North Dakota Child Care Provider Report, 2025

MARKET RATE SURVEY FINDINGS

NDSU CENTER FOR SOCIAL RESEARCH

AVRAM SLONE, NANCY HODUR, AND DEAN BANGSUND 01.19.2026

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Executive Summary

The Child Care and Development Fund is a joint state and federal program that provides assistance to low-income families for child care services through the North Dakota Child Care Assistance Program (CCAP). States also use the fund to support initiatives to enhance child care programs and help connect parents with appropriate child care providers. As part of the conditions for federal funding, state agencies that administer the program must submit a comprehensive State Plan every three years. As part of that plan agencies must submit market rate survey findings and a cost analysis. Findings from the market rate survey are used to set child care subsidies and ensure that the state max rate is adequate to support equitable choice and access to child care for recipient households. Findings from the narrow cost analysis are used to inform states' determination of payment rates. The cost analysis enables the examination of the gap between the actual cost of services and market rates when setting state max rates. North Dakota's most recent comprehensive State Plan was submitted in 2024 using financial data from 2022. The objective of this study is to provide an off-year supplement in order to bridge the gap between North Dakota's 2024 State Plan and the 2027 State Plan.

This study was conducted by the Center for Social Research (CSR) at NDSU in partnership with the ND Department of Health and Human Services. In February of 2025 a list of child care providers was pulled from the ND Child Care Licensing database resulting in a list of 1,124 licensed child care providers in North Dakota. The file was cleared of inactive licensed child care providers and duplicates, resulting in an initial distribution list of 1,026 providers.

In collaboration with CCAP, the Center for Social Research team developed a survey instrument to collect data on market rates and costs associated with child care operations. The survey was launched online on March 20, 2025 using Qualtrics online survey software, with personalized links for each provider, enabling response tracking. To encourage participation, a rigorous campaign of email reminders was conducted. In addition, Child Care Aware staff contacted providers who had not responded after multiple reminders by telephone to encourage participation. Finally, a paper survey was mailed to providers who had not yet responded on April 15, 2025. The mailing also contained a letter with a QR code for online completion. The survey was closed on May 19, 2025 after 61 days in the field. Between the personalized Qualtrics survey, the mailed paper copy, and the QR link included with the mailed paper copy, 387 providers participated in the survey, resulting in a 37.7 percent response rate. Data from 22 participants were excluded due to duplicate responses or an inability to identify the respondent.

Most providers (51.8 percent) who responded to the survey were from urban areas as compared to semiurban or rural areas (28.5 percent and 19.7 percent, respectively). Reponses came from facilities in 47 of North Dakota's 53 counties. Nearly two-thirds (64.3 percent) of responses came from family/group facilities (family child care and group child care in homes and facilities), and just over one-third (35.7 percent) came from center facilities (child care centers, preschools, school age care, and multiple license centers). Nearly half (45.4 percent) of responding providers operated their facility out of their home.

Statewide, most licensed child care providers operated at relatively small capacities. Half of providers were licensed for 18 children or less, while the average licensed capacity was 44. Larger facilities were less common, with only 25 percent of providers licensed to serve 62 or more children. Facilities carrying center license types had much higher capacities than facilities carrying family/group license types. The average capacity of center facilities was 95.6 students, compared to 16 for family/group facilities. Across regional designations, urban

providers had the highest average licensed capacity (53.9 students), followed by semiurban providers and rural providers. Most respondent child care centers were approaching capacity in their programs. Average utilization rates were similar at facilities with center and family/group license types (74.3 percent and 74.8 percent, respectively). Mean utilization rates were higher for rural facilities (81.5 percent) than they were in semiurban (74.7 percent) or urban (72.4 percent) facilities. Most facilities (73.7 percent) had at least one vacancy, but at least one quarter of rural facilities and family/group facilities functioned at a full (100 percent) utilization rate.

A majority of providers offered care to infants, toddlers, preschool-age children, and school-age children. The vast majority of providers (93.7 percent of center facilities and 99.6 percent of family/group facilities) offered full-time care. However, just over half of providers (60.3 percent of center facilities and 55 percent of family/group facilities) offered part-time care. Most respondents (88.8 percent) were open for business on Monday through Friday. Facilities generally opened and closed for business at the same time every day that they were open, usually opening between 7am and 8am and closing between 5pm and 6pm.

Most facilities accepted students with special needs. Ninety-five percent of center facilities and 78.1 percent of family/group facilities accepted special needs students. However, center facilities were much more likely to enroll special needs students (78.3 percent) than family/group facilities (28.4 percent).

In general, full-time rates for child care at center facilities were higher than full-time rates for child care at family/group facilities, and for both types of facilities rates were higher for younger children. The highest rates were for full-time infants at center facilities ($1,038 per month on average) and the lowest rates were for full-time school age children at family/group facilities ($668 per month on average). Rates were generally higher in urban counties than they were in semiurban and rural counties. This was also the case for part-time rates.

