offer 2-year old care. There are 70 children being cared for in the 2-year old age group. The average number of students per center is 17.

- 100% of centers offer preschool (3-4 year old). There are 367 3-4 year olds that are being served. The average per center is 20 preschoolers.
- 77% of centers offer 5-year old care. . There are 127 students being cared for and the average for center-based 5-year old classes is 19, for cooperatives it is 8 students. In fact, there is only one cooperative in College Park that offers 5-year old care, the College Park Nursery School.



IN TARGET AREAS AROUND COLLEGE PARK

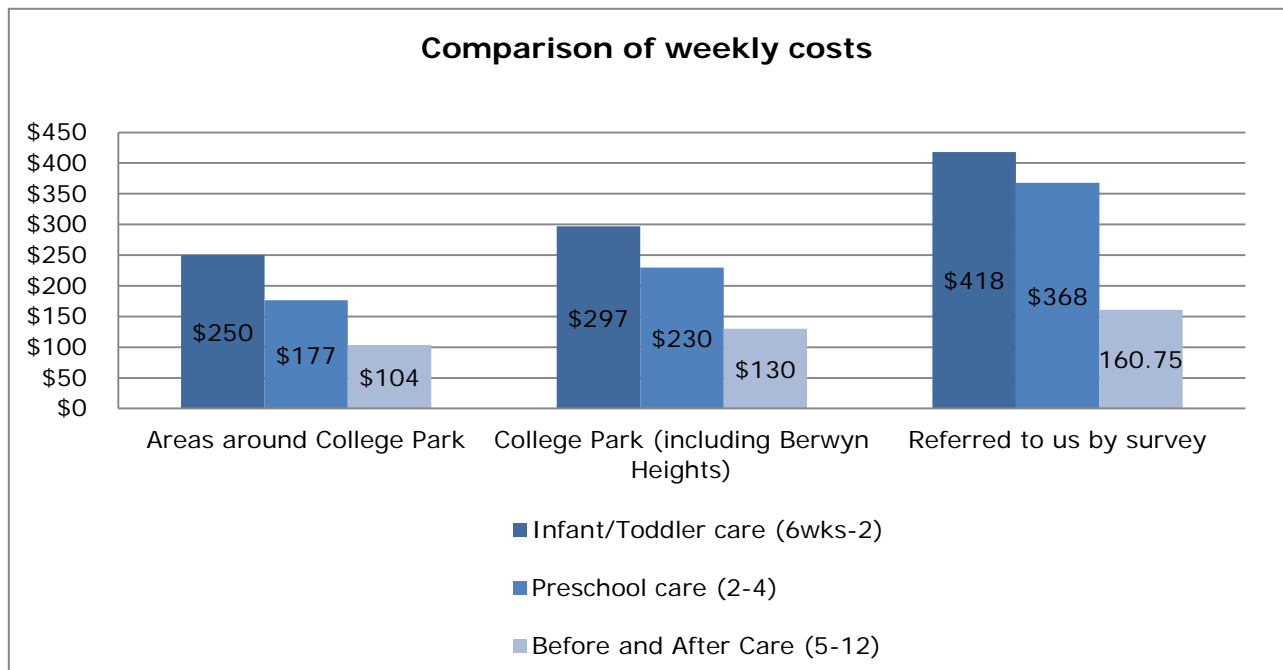
- 70% of centers offer infant care. There are currently 99 infants being cared for in the vicinity of College Park. The average here is 8 infants per center.
- 76% offer toddler care. There are currently 113 toddlers being cared for. The average is 9 toddlers per center.
- 88% offer 2-year old care. There are 208 children in 2-year old care, currently. The average is 13 2-year olds per center.
- 100% of centers offer preschool. There are 477 preschoolers are being cared for and the average is 16 per center.
- 52% offer child care for 5-year olds. There are 133 children being cared for and the average per center is 15 children.

IN CHILD CARE CENTERS REFERRED TO US BY THE CPCUP 2014 SURVEY

- 54% offer infant care. There are currently 33 infants being cared for. The average is 6 infants per center.
- 75% offer toddler care. There are currently 98 toddlers being cared for. The average is 11 toddlers per center.
- 92% offer 2-year old care. There are 150 2-year olds being cared for and the average is fourteen 2-year olds per center.
- 100% offer preschool. 417 preschoolers are served – the average is 18 3-4 year olds per center.
- 67% offer 5-year old care. There are 142 children being cared for and the average per center is 18.

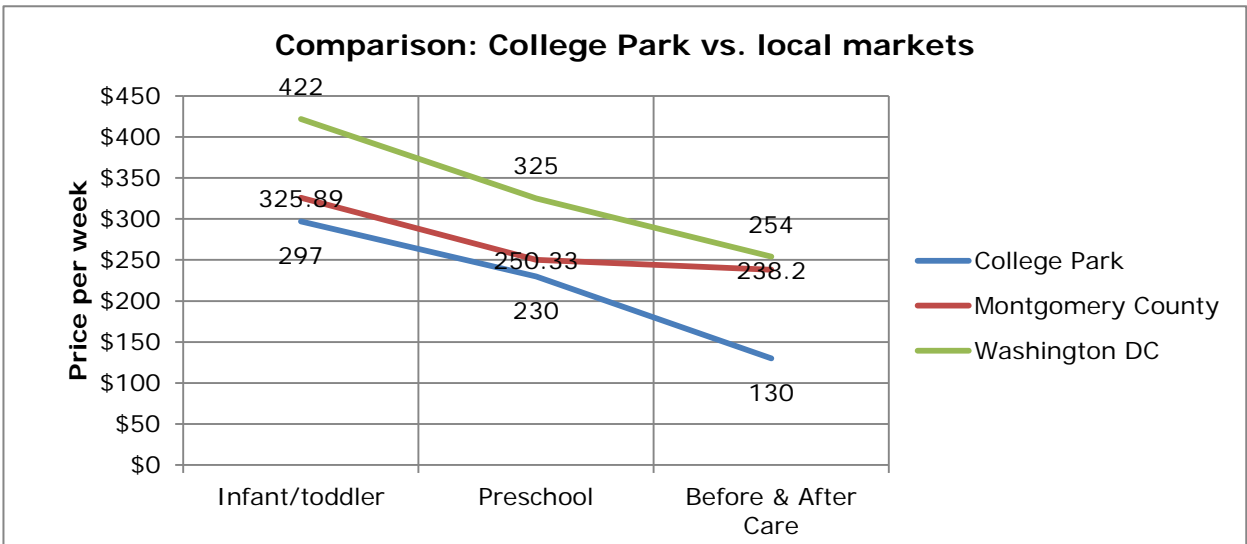
COST

The price range for child care centers vary by center. Our research determined that the centers in College Park charged 15% more than the areas around College Park for infant care, 23% more for toddler-preschool care and 20% more for before and after care.



But, as in the family child care sector, the cost for College Park child care centers, for all ages, pales in comparison to the area surrounding College Park, outside of Prince George's County.

Washington D.C. child care centers are 29% more expensive than College Park child care centers and Montgomery County child care centers are 8% more expensive for both infant and toddler-preschool care. When it comes to before and aftercare, College Park is 45% less expensive than both D.C. and Montgomery County child care centers.



As in family home care, infant care is the most expensive. The factors that go into why it's more expensive: staff and group requirements are more stringent, there's more equipment needed for infants (cribs, diaper changing table, high-chairs, refrigerators, walkers, etc.) and equipment costs for infants are higher.

In our research we found that IF a center drops their price for full-time hours from infants (6 weeks to 12 months) to toddlers (12-24 months), infant care was 10% more expensive than toddler care. Out of all the centers, there were five centers that dropped their price between infant care and toddler care.

The real drop in price starts at two years old. From infant and toddler care to two year old care, there is a 20% price reduction. This is due to a few things: staff and group ratios, equipment is not so expensive, and the equipment doesn't take up as much space. For example, older kids use cots for nap time, which can be stored in a closet, freeing up space in a room. 85% of centers dropped rates between infant/toddler care to two year old full-time care.

The price is then reduced by 10% between two years and preschool age for 83% of the centers that we researched.

There were two centers – both connected to an elementary/day school operation – that actually had the full-time price increase from two year old care to preschool care by an average of 5%. These two centers were referred to us by the survey as programs that people liked.

Cooperatives have an entirely different set up because they don't offer infant/toddler or two-year old care. ***(Please see cooperatives section.)***

Varying schedules within a child care center. The price does change based on the schedule. There are three centers that offer a three days per week schedule – one accepts infants. The price reduction from full-time to this schedule, for all age groups here is 29%.

There are five centers that offer a schedule of five mornings per week – one offers infant care on this schedule and the price is 32% less than the amount for a full day. For the other age groups, the price for five mornings per week versus full-time it is 26% less than full-time care.

There are three centers that offer a schedule of three mornings per week and the price drop, for all ages, is 46%

Extra fees. According to our conversations with child care center directors, child care centers are expensive to run – the number one way, outside of tuition and fundraising, for a center to cover its costs is through extra fees. There are a lot of variations on fees, for example, 99% of centers have a late fee, but there is no real consistency in pricing or enforcement. The table below informs us of a list of the main fees that providers charge outside of tuition.

Type of Fee	% of Child Care Centers	In College Park	In Target Areas	Referred to us by survey
Application	100%	\$30-\$100 \$54 avg	\$35-\$150 \$68 avg	\$35-\$150 \$79 avg
Registration ¹	38%	50% \$50-\$100 \$50 avg	35% \$35-\$300 \$107 avg	33% \$100-\$500 \$206 avg
Waitlist	15%	5% \$50	5% \$75 avg	33% \$50-\$100 \$75avg
Activities ²	61%	50%	76%	41%
Late fee ³	74%	60%	82%	83%
Meals	70%	74% \$2-3/day	70% \$2-3/day	68% \$2-3/day

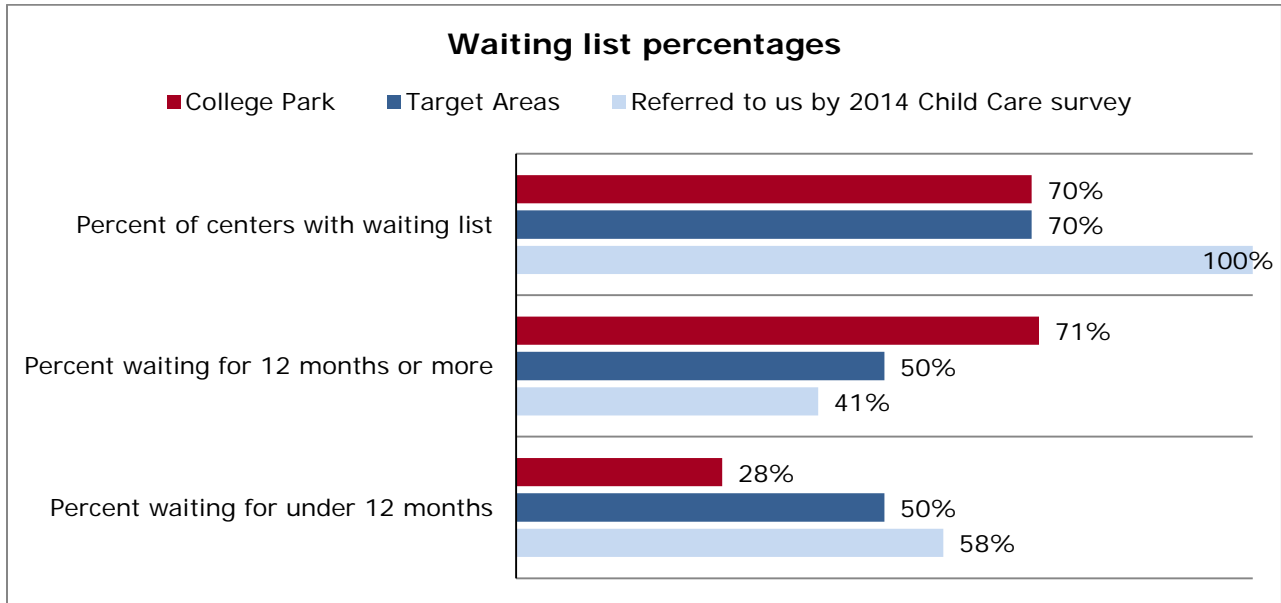
1. About 15% of child care centers have an annual registration fee. And 10% require a deposit to enroll.
2. Fees not listed here because about 70% of those who offer activities outside of curricula have activity fees that run based on the cost of the program – with say a 10% overhead fee.
3. Late fees vary A LOT. Some charge \$5 per minute, others charge \$15 per minute after the first 15 minutes, some don't charge you the first time, but charge you if you're late twice, some charge \$10. . . and on and on. **Bottom line: there are late fees at almost every center.**

Other fees that centers charge families include what we can call a “not following center rules fee” – things like not notifying the center about absences by a certain time, not signing the child in or out of care, a returned check fee. There is one center that has an association dues fee of \$100 and an insurance fee of \$14.05. There are three centers that have a technology fee of \$35. There is one center that has a cleaning fee of \$50/semester.