Nearly half of all providers (49.6 percent) reported employing both full-time and part-time staff. A slightly smaller percentage (43.9 percent) reported employing only full-time staff, and 6.5 percent reported employing only part-time staff. Child care facilities relied primarily on full-time staff, particularly in leadership and instructional roles while using part-time staff to support classroom operations and facility needs. About a third of facilities employed administrative staff (30 percent) and less than a quarter of facilities employed classroom assistants (23.8 percent). The most frequently reported staff type for part-time staff was classroom assistants (28.5 percent) followed by teachers (22.9 percent).

Most child care facilities operated with a very small number of staff. The average number of staff members per employer was nine, and the median was three. Just over 4 in 10 (43.3 percent) respondent facilities offered fringe benefits to full-time staff members. Fringe benefits were less frequently offered to part-time staff members, at less than 1 in 5 (18 percent) respondent facilities. At facilities where fringe benefits were offered, the most frequently offered fringe benefit for both full-time and part-time staff was paid time off, which was offered to full-time staff at 87.4 percent of facilities and to part-time staff at 60.6 percent of facilities. Although health insurance was the second most frequently offered fringe benefit for full-time staff (49.1 percent), it was the least frequently offered fringe benefit for part-time staff (15.2 percent).

Background

The Child Care and Development Fund is a joint state and federal program that provides assistance to low-income families for child care services through CCAP. States also use the fund to support initiatives to enhance child care program quality and help connect parents with appropriate child care providers. As part of the conditions for federal funding, state agencies that administer the program must submit a comprehensive State Plan every three years. As part of that plan agencies must submit market rate survey findings and a narrow cost analysis. Findings from the market rate survey are used to set child care subsidies and ensure that state max rates are adequate to ensure equitable choice and access to child care for recipient households. The state max rate is the highest amount that CCAP will pay toward a child's care. If a provider's cost of care is more than the state max rate, families may be responsible for paying the remaining balance. The state max rate does not set or limit the rate a provider may charge. Findings from the cost analysis are used to inform states' determination of payment rates. The cost analysis enables the examination of the gap between the actual cost of services and market rates. North Dakota's most recent comprehensive State Plan was submitted in 2024 using financial data from 2022. The objective of this study is to provide an off-year supplement in order to bridge the gap between North Dakota's 2024 State Plan and the 2027 State Plan.

The Center for Social Research at NDSU was contracted by CCAP in winter 2024 to conduct its annual market rate survey to determine state max rates for participants in the Child Care Assistance Program. This rate determination process is overseen by the federal government and administered by the state, using data gathered from child care providers to calculate the best-fitting reimbursements for parents who require assistance to afford child care.

The Child Care Assistance Program pays a portion of child care costs for eligible families. Eligibility criteria include: employment or enrollment in an education program; temporary allowable activity such as job search (in situations of homelessness); age limits; and asset (including income) limits. If a family meets the eligibility criteria, payments are made to the provider. State max rates are determined by license type and age of child. Center license types (C, E, K, and M) are aggregated to estimate rates and costs for Center providers. Family and Group License types (F, G, and H) are aggregated to estimate rates and costs for "Family/Group" providers. See Appendix A for more details.

Methodology

In collaboration with CCAP, the Center for Social Research team developed a survey instrument to collect data on market rates and costs associated with child care operations (Appendix B: Survey Instrument). The questionnaire was modeled after the questionnaire used in the previous assessment following a period of internal review and input from CCAP.

In February of 2025 a list of child care providers was pulled from the ND Child Care Licensing database resulting in a list of 1,026 licensed child care providers in North Dakota (Table 1). The three license types most frequently found in the original list were Group License – Facility (G), and Group License Home (H), and Family (F). The license types that accounted for the most survey responses were G, Center (C), and H.

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Table 1: License Types and Responses by License, Annual Market Rate Survey, 2025

Type of Child Care License	License Suffix	Original Survey List	Survey Response Count
Center			
Center License	C	132	59
Preschool License	E	25	8
School Age License	K	18	18
Multiple License	M	86	46
Family/Group			
Family License	F	166	53
Group License-Facility	G	451	125
Group License - Home	H	148	56
Grand Total		**1,026**	**365**

The survey was launched online on March 20, 2025 using Qualtrics online survey software, with personalized links for each provider, enabling response tracking. To encourage participation, a rigorous campaign of email reminders was conducted. In addition, Child Care Aware staff contacted providers who had not responded after multiple reminders by telephone to encourage participation. Finally, a paper survey was mailed to providers who had not yet responded on April 15, 2025. The mailing also contained a letter with a QR code for online completion. The survey was closed on May 19, 2025 after 61 days in the field. Between the personalized Qualtrics survey, the mailed paper copy, and the QR link included with the mailed paper copy, 387 providers participated in the survey, resulting in a 37.7 percent response rate. Data from 22 participants were excluded due to duplicate responses or an inability to identify the respondent. Incomplete surveys were used in analyses when the responses they provided were deemed reliable.