WAITLISTS AND PRIORITY SYSTEMS

Waitlists. We asked each child care center about their waitlists. The main questions were about whether or not the center had a waitlist, how long the waitlist was, how each center manages its waitlist – how quickly kids move through the system.

79% of centers have a wait list.



The number of people waiting did not always comport with the length of time people have been waiting. For example, NARA Easter Seals have 14 infants on their wait list, and those people have been waiting for over 8 months to get in – maybe 1-2 will get in this summer, while the rest will continue to wait but at Greenbelt Children Center, there are 3-4 kids on their list and those children will have to wait for at least 9 months.

The reason: the line to enroll a new child is based on capacity at each age-group level and this affects how long parents wait.

Which age-groups have the longest waits? Infants and toddlers have the longest waits, followed by 2-year olds given the capacity issues of staffing and space – but the other issue is which families get priority.

Priority systems. The centers with the highest wait lists are the centers with priority systems. 62% of centers we researched are subsidized by the federal government, religious institutions or Universities and thus give priority to their groups:

- **Federal government** child cares give priority to employees, other federal employees, federal contractors, siblings and then general public.
- **Universities** give priority for faculty, staff, students, siblings, general public.
- **Religious institutions** give priority to members/parishioners, siblings, general public.

71% of centers give priority to siblings.

SCHOOL YEAR AND HOURS OF OPERATION

School year. Child care centers operate either twelve months per year (full-year) or they have a school-year that's generally from late August/Early September to Late May/Early June, similar to Maryland Public Schools.

41 percent of the child care centers we researched are open from late August/Early September to Late May/Early June. 87% of the centers with a "school year" offer camp in the summer months when they are closed.

59% of the child care centers we researched are open full-year. The Themba Learning Center is the only Child Care facility open all year that offers a summer camp.

Hours of operation. In our research we found that zero centers offering weekend care, or non-traditional hours. 100% percent of childcare providers are open Monday through Friday. Cooperatives run programs two or three days per week, but are open throughout the week. (See cooperatives section below.)

25% open between 6:00 a.m. and 6:30 a.m.
46% open between 7:00 a.m. and 7:30 a.m.
25% open after 8:00 a.m.

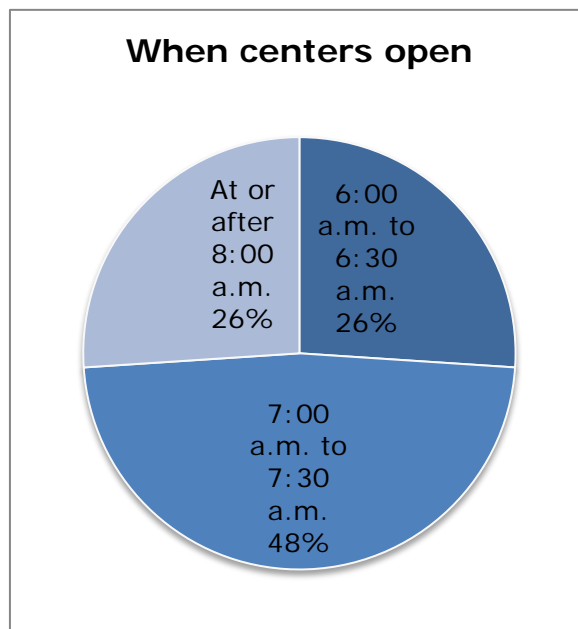
84% of centers close between 5:30 p.m. and 6:30 p.m. – no matter what time they open. The rest (6) close earlier – two of them are cooperatives and operate on a half-day basis. Four are Preschool/Pre-K only and three offer an after-care option until 5:30 p.m. or 6:00 p.m.

There isn't one center, that we could find, that operates past 6:30 p.m.

Days closed. 95% follow a federal holiday (5% follow a Federal Holiday schedule along with the institutions holiday schedule) and close at various points throughout the year for teacher training days/center clean-up days, usually for 1-2 days per quarter. However, this depends on the year and the number of days closed is reserved for the discretion of the center director.

Inclement weather policies. Most centers that we researched followed County school closing and delays based the centers location (which county they are in). However, the centers aligned with the Federal Government, first followed the Federal Government then had discretion to follow the county's schedule. One center, Greenway Learning Center, was based on the University of Maryland's closing and delays.

So for example, if the federal government closed but the county did not, the child care center would close. If the federal government was open and the county was closed, the child care center would open. If the federal government was on telework, it is the directors' discretion to close based on the county's ruling.



CENTER ACCREDITATION

Accreditation. All center-based providers must comply with Maryland State Department of Education rules and regulations and be licensed operators through the Office of Child Care.

Of the centers we research 35% are accredited by NAEYC, the National Association for the Education of Young Children. 17% are accredited through MSDE's Early Childhood Accreditation. 46% are only licensed through MSDE – one is working for NAEYC accreditation and two are accredited with the Archdiocese of Washington. 3% are accredited through AMS, the American Montessori Society and AIMS, the Association of Independent Maryland & DC Schools, and NAC, the National Accreditation Commission for Early Care and Education Programs

LOCATION	LICENSE ONLY	NAEYC	MSDE	OTHER
College Park	30%	50%	40%	0%
Target Areas	35%	41%	17%	17%
Referred by survey	58%	16%	1%	25%

*Note: Other accreditation includes AIMS, AMS, NAC
Numbers don't add up because some centers have dual accreditation*

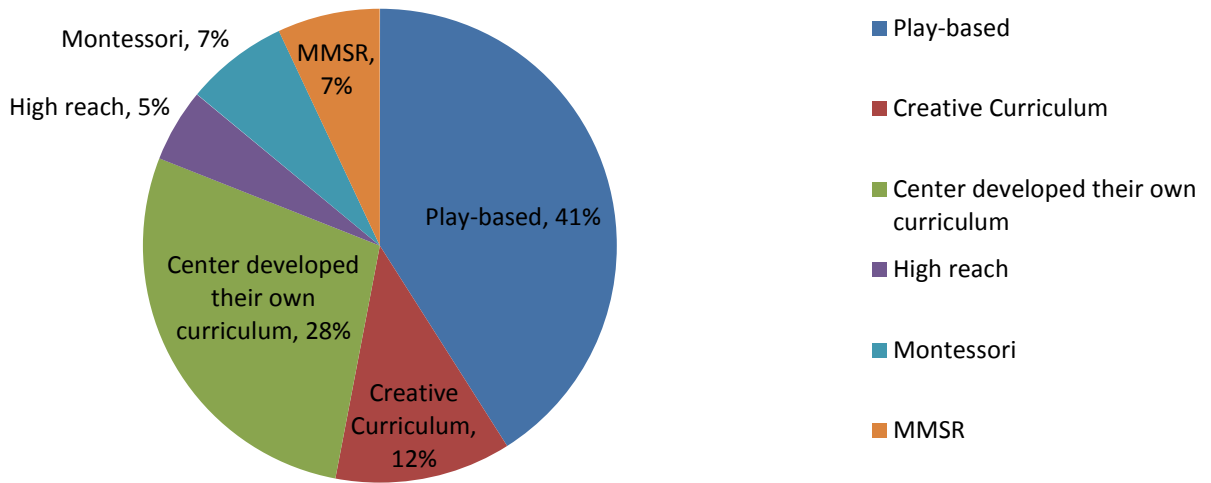
Student assessment. If a center is accredited they must provide formal and informal assessments of the children they provide care for – it's a requirement for accreditation by NAEYC, AIMS, AMS and MSDE. For those centers that are licensed only, 95 percent of them produce informal assessments for parents. 57 percent are done on a quarterly basis, 37 percent are done on a non-regular schedule.

CURRICULUM

There are many different types of programs and thus, many different sets of curricula. In our research we learned what each curriculum is and interviewed each child care to find out what is offered. One interesting fact we found immediately is that while accreditation influences curriculum to some extent, accreditation is mainly a guide for the aspects of child care that the curriculum must adhere to. For example if you have two NAEYC accredited child care centers, one child care center might be play-based, whereas the other might use creative curriculum. The main difference between play-based and creative curriculum is in the leadership – who is choosing the activities; how is the learning connection being made. But both can reach the benchmarks set by NAEYC standards to assist children in development within their model.

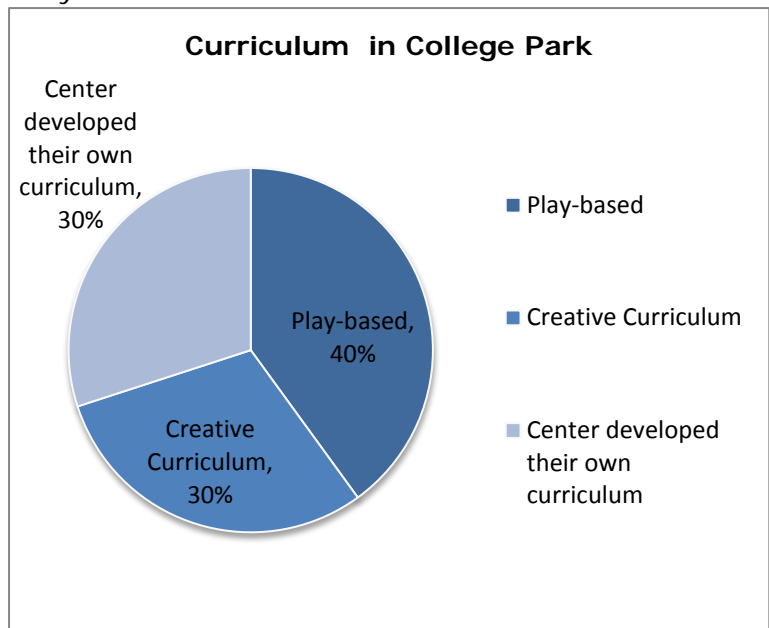
In our research, we found that there was a variety of program options, but we did not find one center that had more than one curricula for their group. Twenty-eight percent of centers create their own curriculum. Sixty percent of the ones that have their own curricula are for-profit, national child care providers, centers like Bright Horizons or KinderCare. There are four centers that have their own curricula that are not corporate: Center for Young Children, St. Luke's, Berwyn Christian School and the National Presbyterian School. Three of these are religious institutions.

Curriculum in child care centers



Play-Based. The term “play-based” is often interchanged with “child-centered,” which could be used to describe the majority of available preschool programs. The play-based classroom is broken up into sections, such as a home or kitchen, science area, water table, reading nook, space with blocks and other toys, or other areas. Teachers encourage the kids to play, facilitating social skills along the way.

Creative Curriculum. The Creative Curriculum balances both teacher-directed and child-initiated learning, with an emphasis on responding to children’s learning styles and building on their strengths and interests. This curricula applies the latest theory and research on best practices in teaching and learning and the content standards developed by states and professional organizations. While keeping the original environmentally-based approach it clearly defines the teacher’s vital role in connecting content, teaching, and learning for preschool children. It features goals and objectives linked directly to our valid and reliable assessment instrument.