Analysis

Data sets were downloaded from Qualtrics. Surveys completed via the individualized links were downloaded in one batch, and surveys completed either in paper format before being input into Qualtrics or via the anonymous QR code were downloaded in a separate batch. Batches were combined in Microsoft Excel to create a single data set. Duplicate responses and any anonymous responses that could not be confirmed from an existing provider were not included in the analysis. Analysis of the remaining data set was conducted using STATA 19 and Microsoft Excel.

Survey respondents were given the option of providing rates using various rate schedules: hourly, daily, weekly, and monthly. The rates were normalized to a monthly rate as follows:
<u>Full-Time Rates</u>
- Full-time rates on a monthly fee schedule were unchanged.
- Full-time rates on a weekly fee schedule were multiplied by four.
- Full-time rates on a daily fee schedule were multiplied by the number of days the facility was open per week, and then multiplied by four.
- Full-time rates on an hourly fee schedule were multiplied by the number of hours a facility was open per week, and then multiplied by four.

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Part-Time Rates[1]
- Part-time rates on a monthly fee schedule were unchanged.
- Part-time rates on a weekly fee schedule were multiplied by four.
- Part-time rates on a daily fee schedule were multiplied by the number of days the facility was open per week, and then multiplied by four.
- Part-time rates on an hourly fee schedule were multiplied by 100.

Statistics in the body of the report are generally reported at the mean, median, and 75th percentile. The mean refers to the average, calculated by summing all responses and dividing by the number of providers who responded to that question. The median refers to the 50th percentile, where half of the responding providers are below that value, and half are above. The 75th percentile refers to the point at which 75 percent of providers are below that value, and 25 percent of providers are above.

Provider Demographics

Most providers (51.8 percent) who responded to the survey were from urban areas[2] as compared to semiurban or rural areas (28.5 percent and 19.7 percent, respectively) (Figure 1). Reponses came from facilities in 47 of North Dakota's 53 counties. The counties from which there were no respondent facilities were Burke, Dunn, Renville, Sheridan, Sioux, and Slope. The counties that contained the most respondents were Cass, Burleigh, Grand Forks, and Ward (Table 2).

Figure 1: Regional Designation of Respondent Child Care Facilities, Annual Market Rate Survey, 2025

n = 365

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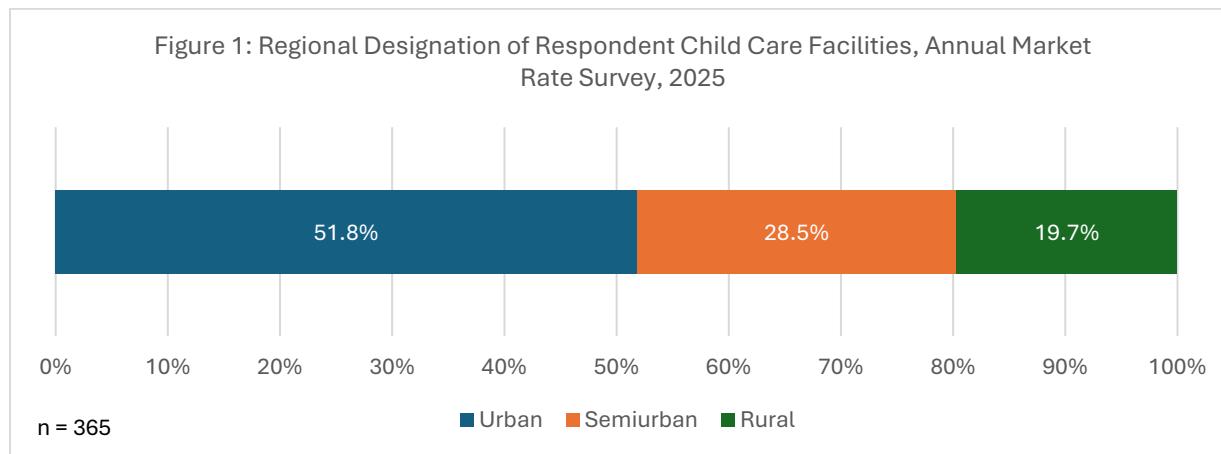
[1] Normalized part-time rates are based on our best estimate of the usage of part-time care. Some providers do have monthly pay schedules for part-time care. However, creating normalized monthly part-time rates for providers that use weekly, daily, or hourly schedules for part-time care requires assuming a certain number of weeks, days, or hours that families use part-time care respectively. Most providers who offer part-time care use an hourly rate for part-time care. We assume 25 hours per week, and therefore 100 hours per month, of care for part-time students. We also assume daily use for part-time care on a daily pay schedule and weekly use for part-time care on a weekly schedule.

[2] Urban, semiurban, and rural designations are based on Rural-Urban Continuum Codes developed by the United States Department of Agriculture, Economic Research Service and Presented in "North Dakota Primary Care Office Needs Assessment" published by the UND Center for Rural Health in March 2021.

Table 2: Respondents by County, Annual Market Rate Survey, 2025

County	Original Survey List	Number of Respondents
Adams	3	1
Barnes	9	5
Benson	5	1
Billings	3	1
Bottineau	17	6
Bowman	7	3
Burke	2	0
Burleigh	104	44
Cass	278	95
Cavalier	3	1
Dickey	10	2
Divide	2	3
Dunn	3	0
Eddy	6	1
Emmons	9	3
Foster	6	2
Golden Valley	4	1
Grand Forks	93	32
Grant	5	1
Griggs	4	2
Hettinger	3	2
Kidder	3	2
LaMoure	5	4
Logan	2	3
McHenry	7	3
McIntosh	4	3
McKenzie	7	3
McLean	9	1
Mercer	8	1
Morton	43	15
Mountrail	6	2
Nelson	4	1
Oliver	2	3
Pembina	7	5
Pierce	9	6
Ramsey	23	9
Ransom	11	3
Renville	2	0
Richland	37	17
Rolette	7	2
Sargent	4	4
Sheridan	1	0
Sioux	0	0
Slope	0	0
Stark	33	10
Steele	3	1
Stutsman	44	11
Towner	2	1
Traill	11	1
Walsh	16	7
Ward	94	25
Wells	6	3
Williams	40	13
Total	1,026	365

There are seven license types with distinct specifications. However, for the sake of analysis these license types are placed into two groups: center licenses (child care centers (C), preschools (E), school age care (K), and multiple license centers (M)) and family/group licenses (family child care (F), group child care in homes (G), and facilities (H)). Nearly two-thirds (64.3 percent) of responses came from family/group facilities, and just over one-third (35.7 percent) came from center facilities (Figure 2).

Figure 2: Percentage of Respondents by Combined License Type, Annual Market Rate Survey, 2025

35.7%	64.3%

n = 364   ■ Center Licenses   ■ Family Licenses
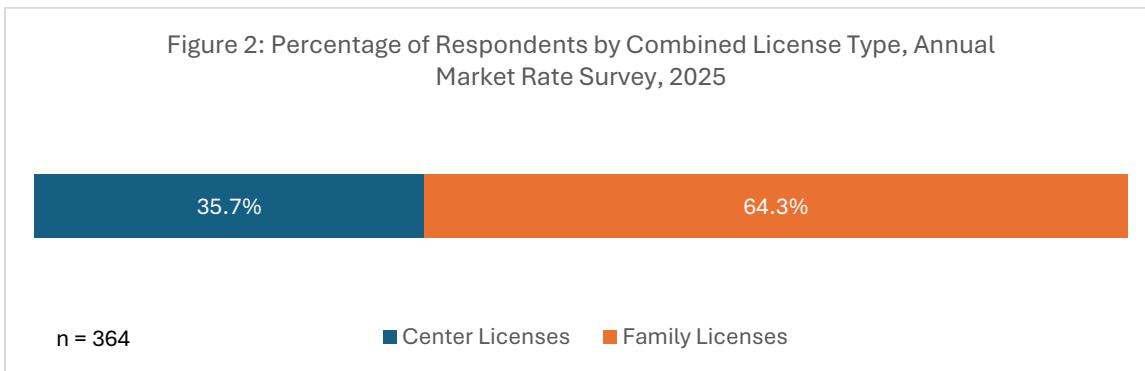
Business liability insurance was carried by 83.7 percent of respondents overall (Figure 3). Facilities with larger licensed capacities were more likely to carry liability insurance. (Table 3). Almost two-thirds of small facilities (capacity of 10 or fewer) carried business liability insurance (65 percent), compared to 100 percent of large facilities (capacity over 30) (Table 4). Facilities with center license types were more likely to carry business liability insurance than facilities with family/group license types (99.2 percent compared to 74.8 percent) and rural facilities were more likely to carry business liability insurance than urban or semiurban facilities (94 percent, 81 percent, and 81.2 percent, respectively).

Figure 3: Percentage of Respondents Carrying Business Liability Insurance, Annual Market Rate Survey, 2025

Yes 83.7%	No 16.3%

n= 338
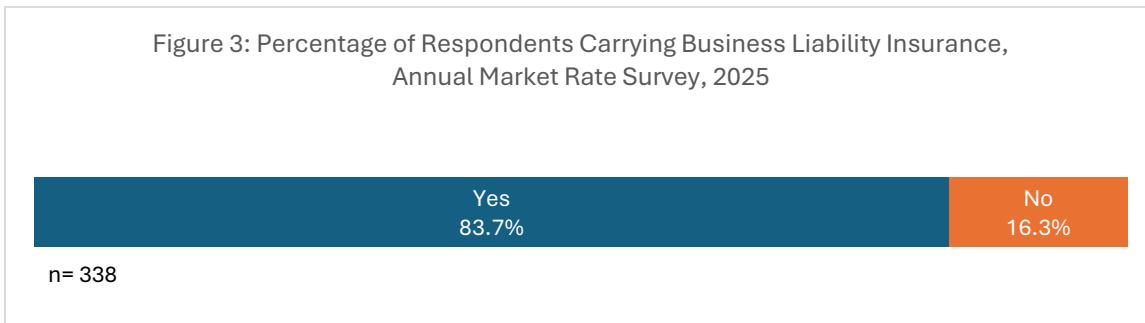
Table 3: Business Liability Insurance Status by Licensed Capacity, License Type, and Regional Designation, Annual Market Rate Survey, 2025