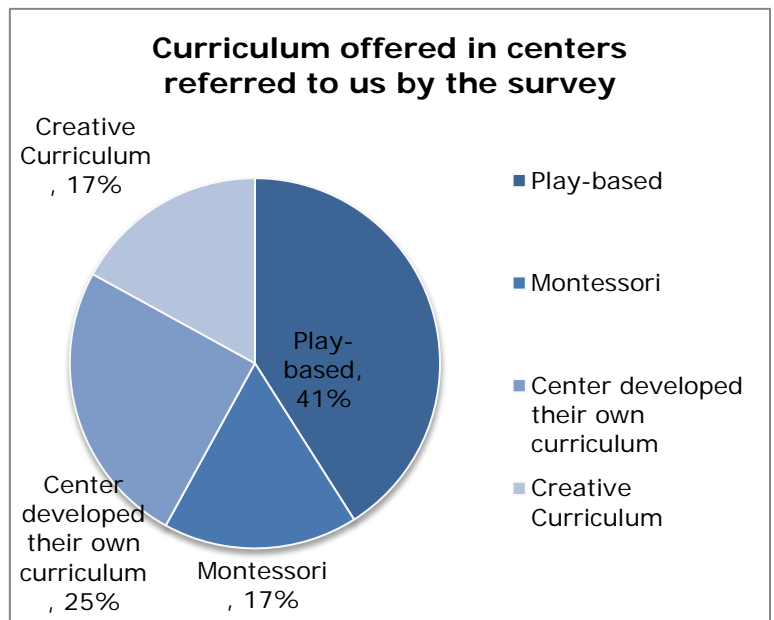
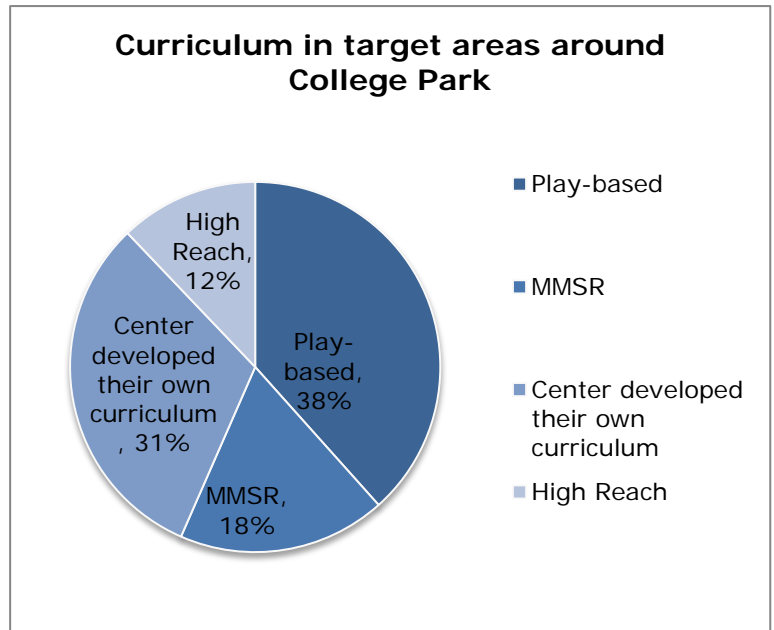


High Reach. The High Reach Learning Curriculum is designed to promote a “creative, integrated, hands-on learning experience for the whole child.” The materials are thematic in nature and provide an array of developmentally appropriate activities that incorporate a balance between teacher-facilitated instruction and child-initiated activities.

Montessori. A child-centered method of teaching, originated by Italian educator Maria Montessori. Although popular at all levels of education, now it is most associated with preschool and elementary school. Children are encouraged by their teachers or "guides" to choose their own activities and self-direct their own discovery and interaction. Montessori curriculum focuses on five areas: practical life, sensory awareness education, language arts, mathematics and geometry and cultural subjects.

MMSR/MSDE Approved. The Maryland State Department of Education (MSDE) defines "school readiness" as the stage of human development that enables a child to engage in, and benefit from, early learning experiences. As a result of family support and relationships with friends and members of the community, a young child reaches certain levels of physical well-being and motor development, acquired social and personal capabilities, and attained language and comprehension skills coupled with general knowledge. School readiness acknowledges individual approaches toward learning as well as the unique experiences and background of each child that help children enter school ready to learn.

KEY TAKEAWAY: *Play-Based curriculum is the most used curriculum for child care centers, followed by Creative Curriculum and centers that have trademarked curricula.*



PERSONNEL

For each center we explored staffing and salaries. All centers that are licensed must adhere to staff licensing rules.

Staff. In our interviews we learned that the number of staff employed by a center is generally based upon enrollment and state regulation. However, we also found that just under 73 percent of centers actually employed 40 percent more than the number of people the state requires. Reason: some centers employed two part-time teachers instead of one full-time teacher.

Cooperatives usually adhered to the minimum required by the state because parents pitched in as “aides”.

Child care centers that are coupled with an elementary school or a day school usually only had a director and no assistant director or senior staff because the school administration was centralized. The good thing for research purposes: they were more likely to have a secretary to answer the phone.

However, most, of the centers have the following organizational structure:

- One head of school or director
- One assistant director/Senior Staff
- A number of teachers based upon the number of children in the center
- A number of aides based upon the number of children in the center

Each licensed center must comply with a staff to child ratio set by the Maryland State Department of Education’s Office of Child Care:

Age	Staff/Child Ratio	Maximum Group Size
Infant (0-12 months)	1:3	6
Toddler (12-24 months)	1:3	9
2-years old	1:6	12
3 & 4 years old	1:10	20
5-years old	1:15	30

MINIMUM STAFFING NEED FOR CENTER WITH 120 CHILDREN

Age group	# of children	# of classrooms	Staffing need	# of licensed teachers	# of aides
HEAD OF SCHOOL/DIRECTOR			1		
ASSISTANT DIRECTOR/OPERATOR			1		
Infant (0-12 months)	6	1	2	1	1
Toddler (12-24 months)	9	1	3	1	2
2-year olds	24	2	4	1	3
3-year olds	26	2	3*	1	2
4-year olds	30	2	3	1	2
5-year olds	25	2	2*	1	1
TOTALS	120	10	19	6	11

Note: these numbers are based upon same age classes, not mixed-age classes.

**Staff need was rounded up since you can’t employ a fraction of people.*

Salaries. Salaries also vary by center and while some have a sliding scale to match seniority, most do not.

Annual Wage Rate Information

Child Care Center Director	\$38,997
Center Senior Staff/Teacher	\$26,172
Center Aide	\$18,096

Sources: MSDE, Oct 2012; Association of Independent Maryland Schools (AIMS), 2013-14 school year, and MFN's 2013 Statewide Survey of Family Child Care Providers and Child Care Centers.

COOPERATIVES

We also researched three cooperative child care centers in the vicinity of College Park and in this section give a good overview of what cooperatives offer, and how they work.

Accreditation. Only one cooperative, the Greenbelt Nursery School is accredited by NAEYC, both the College Park Nursery School and the University Church Nursery School are accredited through the MSDE process.

Hours of operation. Each cooperative we researched is open September through June. They follow a federal holiday schedule, and all three follow PGCPs in inclement weather. There are a few days closed and this is at the directors discretion – usually for training or cleaning.

Staff/student ratio. Cooperatives generally offer better ratios because parents are involved in the classroom but they also must adhere to the MSDE standards.

Expectations of parents. Cooperative child care centers have the philosophy that parents are children's number one teacher and so cooperatives give parents the opportunity to participate in their child's education. For a cooperative center to run, however, parents must participate in some of the operational work, as well as the teaching/fun stuff. Some expectations of parents include:

- Operations – administrative, scheduling parent staffing, organizational activities, etc.
- Staffing classrooms
- Housekeeping or cleaning fee
- Fundraising for school

Price variance based on parent participation. Most cooperatives have a policy that everyone has to pitch in regarding the operation of the facility – but not the teaching. And that determines the price tag. At some locations, the price will be determined by whether the parents are members or not. Some offer a sliding scale based on parent participation, others do not.

Since there's no real way to compare the prices – each offers a different schedule, different hours, a different program, we've gone ahead and provided a snap shot of each cooperative's pricing here.

Greenbelt Nursery School (prices per month)

5 mornings/week for pre-school (2-4 yr olds, 9:00 a.m. to 11:30 am.) –

Those who are full-time co-op members: \$299

Those who are limited co-op members: \$369

Those who are non co-op members: \$403

3 mornings/week for pre-school (2-4 yr olds, 9:00 a.m. to 11:30 am.) –

Those who are full-time co-op members: \$180

Those who are limited co-op members: \$213

Those who are non co-op members: \$242

Notes about pricing –

- *Full-time co-op members teach classes 2-3 times per month plus admin, housekeeping, fundraising, etc.*
- *Limited co-op members teach classes 1 time per month plus admin, housekeeping, fundraising.*
- *Non co-op members don't have to teach.*

Other fees –

- Enrichment activities (extended day, essentially) are \$30/day until 4:00 p.m. or \$35/day until 6:00 p.m.
- Lunch bunch (lunch at the center) is \$10/day
- Application fee: \$50 for new members, \$25 for current members
- Activities are \$50

College Park Nursery School (prices per month)

2 mornings per week (2/3 year olds, 9:00 a.m. to 11:30 a.m.): \$180

3 mornings per week (3-4 year olds, 9:00 a.m. to 11:30 a.m.): \$235

4 mornings per week (pre-k, 9:00 a.m. to 12:00 p.m.): \$400

4 mornings per week (pre-k, 12:30 p.m. to 3:00 p.m.) \$275

Other fees –

- It is \$7/hour to stay until 3:00 p.m.
- There is a \$50 annual cleaning fee.

University Church Nursery School (prices per month)

Two year old class (2 days per week, 9:00 a.m. to 1:00 p.m.): \$300

Two year old class (3 days per week, 9:00 a.m. to 1:00 p.m.): \$430

Three year old class (3 days per week, 9:00 a.m. to 1:00 p.m.): \$385

Four year old class (4 days per week, 9:00 a.m. to 1:00 p.m.): \$465

Other fees –

- There is a \$50 snack and supplies fee
- The application fee is \$70, plus deposit for first month's enrollment

SOURCES: CHARACTERISTIC INFORMATION

Interviews of child care providers conducted by CPCUP program associate between February and April, 2014

Maryland Family Network

<http://marylandfamilynetwork.org/>

Prince George's County Child Resource Center

http://www.childresource.org/programs_locate.php

Maryland Directory of Public Pre-Kindergartens

http://www.marylandpublicschools.org/MSDE/divisions/child_care/early_learning/docs/2013-2014PreKDirectory011714.pdf

SURVEY ANALYSIS

OVERVIEW

This report documents the results from a child care needs assessment conducted by the College Park City-University Partnership on behalf of the City of College Park and the University of Maryland. The survey polled the community and University faculty and staff to obtain perspectives on child care from families who live and/or work in the vicinity of College Park that have young children or are expecting young children in the future.

Survey instrument. The survey instrument used in this study was FormStack – a national online form provider. The questionnaire contained 26 original questions – including 34 subset questions that were asked if the participant’s prior response indicated they were relevant to answer a follow-up question. The survey also included an optional section that dealt mainly with what kind of programs people would like to see. That section included 21 main questions and 44 subsequent questions. Most of the questions included ranges to determine options, needs and importance of various factors going forward.

Survey administration. The survey was administered online from April 29, 2014 to May 16, 2014. The survey was sent out by the University of Maryland to all faculty and staff and by the City of College Park and surrounding neighborhoods online. For the University there was one reminder email sent. For the folks outside of the University community, the survey was sent every other day to listservs, local governments, community development corporations and more. There were 1,234 responses to the survey.

Survey analysis. Our analysis starts with tabulations across the three major target markets – UMD affiliates both in and out of the target areas, and non-UMD affiliates (community members) that live in target areas. The target market analyzed included: College Park, Berwyn Heights, University Park, Greenbelt, Hyattsville, Beltsville, Adelphi, Riverdale, Riverdale Park. The zip codes included: 20705, 20710, 20712, 20722, 20737, 20740, 20742, 20770, 20781, 20782, 20783, 20787.

TABLE OF CONTENTS

***SURVEY DEMOGRAPHICS*..... 34**

***SURVEY TABULATIONS*..... 36**

 Family Profile36

 Children’s ages (# derived from families with kids)36

 Types of non-parental child care used36

 Overall satisfaction with care.....37

 Satisfaction with center-based care.....37

***SURVEY TABULATIONS (Future Care Analysis)*..... 41**

 Future care.....41

 How important are the following characteristics when choosing a child care provider?41