		Providers Carrying Business Liability Insurance	Count (n)
Licensed capacity	10 or Fewer	65%	60
	11 to 15	70.6%	85
	16 to 20	78.8%	33
	21 to 30	95.5%	44
	More than 30	100%	116
License Type	Center	99.2%	121
	Family/Group	74.8%	214
Regional Designation	Urban	81%	168
	Semiurban	81.2%	101
	Rural	94%	67

Capacity, Utilization, Vacancy, and Enrollment

Generally speaking, facilities with center license types had much higher licensed capacities than those with family/group license types, and urban facilities had higher licensed capacities than semirural or rural facilities (Table 4). The same was generally true for desired capacities, although notably across groups facilities indicated a lower total desired capacity than their current total licensed capacity. The mean utilization of respondent facilities was 75 percent, meaning that on average, facilities that responded to the survey were operating at 75 percent of capacity. Average utilization at center and family/group type facilities, as well as urban and semiurban facilities, was close to the average overall utilization. Mean utilization rates were higher for rural facilities (81.5 percent) than they were in semiurban (74.7 percent) or urban (72.4 percent) facilities Although most facilities (74.8 percent) had at least one vacancy (Figure 4), at least one quarter of rural facilities and family/group facilities functioned at 100 percent utilization.

Table 4: Total Licensed Capacity, Desired Capacity, and Utilization, by Provider Characteristics, Annual Market Rate Survey, 2025

		Total Licensed Capacity			Total Desired Capacity			Utilization		
		Mean	Median	75th Percentile	Mean	Median	75th Percentile	Mean	Median	75th Percentile
Overall		44	18	62	37.5	16	50	75%	76.7%	100%
License Type	Center	95.6	79	114	79	75	96	74.3%	76%	94.2%
	Family/Group	16	12	18	14.9	10	17.5	74.8%	75.7%	100%
Regional Designation	Urban	53.9	14	87.5	45.2	12	75	72.4%	72.5%	94.9%
	Semiurban	35.9	18	50	29.1	15.5	36	74.7%	71.5%	94.8%
	Rural	31.2	25.5	30	30.1	24	30	81.5%	88.9%	100%

Figure 4: Percentage of Respondents with Any Vacancy, Annual Market Rate Survey, 2025

| 1 or More Vacancies 74.8% | No Vacancies 25.2% |

n= 365
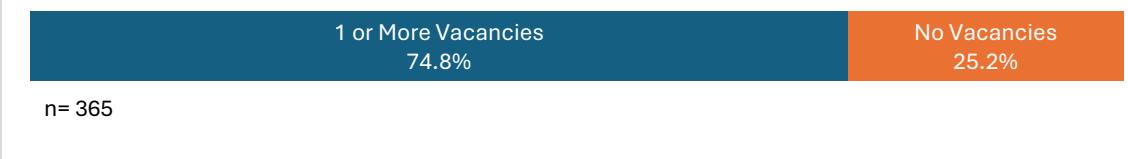
Facilities carrying center license types provide care across all age groups, both full time and part time, but mostly enroll preschoolers. At center-based facilities that enrolled preschool age children, average enrollment consisted of 31.4 full-time and 11.6 part-time preschool age children (Table 5). Full-time enrollment was lower in the younger age groups, averaging 15.2 infants and 19.4 toddlers. Center programs also enrolled an average of 21.9 school age children. Center facilities were less likely to enroll infants and toddlers part time.

Family/Group license type facilities also mostly enrolled preschool age children full time (4.4 children on average). Family/Group facilities were even less likely than center facilities to enroll part time, in any age group. Average part-time enrollment for family/group providers was very small, with the largest age group for part-time enrollment being school age (2 children) (Table 5).

Table 5: Full-Time and Part-Time Enrollment for Child Care Facilities by License Type Among Facilities That Enroll Each Age Group, Annual Market Rate Survey, 2025

Age Group		Center Facilities		Family/Group Facilities	
		Full-time Enrollment	Part-time Enrollment	Full-time Enrollment	Part-time Enrollment
Infant	Mean	15.2	0.8	2.1	0.5
	Median	9	0	2	0
	75th Percentile	18	1	3	1
	Count (n)	90	45	204	118
Toddler	Mean	19.4	3.7	2.9	0.8
	Median	13	0	2	0
	75th Percentile	23	1	4	1
	Count (n)	93	46	218	122
Preschool	Mean	31.4	11.6	4.4	1.4
	Median	21	3	4	0
	75th Percentile	40	15	6	2
	Count (n)	101	60	217	123
School Age	Mean	21.9	8.5	1.8	2
	Median	15	3	1	1
	75th Percentile	31	12	3	3
	Count (n)	91	53	159	101

Across regional designations, the age group with the highest average full-time enrollment was preschool (16.6 children at urban facilities, 10.3 at semiurban facilities, and 8.9 at rural facilities) (Table 6). Preschool was also the age with the highest average part-time enrollment at urban and semiurban facilities (6.3 and 4.2 children, respectively), but at rural facilities school age was the age group with the highest average part-time enrollment (3.8 children).