 Will you use non-parental child care in the next 5 years?.....43

***WHEN IS CHILD CARE NEEDED?* 44**

***PRICE POINTS PER INSTRUCTOR*..... 47**

***DOES AFFILIATION MATTER?* 48**

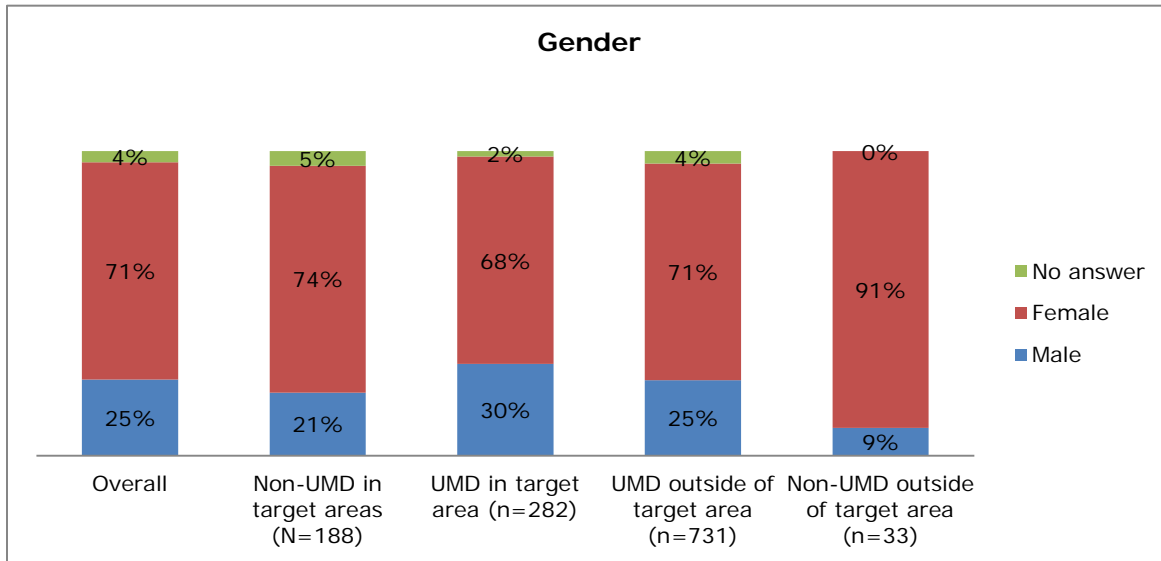
***DOES LOCATION MATTER?*..... 50**

***OPTIONAL SECTION RESULTS*..... 52**

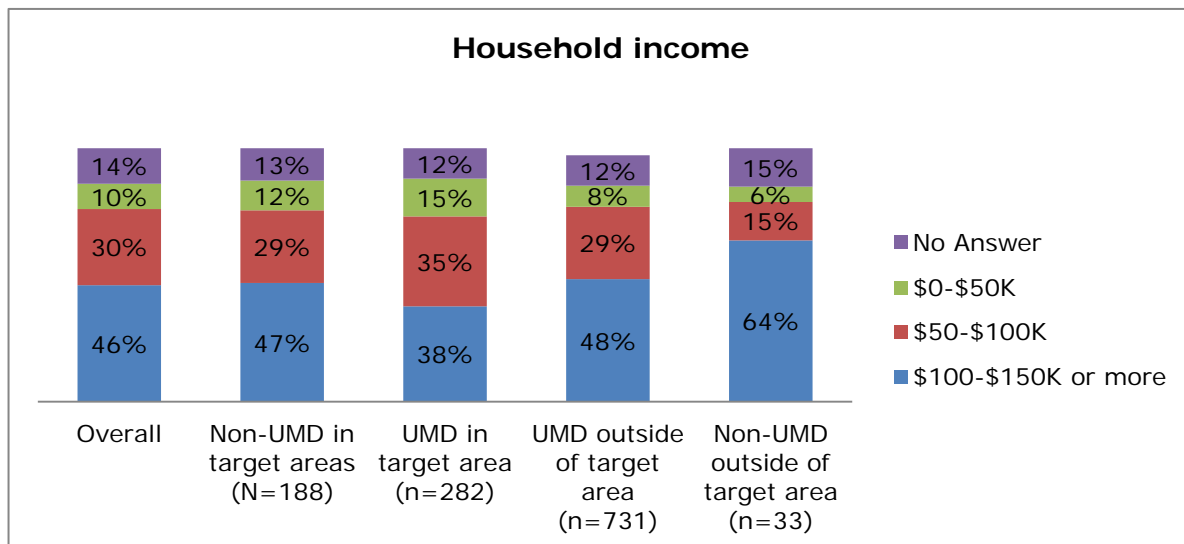
***INITIAL SURVEY CONCLUSIONS*..... 61**

SURVEY DEMOGRAPHICS

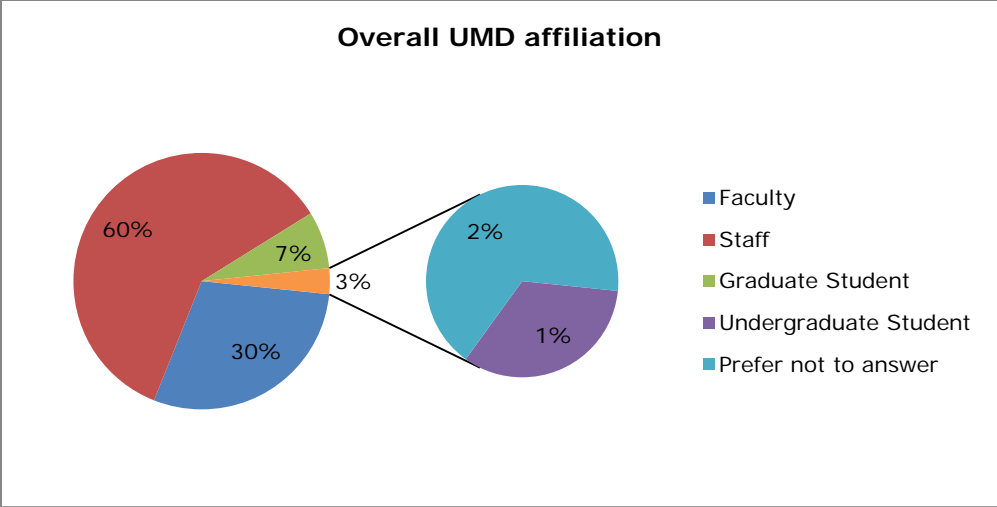
Gender. Females make up 71% of all survey respondents. Male respondents registered an average of 23% from target areas and UMD outside of the target areas – and 9% outside of UMD and target areas.



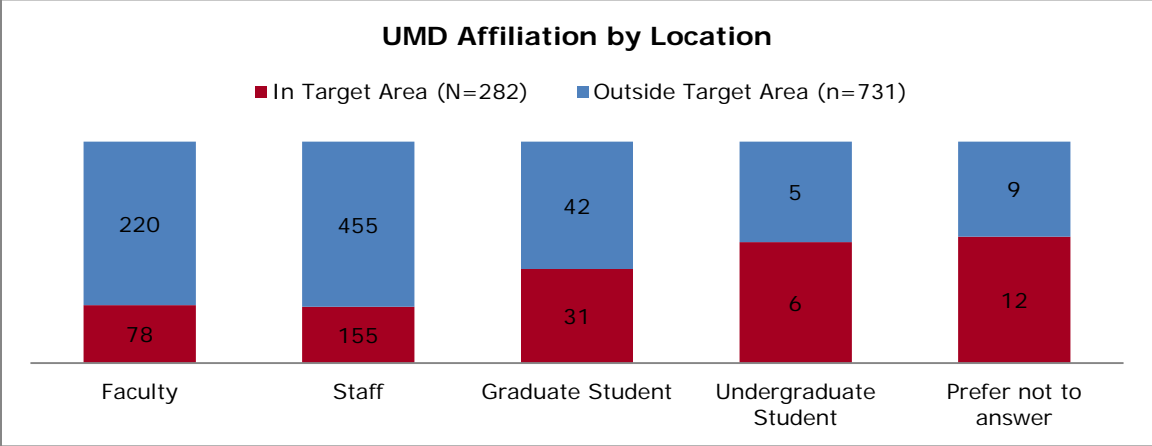
Purchasing power. 76% of respondents reported that their household income was between \$50,000 and \$150,000 or more. Some variation may be due to confusion over the question. Some people, for example, may have indicated their total household income; others might have registered their personal income and did not incorporate their total household income.



UMD affiliation. In total there were 1,013 responses from the University of Maryland. Almost 90 percent were either Faculty or Staff. Seven percent were graduate students and 3 percent were either undergraduate students or did not answer.



Our demographic research indicated that there were roughly 965 UMD-families living in the areas around College Park in 2012. Of course, not all of them have families or children under the age of 6, but we can confidently say we captured about 30% of all the UMD families living in the vicinity of College Park.



SURVEY TABULATIONS

Affiliation	Overall ¹		Non-UMD (Target)		UMD (Target)		UMD (Non-target)	
	#	%	#	%	#	%	#	%
<i>Family Profile</i>								
Number of responses	1234		188		282		731	
Have children under age 6	526	42%	113	60%	113	40%	278	38%
<i>Have children and will or might add children in the next 2-3 years</i>	322	61%	76	67%	67	59%	162	58%
<i>Have children but will not add children in the next 2-3 years</i>	204	39%	37	33%	46	16%	116	42%
Have more than one child	240	45%	49	43%	47	41%	136	49%
<i>Have more than one child and will or might add children in the next 2-3 years</i>	90	37%	17	34%	21	44%	45	33%
Have only have one child	286	54%	64	56%	66	58%	142	51%
<i>Have only one child, but will or might add children in the next 2-3 years</i>	232	81%	58	92%	46	70%	116	81%
No children but will or might add children in next 2-3 years	260	21%	27	15%	69	24%	164	22%
No children, no plans for children	446	36%	48	25%	104	36%	288	39%
<i>Children's ages (# derived from families with kids)</i>								
Infants	27%		39	35%	37	33%	64	23%
One year	19%		23	20%	22	19%	54	19%
Two years	28%		30	27%	33	29%	77	28%
Three years	23%		25	22%	18	16%	72	27%
Four years	15%		11	10%	16	14%	47	17%
Five years	14%		16	14%	23	20%	34	12%
<i>Note: 33 families responded that were not affiliated with UMD and did not live in the target areas. They are represented in the overall total, but not separately analyzed at this time.</i>								
<i>Types of non-parental child care used</i>								
Total # of people using non-parental child care	438	83%	90	80%	90	80%	238	86%

Affiliation	Overall ¹		Non-UMD (Target)		UMD (Target)		UMD (Non-target)	
	#	%	#	%	#	%	#	%
Child care center affiliated with work/school	42	9%	7	8%	11	12%	24	10%
Child care center unaffiliated with work/school	222	51%	41	45%	56	62%	118	50%
In-Home day care	84	19%	19	21%	9	10%	47	20%
Nanny, Au Pair, Babysitter	56	13%	13	14%	8	9%	17	7%
Nanny-share	16	4%	2	2%	5	6%	4	2%
Family and friends	76	17%	8	8%	16	18%	28	12%
% of people using secondary type of child care for first child in non-parental care		8%		14%		17%		1%
% of people using different child care for additional children		14%		26%		3%		14%

Overall satisfaction with care

% of those very satisfied or satisfied with current care	80%	79%	75%	81%
% of those who are neutral to current care	15%	14%	19%	15%
% of those who are unsatisfied or very unsatisfied with current care	5%	7%	5%	4%

Satisfaction with center-based care

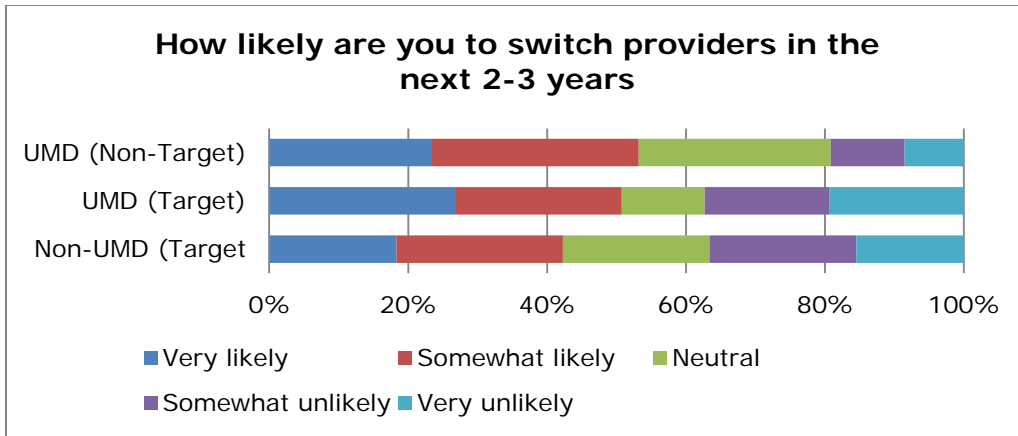
Total # of people using center-based care	264	60%	48	53%	67	74%	142	59%
Proximity to home								
Very satisfied or satisfied	193	73%	39	81%	51	76%	98	69%
Unsatisfied or very unsatisfied	42	16%	6	13%	11	16%	23	16%
Neutral	29	11%	3	6%	5	7%	21	15%
Proximity to work								
Very satisfied or satisfied	126	47%	20	41%	45	67%	57	40%
Unsatisfied or very unsatisfied	85	32%	18	38%	13	19%	61	43%
Neutral	53	20%	10	21%	9	13%	24	17%
Accessible via public transportation								
Very satisfied or satisfied	58	22%	13	27%	20	30%	22	15%
Unsatisfied or very unsatisfied	74	28%	13	27%	24	36%	35	25%
Neutral	132	50%	22	46%	23	34%	85	60%
The hours of operation								
Very satisfied or satisfied	216	81%	39	81%	52	78%	117	82%
Unsatisfied or very unsatisfied	28	11%	3	6%	11	16%	14	10%

Affiliation	Overall ¹		Non-UMD (Target)		UMD (Target)		UMD (Non-target)	
	#	%	#	%	#	%	#	%
Neutral	20	8%	6	13%	4	6%	11	8%
Optional weekend or evening hours								
Very satisfied or satisfied	21	8%	3	6%	6	9%	13	9%
Unsatisfied or very unsatisfied	140	53%	23	48%	41	61%	72	51%
Neutral	103	39%	22	45%	20	30%	57	40%
Affordability								
Very satisfied or satisfied	101	38%	20	41%	28	42%	48	34%
Unsatisfied or very unsatisfied	103	39%	18	39%	23	34%	61	43%
Neutral	60	23%	10	20%	16	24%	33	23%
I can volunteer my time and reduce my child care fees								
Very satisfied or satisfied	14	5%	5	10%	6	9%	4	3%
Unsatisfied or very unsatisfied	130	49%	26	54%	32	48%	68	48%
Neutral	120	45%	17	35%	29	43%	70	49%
Siblings can be care for in same center								
Very satisfied or satisfied	114	43%	22	45%	31	46%	57	40%
Unsatisfied or very unsatisfied	38	14%	6	13%	9	13%	17	12%
Neutral	112	42%	20	42%	27	40%	62	44%
Teachers have a degree in early childhood education								
Very satisfied or satisfied	142	54%	24	50%	35	52%	78	54%
Unsatisfied or very unsatisfied	65	24%	13	27%	19	28%	32	23%
Neutral	57	22%	11	23%	13	21%	32	23%
Staff is licensed/certified								
Very satisfied or satisfied	217	82%	37	77%	57	85%	116	81%
Unsatisfied or very unsatisfied	19	7%	5	10%	8	12%	6	4%
Neutral	28	11%	6	13%	2	3%	20	14%
Long-term retention of staff								
Very satisfied or satisfied	175	67%	28	58%	48	72%	92	64%
Unsatisfied or very unsatisfied	50	19%	12	25%	13	19%	25	18%
Neutral	39	14%	8	17%	6	9%	25	18%
Bilingual staff and program for bilingual children								
Very satisfied or satisfied	73	28%	6	13%	21	31%	43	30%
Unsatisfied or very unsatisfied	75	29%	17	35%	16	24%	39	27%
Neutral	116	44%	25	52%	30	45%	59	42%
Program accreditation								
Very satisfied or satisfied	159	60%	22	46%	47	70%	87	61%
Unsatisfied or very unsatisfied	31	12%	9	19%	7	10%	13	9%
Neutral	74	28%	17	35%	13	20%	42	30%
Program has an academic approach								
Very satisfied or satisfied	165	63%	33	69%	41	61%	88	62%
Unsatisfied or very unsatisfied	30	11%	4	8%	14	21%	12	8%
Neutral	69	26%	11	23%	12	18%	42	30%

Affiliation	Overall ¹		Non-UMD (Target)		UMD (Target)		UMD (Non-target)	
	#	%	#	%	#	%	#	%
Program has a play-based approach								
Very satisfied or satisfied	192	73%	35	73%	49	73%	103	73%
Unsatisfied or very unsatisfied	15	5%	4	8%	5	7%	6	4%
Neutral	57	22%	9	19%	13	19%	33	23%
Program philosophy								
Very satisfied or satisfied	161	61%	28	58%	41	61%	85	60%
Unsatisfied or very unsatisfied	24	9%	7	15%	6	9%	11	8%
Neutral	79	30%	13	27%	20	30%	46	32%
What type of philosophy is currently offered?								
Not sure	174	66%	29	60%	48	72%	96	68%
Creative Curriculum	55	21%	11	23%	11	16%	32	23%
Montessori	24	9%	3	1%	8	12%	11	8%
Bank Street	3	1%	1	0%	1	0%	1	0%
High Scope	3	1%	1	0%	1	0%	1	0%
Parent Co-Op	7	3%	4	8%	1	0%	2	1%
Reggio-Emilia	8	3%	1	0%	0	0%	6	4%
Waldorf	1	0%	1	0%	0	0%	0	0%

How much are people paying for their current center-based care?

Affiliation	Non-UMD (Target) N=48	UMD (Target) N=67	UMD (Non-Target) N=142
\$2,501 to \$3,000	0%	0%	0%
\$2,001 to \$2,500	7%	1%	12%
\$1,501 to \$2,000	10%	8%	12%
\$1,001 to \$1,500	31%	40%	19%
\$501 to \$1,000	39%	36%	38%
Under \$500	13%	12%	19%

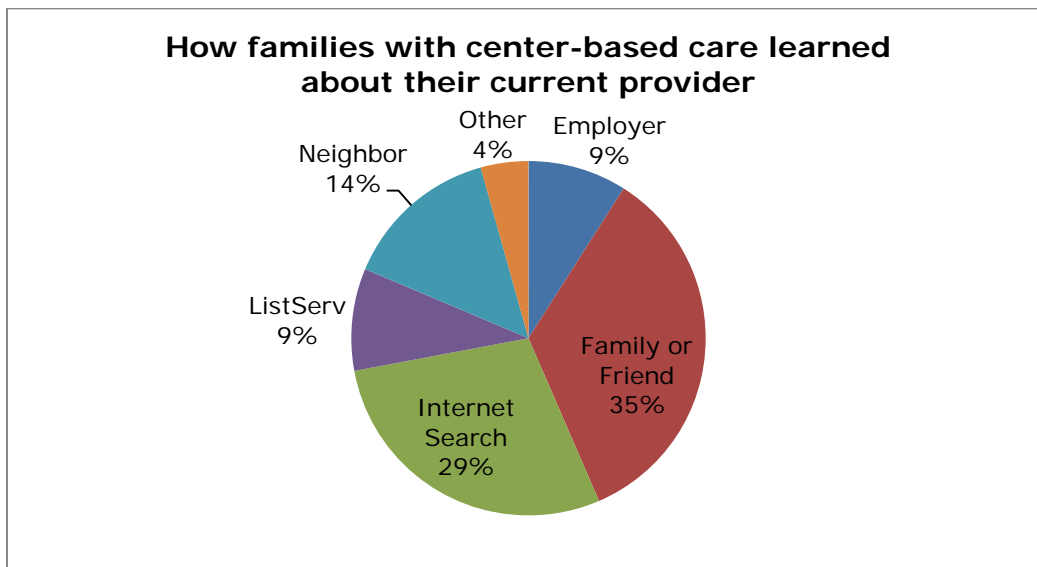


Just under half of the total said they were either very likely or somewhat likely to switch providers in the next 2-3 years.

The survey asked respondents to identify which providers they would consider switching to. While many did not know or would not say, the heavy favorites included local programs researched in the market analysis (see Market Analysis). Interestingly, UMD and Non-UMD in target areas listed local child care/pre-K options, while UMD families outside the target area were more interested with programs that stretched through elementary school, in addition to local programs. For further reflection upon which programs people prefer for their children, please see the cross tabs below on “Other Schools”.

How did people find out about their current child care provider?

There was very little difference between the groups regarding how they learned about their child care provider. Most learned of their current provider from a family member or friend, or an internet search.



SURVEY TABULATIONS (Future Care Analysis)

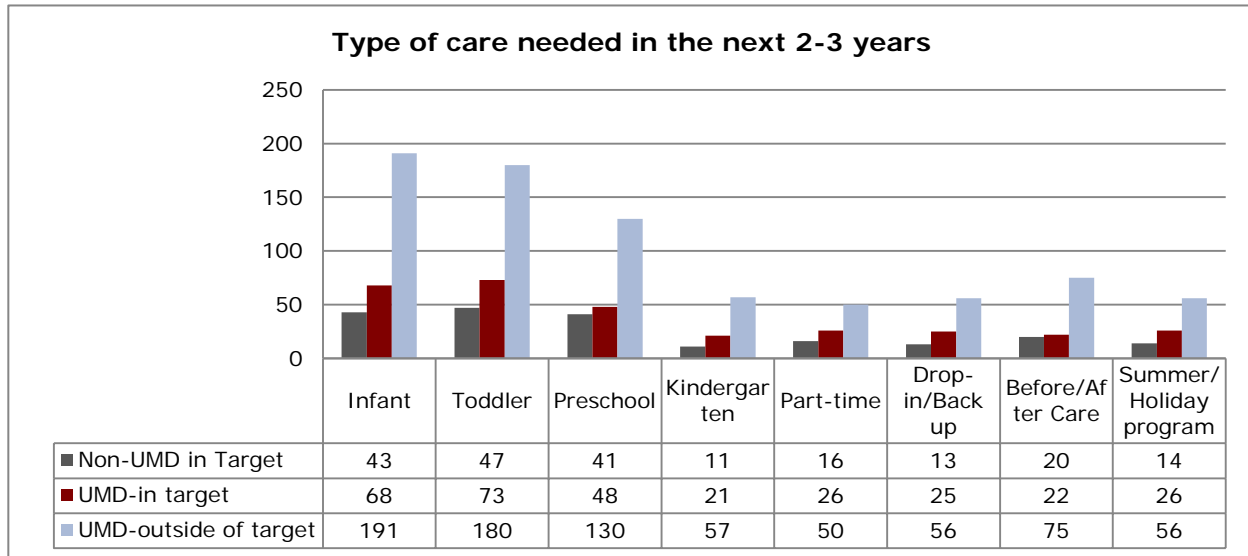
Affiliation	Overall		Non-UMD (Target)		UMD (Target)		UMD (Non-target)	
	#	%	#	%	#	%	#	%
<i>Future care</i>								
Overall number of people who are in or will be in the market in the next 2-3 years for child care	786 ¹		148		187		442	
Families that specifically indicated they will or might add children in the next 2-3 years	582		103		136		326	
<p><i>Note: The number 786 indicates families who both have kids currently and will add kids in the future and therefore will be in the market for the next several years. 582 is the total number (people with kids and without currently) that indicated they will or might add children to their families in the next 2-3 years. 204 people have kids now but will not add kids in the future. The answers below are representative of those that answers the will or might add children.</i></p>								
<i>How important are the following characteristics when choosing a child care provider?</i>								
Proximity to home								
Very or somewhat important	410	70%	103	100%	92	68%	215	66%
Very or somewhat unimportant	8	1%	0	0%	1	1%	7	2%
Neutral	146	25%	0	0%	42	31%	104	32%
Proximity to work								
Very or somewhat important	393	68%	50	48%	105	77%	238	73%
Very or somewhat unimportant	38	7%	33	33%	2	2%	3	1%
Neutral	129	22%	20	19%	29	21%	80	25%
Accessible via public transportation								
Very or somewhat important	148	25%	45	44%	38	28%	65	20%
Very or somewhat unimportant	189	32%	25	24%	24	18%	140	43%
Neutral	227	39%	33	32%	73	54%	121	37%
The hours of operation								
Very or somewhat important	438	75%	93	90%	100	72%	245	75%
Very or somewhat unimportant	0	0%	0	0%	0	0%	0	0%
Neutral	126	22%	10	10%	36	27%	80	25%
Optional weekend or evening hours								
Very or somewhat important	207	36%	45	44%	41	30%	121	37%
Very or somewhat unimportant	145	25%	33	34%	34	25%	78	24%
Neutral	212	36%	25	25%	60	44%	127	39%
Affordability								
Very or somewhat important	436	75%	97	95%	94	69%	245	75%
Very or somewhat unimportant	4	1%	1	1%	0	0%	3	1%
Neutral	123	21%	4	4%	41	30%	78	24%
Volunteering reduces fees								
Very or somewhat important	217	37%	49	48%	54	40%	114	35%
Very or somewhat unimportant	99	17%	20	20%	20	15%	59	18%

Affiliation	Overall		Non-UMD (Target)		UMD (Target)		UMD (Non-target)	
	#	%	#	%	#	%	#	%
Neutral	246	43%	33	32%	60	44%	153	47%
Siblings can be cared for in the same center								
Very or somewhat important	302	52%	81	79%	61	45%	160	49%
Very or somewhat unimportant	45	8%	8	8%	14	10%	23	7%
Neutral	216	38%	13	13%	60	44%	143	44%
Teachers have a degree in early childhood education								
Very or somewhat important	390	44%	92	89%	83	61%	215	66%
Very or somewhat unimportant	11	28%	1	1%	3	2%	7	2%
Neutral	163	50%	10	10%	49	36%	104	32%
Staff is licensed/certified								
Very or somewhat important	448	77%	102	99%	98	72%	248	76%
Very or somewhat unimportant	0	0%	0	0%	0	0%	0	0%
Neutral	117	20%	1	1%	38	28%	78	24%
Long-term retention of staff								
Very or somewhat important	425	73%	97	94%	94	69%	234	72%
Very or somewhat unimportant	0	0%	0	0%	0	0%	0	0%
Neutral	136	23%	6	6%	42	30%	88	27%
Bilingual Staff								
Very or somewhat important	195	34%	47	46%	40	29%	108	33%
Very or somewhat unimportant	115	20%	18	17%	32	24%	65	20%
Neutral	225	44%	38	37%	64	47%	153	47%
Program accreditation								
Very or somewhat important	380	65%	92	89%	83	61%	205	63%
Very or somewhat unimportant	8	1%	0	0%	1	1%	7	2%
Neutral	177	30%	11	11%	52	38%	114	35%
Academic approach								
Very or somewhat important	336	58%	81	79%	63	46%	192	59%
Very or somewhat unimportant	31	5%	8	8%	10	8%	13	4%
Neutral	197	34%	13	13%	63	46%	121	37%
Play-based approach								
Very or somewhat important	368	63%	90	87%	76	56%	202	62%
Very or somewhat unimportant	8	1%	1	1%	0	0%	7	2%
Neutral	183	32%	11	11%	58	43%	114	35%
Program philosophy								
Very or somewhat important	383	65%	92	89%	76	56%	215	66%
Very or somewhat unimportant	7	1%	0	0%	4	3%	3	1%
Neutral	173	30%	11	11%	54	40%	108	33%

To determine what the future market might hold, the survey polled people to see if they would be using non-parental child care in the future.