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Table 6: Full-Time and Part-Time Enrollment for Child Care Facilities by Regional Designation Among Facilities That Enroll Each Age Group, Annual Market Rate Survey, 2025

Age Group		Urban Facilities		Semiurban Facilities		Rural Facilities	
		Full-time Enrollment	Part-time Enrollment	Full-time Enrollment	Part-time Enrollment	Full-time Enrollment	Part-time Enrollment
Infant	Mean	8.3	0.7	4.4	0.4	4	0.5
	Median	2	0	2	0	2.5	0
	75th Percentile	8	1	6	1	5	1
	Count (n)	138	70	92	44	66	49
Toddler	Mean	10.2	2.6	5.7	0.7	5.6	0.9
	Median	3	0	3	0	4	0
	75th Percentile	10	1	8	1	7.5	1
	Count (n)	150	73	96	45	68	50
Preschool	Mean	16.6	6.3	10.3	4.2	8.9	3
	Median	4	0	5	1	7	1
	75th Percentile	20	4	12	4	14	4
	Count (n)	150	78	98	51	73	54
School Age	Mean	15.6	5.6	3.8	2.4	3.5	3.8
	Median	3	1	2	0.5	1.5	1
	75th Percentile	22	5.5	5	3.5	4	5
	Count (n)	114	68	75	40	62	46

Age Groups, Care Offered, Special Needs Accessibility and Training, Schedules, and Wait Lists

A majority of providers offered care to infants, toddlers, preschool-age children, and school-age children. Center facilities most commonly served preschool-age children (84.6 percent). Family/Group facilities most commonly served toddlers (94.9 percent) and preschoolers (94.4 percent). The age group least commonly served by both center and family/group providers was school-age (71.5 percent of center facilities and 69.7 percent of family/group facilities) (Figure 5). Preschool children were the most commonly served age group across regional designations, while school-age children were the least commonly served. Preschoolers were served at 83.6 percent of urban facilities, 98.1 percent of semiurban facilities, and 94.9 percent of rural facilities. School-age children were served at 63 percent of urban facilities, 73.1 percent of semiurban facilities, and 79.8 percent of rural facilities (Figure 6).

Figure 5: Percentage of Center and Family/Group Facilities by Age Group Served, Annual Market Rate Survey, 2025

Age Group	Center (n = 130)	Family/Group (n = 234)
Infants	70.8	88.9
Toddlers	72.3	94.9
Preschool	84.6	94.4
School Age	71.5	69.7
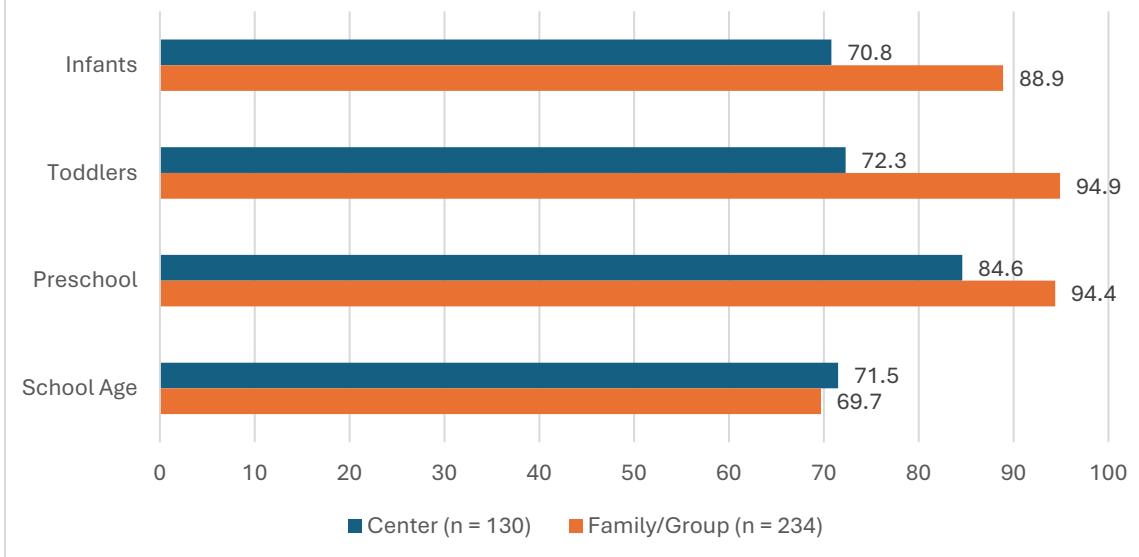
Figure 6: Percentage of Urban, Semiurban, and Rural Facilities by Age Group Served, Annual Market Rate Survey, 2024

Age Group	Urban (n = 189)	Semiurban (n = 104)	Rural (n = 79)
Infants	75.7	89.4	86.1
Toddlers	81.5	93.3	88.6
Preschool	83.6	98.1	94.9
School Age	63	73.1	79.8
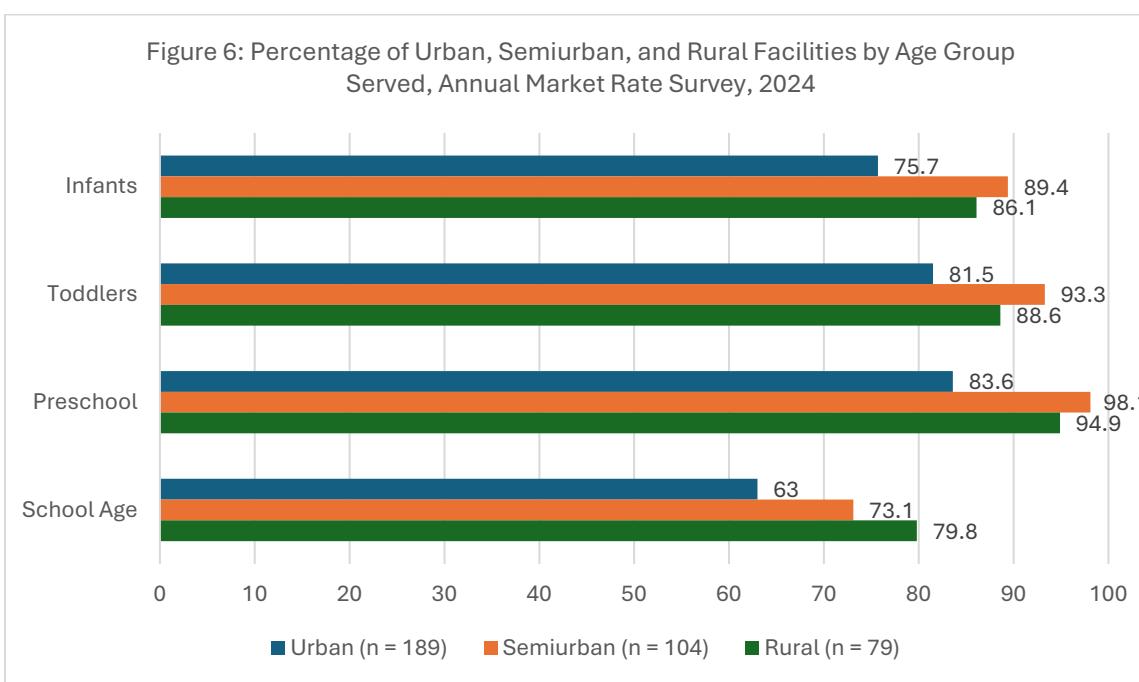
Most providers offered both full-time and part-time care, with the vast majority offering at least full-time care. Nearly all (93.7 percent) center facilities offered full-time care only or both full-time and part-time care. At family/group facilities, that percentage was even higher (99.6 percent) (Figure 7). This was also true across regional designations (97.3 percent at urban facilities, 97.1 percent at semiurban facilities, and 98.7 percent at rural facilities) (Figure 8).

Figure 7: Percentage of Center and Family/Group Facilities by Care Schedule Offered, Annual Market Rate Survey, 2025

Facility	Full Time Only	Both Full and Part Time	Part Time Only
Center (n=126)	39.7%	54%	
Family/Group (n=229)	45%	54.6%	