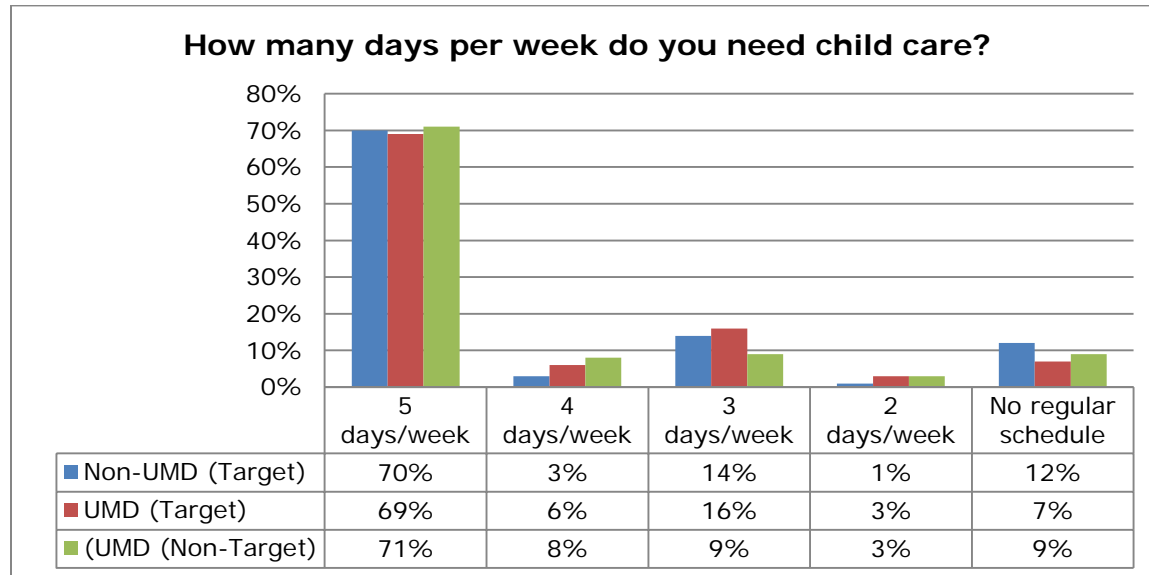
Affiliation	Non-UMD (Target)	UMD (Target)	UMD (Non-Target)
<i>Will you use non-parental child care in the next 5 years?</i>			
Yes	46%	72%	57%
Might	10%	13%	26%
Not Sure	37%	12%	16%
No	8%	3%	1%

These numbers indicate there will be a strong market in the next 5 years. Although it is interesting that those who live in the target areas, but are not associated with UMD, are more likely to be unsure as to whether or not they will utilize a non-parental child care provider.



WHEN IS CHILD CARE NEEDED?

The survey drilled down in a number of ways to determine when families needed child care – the days of the week, the times of the day, and whether or not people needed care on the weekends.



While most people indicated they would need child care five days a week, the next biggest group was a group of parents who would need child care three days a week. This is consistent with what is currently offered in the child care market and could potentially be an option for a child care center to include once it was financially stable.

Is child care needed on the weekends?

73% of those who will add children to their families in the future thought it is important to have options for evening or weekend hours, but only 14 people out of this group actually needed care on the weekends – of the 14 people who need care, only half need a regular schedule. 58% of those who will or might add children to their families in the future need care on the weekends periodically, but not on a regular basis, and the rest did not need care on the weekends.

47% of those who have kids and use non-parental child care were unsatisfied with the current child care providers optional or weekend hours. However, only 12 of those people then indicated they need care on a regular basis during the weekends – of the 23 that need care, only 5 need a regular schedule. 60% of those who have kids, use non-parental child care and are unsatisfied with their provider, would like to have child care on the weekends periodically, but not on a regular basis.

What time do people need child care to start and end Monday through Friday? The survey asked people to indicate what time they would need to drop their children off and what time they would pick their children up. The results below do not differentiate between various daily schedules, i.e. 3 days per week versus 5 days per week. The results indicate that drop-off is a bit more flexible than evening pick-up. The morning drop-off time ranges from 7:00 a.m. to 9:00 a.m. and tapers off after that. The evening pick-up is generally between 5:00 p.m. and 6:00 p.m. – although there’s a decent crowd that would pick their children up between 4:30 p.m. and 5:00 p.m.

Start hours M-F	Non-UMD (Target) % (N=140)	UMD (Target) % (N=178)	UMD (Non-Target) % (N=326)
6:00 - 6:30 a.m.	2%	3%	4%
6:30 - 7:00 a.m.	9%	2%	9%
7:00 - 7:30 a.m.	22%	10%	18%
7:30 - 8:00 a.m.	22%	20%	19%
8:00 - 8:30 a.m.	19%	24%	23%
8:30 - 9:00 a.m.	11%	18%	15%
After 9:00 a.m.	3%	2%	7%
No regular schedule	11%	19%	6%

End hours M-F	Non-UMD (Target) % (N=140)	UMD (Target) % (N=178)	UMD (Non-Target) % (N=326)
3:30 - 4:00 p.m.	3%	1%	4%
4:00 - 4:30 p.m.	8%	6%	6%
4:30 - 5:00 p.m.	18%	10%	14%
5:00 - 5:30 p.m.	10%	17%	24%
5:30 - 6:00 p.m.	35%	37%	30%
After 6:00 p.m.	14%	6%	15%
Before 3:30 p.m.	4%	2%	0%
No regular schedule	8%	19%	6%

What is the need for care in the evening hours, Monday through Friday?

A total of 252 people need child care in the evenings frequent or on occasion, which constitutes 32 percent of the total number of people who are currently in the market for child care or will be in the next 2-3 years. For those that need child care in the evenings frequently, all need child care starting at 6:00 p.m. and ending at 9:30 p.m.

For those that need child care on occasion in the evenings, we calculated that most people need care starting by 7:00 p.m. and ending by 10:00 p.m.

Evening start hours M-F	Non-UMD (Target) % (N=54)	UMD (Target) % (N=64)	UMD (Non-Target) % (N=134)
6:00 - 6:30 p.m.	86%	80%	81%
6:30 - 7:00 p.m.	11%	16%	11%
7:00 - 7:30 p.m.	3%	4%	5%

There was little difference between start times for those who needed care ending at 11:30 p.m. as opposed to those who needed care ending at 9:00 p.m. – everyone's start times were in the 6:00 p.m. to 7:00 p.m. range, as noted above.

Evening end hours M-F	Non-UMD (Target) % (N=54)	UMD (Target) % (N=64)	UMD (Non-Target) % (N=134)
8:30 - 9:00 p.m.	54%	29%	46%
9:00 - 9:30 p.m.	15%	12%	13%
9:30 - 10:00 p.m.	13%	14%	13%
10:00 - 10:30 p.m.	6%	16%	11%
10:30 - 11:00 p.m.	6%	12%	6%
11:00 - 11:30 p.m.	7%	14%	11%

PRICE POINTS PER INSTRUCTOR

Non-UMD in target area

Amount people would pay per month	College Student	Graduate Student	College Graduate	Licensed/certified teacher	Teacher with 4-year degree in early childhood education	Retired Teacher	Veterans	Retiree
\$2001-\$2500	0	0	2	1	2	3	1	1
\$1500 - \$2000	3	4	3	7	13	6	3	4
\$1201 - \$1500	2	1	4	22	24	17	4	4
\$901 - \$1200	3	19	49	37	37	30	11	15
\$601 - \$900	38	51	27	28	19	36	48	51
Under \$600	59	27	19	10	8	10	29	26
Total	105	102	104	105	103	102	96	101

UMD in target area

Amount people would pay per month	College Student	Graduate Student	College Graduate	Licensed/certified teacher	Teacher with 4-year degree in early childhood education	Retired Teacher	Veterans	Retiree
\$2001-\$2500	0	0	1	1	2	1	0	0
\$1500 - \$2000	0	1	0	6	7	2	1	1
\$1201 - \$1500	2	5	8	12	18	14	2	5
\$901 - \$1200	8	11	14	25	31	27	13	15
\$601 - \$900	21	37	42	39	27	29	26	29
Under \$600	65	42	28	14	12	19	45	43
Total	96	96	93	97	97	92	87	93

UMD outside target area

Amount people would pay per month	College Student	Graduate Student	College Graduate	Licensed/certified teacher	Teacher with 4-year degree in early childhood education	Retired Teacher	Veterans	Retiree
\$2,501-\$3,000	0	0	1	1	3	2	0	0
\$2001-\$2500	1	1	1	6	8	4	0	0
\$1500 - \$2000	1	3	4	19	27	17	3	6
\$1201 - \$1500	8	13	20	38	54	40	16	22
\$901 - \$1200	15	27	45	67	63	61	32	31
\$601 - \$900	49	82	81	69	53	70	70	77
Under \$600	148	95	66	28	20	27	86	79
Total	222	221	218	228	228	221	207	215

DOES AFFILIATION MATTER?

The survey asked folks to indicate how likely they would be to send their children to a child care center if it were affiliated with the City of College Park, or with the University of Maryland. Based on the results, we can safely say that affiliation changes the likelihood of enrollment but not price points.

Overall, the results were (N=786):

- 44% are very or somewhat likely to enroll their child if the center is affiliated with College Park
 - 45% would pay \$501-\$1,000 per month
 - 21% would pay \$1,001-\$1,500 per month
- 85% are very or somewhat likely to enroll their child if the center is affiliated with the University of Maryland
 - 35% would pay \$501-\$1,000 per month
 - 34% would pay \$1,001-\$1,500 per month

Below is the breakout between groups.

Non-UMD Families in target areas

How likely are you to send your children to a center if it is ...	Affiliated with the City of College Park	Affiliated with UMD
Very likely	29%	42%
Somewhat likely	34%	33%
Neutral	31%	20%
Somewhat unlikely	4%	4%
Very unlikely	2%	2%

If very likely/somewhat likely, how much would you pay per month?	N=82	N=105
\$2001-\$2500	1%	1%
\$1501 - \$2000	1%	6%
\$1001 - \$1500	25%	26%
\$501 - \$1000	55%	27%
Under \$500	10%	6%
Undecided/don't know	8%	34%

UMD-affiliated families in target area

How likely are you to send your children to a center if it is ...	Affiliated with the City of College Park	Affiliated with UMD
Very likely	17%	58%
Somewhat likely	38%	25%
Neutral	43%	15%
Somewhat unlikely	2%	0%
Very unlikely	1%	1%

If very likely/somewhat likely, how much would you pay per month?	N=98	N=147
\$2001-\$2500	1%	1%
\$1501 - \$2000	1%	3%
\$1001 - \$1500	27%	32%
\$501 - \$1000	35%	35%
Under \$500	18%	15%
Undecided/don't know	18%	14%

UMD-affiliated families outside target areas

How likely are you to send your children to a center if it is ...	Affiliated with the City of College Park	Affiliated with UMD
Very likely	9%	54%
Somewhat likely	21%	26%
Neutral	45%	17%
Somewhat unlikely	17%	0%
Very unlikely	7%	2%

If very likely/somewhat likely, how much would you pay per month?	N=99	N=263
\$2001-\$2500	1%	1%
\$1501 - \$2000	1%	8%
\$1001 - \$1500	7%	26%
\$501 - \$1000	14%	27%
Under \$500	5%	8%
Undecided/don't know	72%	29%

DOES LOCATION MATTER?

The survey also drilled-down to determine whether or not a child care center on campus or off campus would be more preferable. Based on the results, we can again say location changes the likelihood of enrollment but not the preferred price point. (N=786)

- 85% are very or somewhat likely to enroll their child if the center is located ON Campus
 - 36% would pay \$501-\$1,000 per month
 - 30% would pay \$1,001-\$1,500 per month

- 74% are very or somewhat likely to enroll their child if the center is located NEAR campus
 - 35% would pay \$501-\$1,000 per month
 - 34% would pay \$1,001-\$1,500 per month

Non-UMD (Target)

How likely are you to send your children to a center if it is ...	Located NEAR the University	Located ON the University
Very likely	36%	33%
Somewhat likely	40%	25%
Neutral	17%	26%
Somewhat unlikely	4%	10%
Very unlikely	3%	5%
If very likely/somewhat likely, how much would you pay per month?	N=106	N=81
\$2501 - \$3000	0%	1%
\$2001-\$2500	0%	1%
\$1501 - \$2000	5%	3%
\$1001 - \$1500	22%	21%
\$501 - \$1000	32%	24%
Under \$500	9%	4%
Undecided/don't know	32%	46%

UMD (Target)

How likely are you to send your children to a center if it is ...	Located NEAR the University	Located ON the University
Very likely	38%	68%
Somewhat likely	41%	18%
Neutral	20%	13%
Somewhat unlikely	1%	0%
Very unlikely	1%	1%
If very likely/somewhat likely, how much would you pay per month?	141	153
\$2501 - \$3000	1%	0%
\$2001-\$2500	1%	2%
\$1501 - \$2000	2%	8%
\$1001 - \$1500	29%	32%
\$501 - \$1000	37%	31%
Under \$500	17%	12%
Undecided/don't know	13%	15%

UMD (outside target)

How likely are you to send your children to a center if it is ...	Located NEAR the University	Located ON the University
Very likely	24%	65%
Somewhat likely	40%	18%
Neutral	25%	14%
Somewhat unlikely	6%	1%
Very unlikely	4%	2%
If very likely/somewhat likely, how much would you pay per month?	209	270
\$2501 - \$3000	1%	1%
\$2001-\$2500	5%	4%
\$1501 - \$2000	11%	14%
\$1001 - \$1500	31%	29%
\$501 - \$1000	35%	32%
Under \$500	13%	8%
Undecided/don't know	2%	12%

OPTIONAL SECTION RESULTS

The first part of the survey ended once people gave us their demographic information. Then respondents were given the choice to hit the submit button or to continue on with the survey to give us some additional information about issues specifically related to the center's characteristics, the impression that people had about other schools in the area, infant-specific, and program add-ons.

Overall, 52% continued with the survey to tell us what additional program designs would be best.

The breakdown is as follows:

- 105 Non-UMD families in the target area
 - 83 UMD-affiliated families in the target area
 - 175 UMD-affiliated families outside the target area
-

UMD AFFILIATED - WITH KIDS/PLANS FOR KIDS N=83 NON-UMD AFFILIATED - WITH KIDS/PLANS FOR KIDS N=105

Crosstabs

Other schools	Gave opinion (%)		Have heard of (%)		UMD AFFILIATED - WITH KIDS/PLANS FOR KIDS N=83					Gave opinion (%)		Have heard of (%)		NON-UMD AFFILIATED - WITH KIDS/PLANS FOR KIDS N=105				
	% did not give opinion		Have heard of (%)	Have not heard of (%)	Very favorable (%)	Somewhat favorable (%)	Neutral (%)	Somewhat unfavorable (%)	Very unfavorable (%)	% did not give opinion		Have heard of (%)	Have not heard of (%)	Very favorable (%)	Somewhat favorable (%)	Neutral (%)	Somewhat unfavorable (%)	Very unfavorable (%)
Center for Young Children	96%	4%	81%	19%	58%	20%	14%	5%	3%	98%	2%	66%	34%	59%	21%	16%	1%	1%
College Park Nursery School	95%	5%	34%	66%	22%	44%	19%	15%	0%	98%	2%	64%	36%	33%	35%	24%	5%	2%
University Church Nursery School	96%	4%	13%	88%	40%	30%	30%	0%	0%	93%	7%	35%	65%	35%	44%	18%	3%	0%
Sunny Days Early Learning Center	96%	4%	33%	68%	42%	19%	31%	8%	0%	91%	9%	31%	69%	27%	33%	40%	0%	0%
USDA Small Wonders	95%	5%	25%	75%	20%	35%	45%	0%	0%	93%	7%	36%	64%	26%	34%	37%	3%	0%
NARA Easter Seals	98%	2%	21%	79%	24%	53%	18%	6%	0%	92%	8%	19%	81%	11%	33%	39%	11%	6%
Berwyn Christian School	94%	6%	13%	87%	20%	0%	60%	10%	10%	92%	8%	21%	79%	5%	10%	75%	5%	5%
Greenwood School	95%	5%	39%	61%	13%	45%	29%	6%	3%	96%	4%	51%	49%	50%	23%	17%	8%	2%
Greenbelt Nursery School	96%	4%	31%	69%	20%	40%	36%	4%	0%	95%	5%	33%	67%	27%	33%	30%	3%	6%
Greenbelt Children's Center	95%	5%	10%	90%	13%	38%	38%	13%	0%	93%	7%	11%	89%	27%	18%	45%	9%	0%
Childway	95%	5%	87%	13%	3%	9%	12%	1%	3%	95%	5%	20%	80%	10%	20%	35%	25%	10%
Heritage Learning Center	95%	5%	9%	91%	0%	43%	57%	0%	0%	95%	5%	11%	89%	18%	55%	27%	0%	0%
St. Jerome's Child Care	95%	5%	41%	59%	31%	34%	31%	0%	6%	93%	7%	54%	46%	23%	34%	28%	13%	2%
Greenway Learning Center	94%	6%	15%	85%	0%	17%	50%	0%	0%	93%	7%	12%	88%	8%	25%	42%	25%	0%
Paint Branch Montessori School	94%	6%	32%	68%	24%	32%	36%	4%	4%	91%	9%	31%	69%	23%	37%	30%	10%	0%
St. Matthews Episcopal Day School	96%	4%	15%	85%	25%	33%	42%	0%	0%	90%	10%	26%	74%	24%	20%	40%	16%	0%
Hyattsville Hills Child and Family Center	94%	6%	5%	95%	25%	25%	50%	0%	0%	93%	7%	16%	84%	19%	13%	56%	13%	0%

**UMD-AFFILIATED WITH KIDS/PLANS FOR KIDS
(OUTSIDE TARGET AREAS) N=174**

Crosstabs

Other schools	Gave opinion (%)		Have heard of (%)		Very favorable (%)				
	% did not give opinion		Have not heard of (%)		Somewhat favorable (%)	Neutral (%)	Somewhat unfavorable (%)	Very unfavorable (%)	
Center for Young Children	98%	2%	69%	31%	53%	25%	17%	4%	0%
College Park Nursery School	95%	5%	6%	94%	20%	30%	40%	10%	0%
University Church Nursery School	94%	6%	5%	95%	13%	38%	50%	0%	0%
Sunny Days Early Learning Center	95%	5%	5%	95%	33%	0%	33%	22%	11%
USDA Small Wonders	94%	6%	16%	84%	23%	38%	31%	8%	0%
NARA Easter Seals	95%	5%	10%	90%	18%	35%	41%	24%	6%
Berwyn Christian School	95%	5%	5%	95%	0%	11%	78%	11%	0%
Greenwood School	94%	6%	10%	90%	35%	35%	24%	6%	0%
Greenbelt Nursery School	96%	4%	4%	96%	0%	57%	29%	14%	0%
Greenbelt Children's Center	94%	6%	2%	98%	25%	25%	50%	0%	0%
Childway	94%	6%	5%	95%	0%	22%	22%	44%	11%
Heritage Learning Center	95%	5%	5%	95%	0%	25%	38%	38%	0%
St. Jerome's Child Care	94%	6%	7%	93%	9%	45%	36%	0%	9%
Greenway Learning Center	95%	5%	4%	96%	0%	50%	17%	17%	17%
Paint Branch Montessori School	95%	5%	10%	90%	6%	41%	53%	0%	0%
St. Matthews Episcopal Day School	95%	5%	3%	97%	20%	20%	40%	0%	20%
Hyattsville Hills Child and Family Center	94%	6%	5%	95%	13%	38%	50%	0%	0%

Crosstabs - other characteristics

UMD affiliated in target area - with
kids/plans to have kids N=83

Non-UMD-affiliated - with kids/plans
to have kids N=105

Child Care Center Characteristics (optionals section of survey)	Gave opinion (%)		Very important (%)					Gave opinion (%)		Very important (%)				
	% did not give opinion		Very important (%)	Somewhat important (%)	Neutral (%)	Somewhat unimportant (%)	Very unimportant (%)	% did not give opinion		Very important (%)	Somewhat important (%)	Neutral (%)	Somewhat unimportant (%)	Very unimportant (%)
I am provided with comprehensive reports about my child's development	92%	8%	30%	55%	8%	5%	1%	93%	7%	56%	37%	5%	2%	0%
The child care center has provisions for children with special needs	92%	8%	14%	33%	32%	14%	7%	94%	6%	17%	25%	38%	13%	17%
The center has activities that focus on social development	90%	10%	71%	28%	1%	0%	0%	94%	6%	76%	19%	3%	1%	1%
The center has activities that focus on academic development	92%	8%	46%	39%	8%	5%	1%	93%	7%	52%	32%	12%	4%	0%
The center has activities that focus on emotional development	92%	8%	59%	37%	4%	0%	0%	92%	8%	74%	22%	1%	2%	1%
The center has a specifically-gearred curriculum (STEM, the arts, etc.)	92%	8%	12%	29%	32%	20%	8%	93%	7%	16%	27%	43%	10%	4%
Activities include outdoor playtime	92%	8%	88%	12%	0%	0%	12%	94%	6%	67%	10%	1%	2%	0%
Outdoor play equipment is interesting (subset question)	100%	0%	41%	46%	8%	4%	1%	96%	4%	57%	35%	7%	1%	0%
Outdoor play equipment is safe and clean (subset question)	99%	1%	13%	1%	1%	0%	0%	96%	4%	85%	9%	4%	0%	1%
Nap time or quiet time is built into the daily schedule	92%	8%	61%	29%	8%	3%	0%	92%	8%	61%	24%	8%	6%	1%
Each child has their own space for nap or quiet time (subset question)	99%	1%	27%	46%	18%	7%	1%	84%	16%	43%	41%	16%	0%	0%
The child care center provides meals and/or snacks for my child	92%	8%	16%	30%	37%	7%	11%	91%	9%	25%	33%	30%	6%	5%
The child care center teaches language and vocabulary	90%	10%	49%	36%	12%	3%	0%	93%	7%	59%	31%	5%	1%	4%
The child care center teaches my child a foreign language	92%	8%	13%	41%	30%	8%	8%	93%	7%	19%	37%	29%	9%	6%
The child care center is owned by a nationally recognized child care provider	90%	10%	5%	12%	41%	16%	25%	93%	7%	3%	13%	39%	19%	3%
The child care center is managed by a local child care provider	90%	10%	8%	19%	48%	15%	11%	94%	6%	6%	34%	44%	7%	8%
The child care center is managed as a non-profit	89%	11%	14%	31%	43%	7%	5%	94%	6%	10%	30%	48%	6%	5%
Scholarships/awards to the child care center are available	90%	10%	23%	32%	33%	5%	7%	94%	6%	18%	31%	38%	5%	7%
The child care center communicates with parents about how children develop at different ages	90%	10%	44%	41%	11%	1%	3%	94%	6%	54%	35%	9%	0%	2%
The child care center communicates with parents about how their child is growing and developing	90%	10%	67%	29%	4%	0%	0%	94%	6%	76%	19%	2%	0%	3%
The child care center communicates with parents about how their child is doing in the program	90%	10%	77%	20%	3%	0%	0%	93%	7%	84%	14%	1%	1%	0%
The child care center informs parents about how to find other services in the community	89%	11%	19%	32%	36%	9%	3%	94%	6%	25%	41%	25%	5%	3%
Children at the child care center come from diverse backgrounds (financially or culturally)	89%	11%	35%	38%	23%	3%	1%	94%	6%	42%	35%	17%	3%	2%

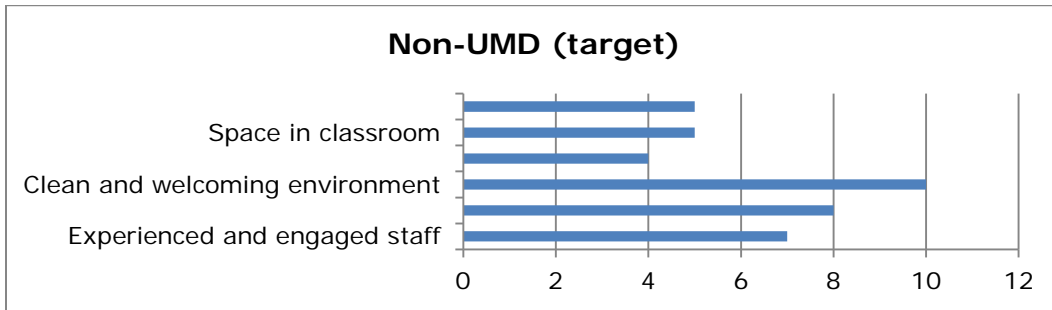
UMD-affiliated, with kids/plans to have kids (outside of target area)

N=174

Crosstabs - other characteristics

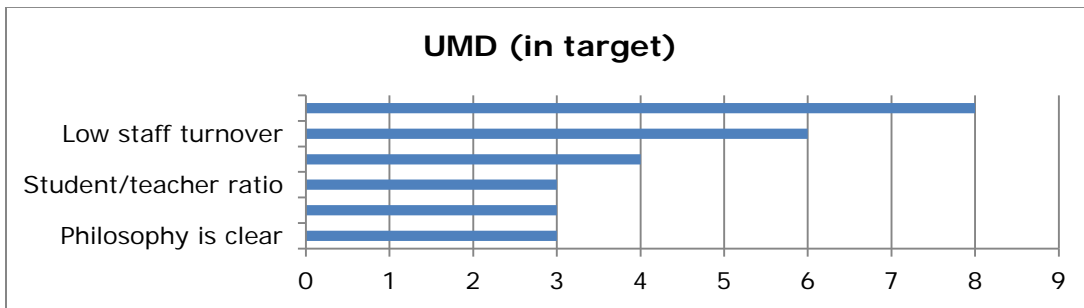
Child Care Center Characteristics (optionals section of survey)	Gave opinion (%)	% did not give opinion	Very important (%)	Somewhat important (%)	Neutral (%)	Somewhat unimportant (%)	Very unimportant (%)
I am provided with comprehensive reports about my child's development	95%	5%	55%	35%	8%	1%	0%
The child care center has provisions for children with special needs	95%	5%	20%	30%	35%	9%	6%
The center has activities that focus on social development	94%	6%	66%	30%	3%	1%	0%
The center has activities that focus on academic development	95%	5%	58%	34%	7%	1%	1%
The center has activities that focus on emotional development	92%	8%	59%	34%	6%	1%	0%
The center has a specifically-gear curriculum (STEM, the arts, etc.)	95%	5%	20%	28%	37%	11%	3%
Activities include outdoor playtime	95%	5%	82%	15%	1%	1%	1%
Outdoor play equipment is interesting (subset question)	100%	0%	44%	48%	8%	1%	0%
Outdoor play equipment is safe and clean (subset question)	99%	1%	87%	11%	2%	0%	0%
Nap time or quiet time is built into the daily schedule	95%	5%	64%	31%	3%	2%	0%
Each child has their own space for nap or quiet time (subset question)	100%	0%	53%	33%	12%	3%	0%
The child care center provides meals and/or snacks for my child	94%	6%	27%	39%	21%	8%	5%
The child care center teaches language and vocabulary	95%	5%	61%	30%	7%	2%	0%
The child care center teaches my child a foreign language	94%	6%	20%	30%	32%	11%	7%
The child care center is owned by a nationally recognized child care provider	94%	6%	17%	19%	44%	10%	9%
The child care center is managed by a local child care provider	91%	9%	11%	27%	46%	11%	6%
The child care center is managed as a non-profit	94%	6%	12%	24%	52%	7%	5%
Scholarships/awards to the child care center are available	94%	6%	24%	35%	32%	7%	2%
The child care center communicates with parents about how children develop at different ages	94%	6%	53%	34%	9%	3%	1%
The child care center communicates with parents about how their child is growing and developing	94%	6%	72%	23%	2%	1%	1%
The child care center communicates with parents about how their child is doing in the program	94%	6%	80%	18%	1%	1%	1%
The child care center informs parents about how to find other services in the community	94%	6%	24%	39%	27%	7%	4%
Children at the child care center come from diverse backgrounds (financially or culturally)	94%	6%	39%	29%	22%	5%	5%

What other important characteristics would people like to see in the child care center?



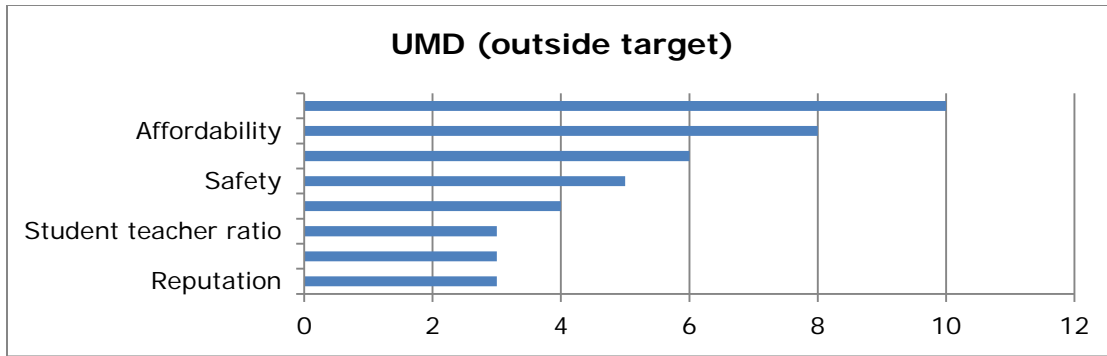
Other important characteristics people who were not affiliated with UMD but living in the target areas listed as important were:

- | | |
|---|----------------------------|
| Low staff turnover | Certified Staff |
| Healthy practices for meals, hand-washing, etc. | Proximity to work |
| Communications between center staff and parents | No waitlist/availability |
| Art/Music education | High-quality |
| Student/Teacher ratio | NAEYC accredited |
| Flexible Hours | Infant Care |
| Diversity | Not religiously affiliated |
| | Mixed-age groups |
| | Staff is paid well |



Other important characteristics people who were affiliated with UMD and living in the target areas listed as important are as follows:

- | | |
|--|--|
| A clean, welcoming environment | Availability/no waitlist |
| Certified staff | Drop-in care option |
| No "forced" financial/cultural diversity | High-quality |
| Vaccination policies that don't make vaccines optional | NAEYC accredited |
| Proximity to work | An inclement weather policy that follows UMD or the Federal Government and not PGCPs |
| Flexible hours | |
| Affordability | |



Other less popular, yet important, characteristics people affiliated with UMD but living outside of the target area mentioned:

- | | |
|------------------------------|-----------------------------|
| Certified staff | Availability/no waitlist |
| Proximity to work | Drop-in child care option |
| Accreditation | Infant/2 year old care |
| Eco-conscious | Program philosophy is clear |
| Drop-in nursing is available | |

What infant-specific characteristics are important to you?

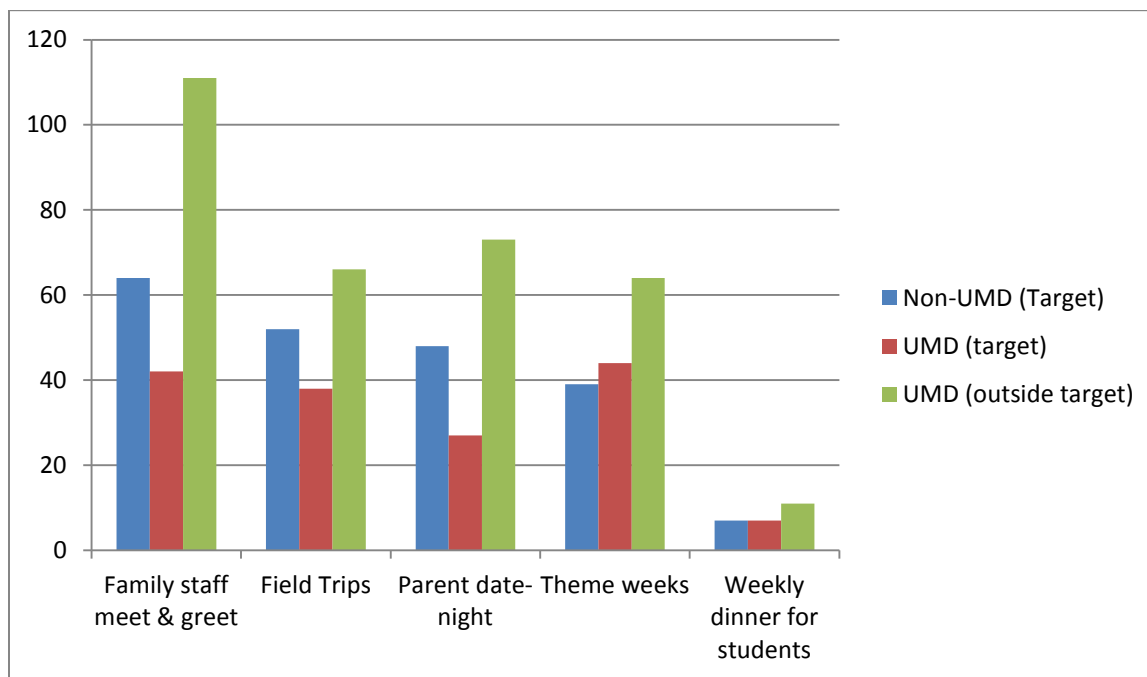
Non-UMD (in target area) N=59	Very important	Somewhat important	Neutral	Somewhat unimportant	Very unimportant
A flexible disposable/non-disposable diaper policy	31%	22%	36%	5%	7%
A center with vaccination policies	75%	14%	8%	3%	0%
A center with flexible vaccination polices (subset question)	6%	13%	12%	13%	56%
A freezer to store breast milk	66%	22%	7%	0%	5%
An Individual cribs for each infant	81%	16%	0%	0%	3%
Strict policy for sanitizing toys and surfaces	69%	20%	8%	2%	0%
Parents are allowed to drop-in to nurse or watch their infant	71%	15%	8%	0%	5%
A space/room dedicated to letting parents to nurse their infant	51%	31%	10%	2%	7%
The center provides daily feedback about each infant's day	63%	31%	5%	0%	2%

UMD (in target area) N=73	Very important	Somewhat important	Neutral	Somewhat unimportant	Very unimportant
A flexible disposable/non-disposable diaper policy	27%	25%	34%	5%	8%
A center with vaccination policies	63%	19%	12%	1%	4%
A center with flexible vaccination polices	3%	14%	22%	5%	50%
A freezer to store breast milk	43%	28%	21%	1%	7%
An Individual cribs for each infant	44%	34%	14%	6%	3%
Strict policy for sanitizing toys and	56%	29%	10%	4%	1%

surfaces					
Parents are allowed to drop-in to nurse or watch their infant	64%	28%	5%	1%	1%
A space/room dedicated to letting parents to nurse their infant	39%	45%	9%	3%	4%
The center provides daily feedback about each infant's day	49%	31%	11%	4%	6%

UMD (outside target)					
N=161	Very important	Somewhat important	Neutral	Somewhat unimportant	Very unimportant
A flexible disposable/non-disposable diaper policy	27%	25%	34%	5%	8%
A center with vaccination policies	73%	17%	8%	1%	1%
A center with flexible vaccination polices (subset)	11%	18%	18%	15%	38%
A freezer to store breast milk	48%	30%	15%	4%	2%
An Individual cribs for each infant	70%	17%	11%	2%	1%
Strict policy for sanitizing toys and surfaces	63%	27%	7%	2%	1%
Parents are allowed to drop-in to nurse or watch their infant	68%	22%	8%	2%	1%
A space/room dedicated to letting parents to nurse their infant	57%	28%	11%	4%	2%
The center provides daily feedback about each infant's day	58%	29%	8%	4%	1%

What program add-ons would you like to see in a child care center?



For those who would like to see a program host a weekly dinner for students, the majority would pay \$11-\$15 for the dinner.

For those who would like to see a parent-date night, the majority across all groups would like to have 2-3 hours for date night and would prefer to pay between \$10-\$20 per hour for the date night.

Some other options that were written in and were popular:

- Family holiday events
 - Music programs
-

CONCLUSIONS

(To be continued)

INITIAL SURVEY CONCLUSIONS

- People are generally satisfied or have no opinion with what they have across the board.
- People think it's important to have weekend hours available, but very few can commit to a schedule on weekends.
- Evening hours seem to be needed on a more regular basis than weekend care. Some people like the idea of a drop-in/back-up care option in the evening as opposed to a set schedule, for example: in order to teach a class or go to a meeting.
- Some of the most important characteristics – what determines satisfaction – in a child care center according to the survey are:
 - Staffing is extremely important – licensed, certified, engaged, experienced, take parent considerations into mind, low-turnover.
 - Outdoor play and general free-play.
 - Communication between the center and parents about children and their children in general.
 - Social and emotional characteristics were more important than academic or specific curricula – although the UMD crowd outside of the target areas were more inclined to like S.T.E.M education.
 - Reputation – most people find out about their child care through friends, family, neighbors and internet searches.
- Accreditation isn't as important as reputation.
- Affordability is important but quality – a clean, welcoming environment – was more important.
- Most people don't know what type of curriculum their child care provider is using.
- There isn't enough space for all of the children currently here and there certainly aren't enough spaces for the number of people having babies. This probably means there is room enough for more than one child care center in the College Park community.