Legend: ■ Full Time Only ■ Both Full and Part Time ■ Part Time Only
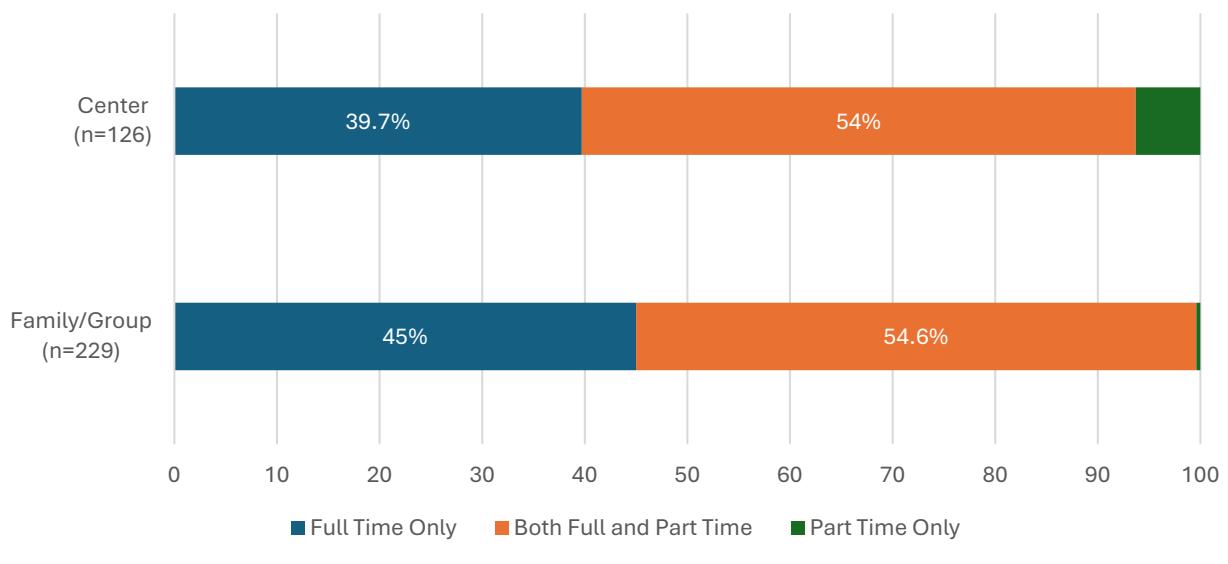
Figure 8: Percentage of Urban, Semiurban, and Rural Facilities by Care Schedule Offered, Annual Market Rate Survey, 2025

Location	Full Time Only	Both Full and Part Time	Part Time Only
Urban (n=181)	47%	50.3%	
Semiurban (n=103)	49.5%	47.6%	
Rural (n=76)	26.3%	72.4%	

Legend: ■ Full Time Only ■ Both Full and Part Time ■ Part Time Only

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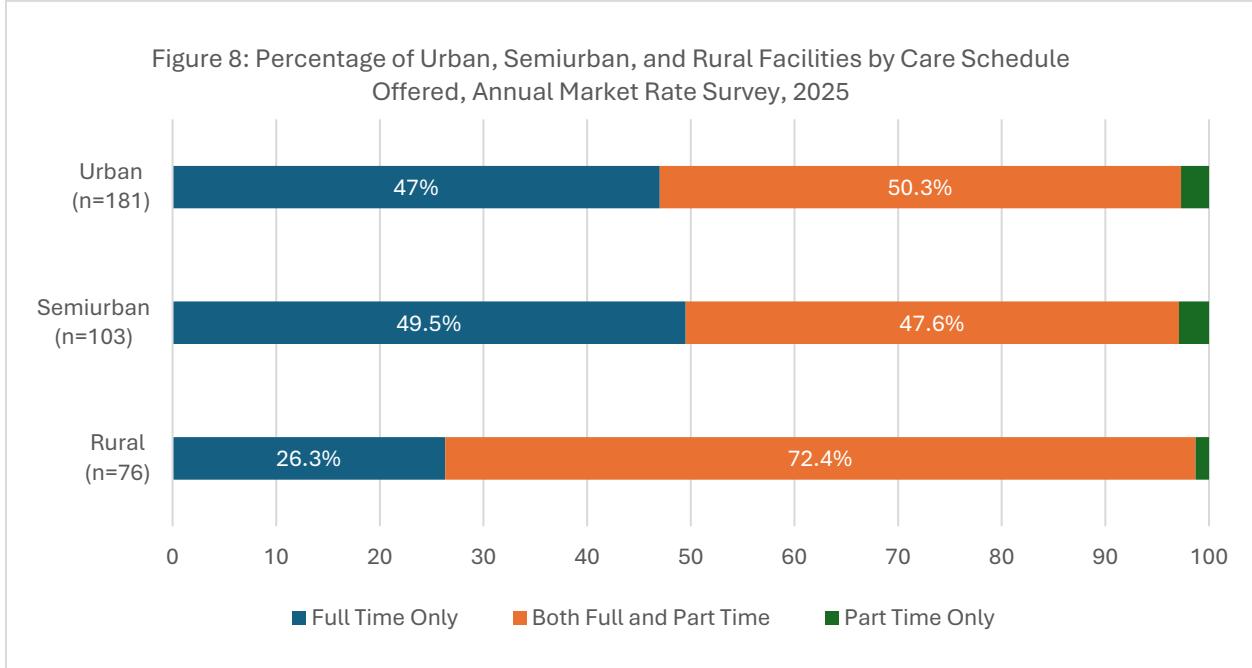
Most facilities accept students with special needs. Ninety-five percent of center facilities and 78.1 percent of family/group facilities accepted special needs students (Figure 9). However, center facilities were more likely to enroll special needs students (78.3 percent) than family/group facilities (28.4 percent). Across regional designations, more than 4 in 5 facilities accepted special needs students (83.9 percent at urban facilities, 83.3 percent at semiurban facilities, and 85.7 percent at rural facilities) (Figure 10). However, special needs students were more likely to be enrolled at urban facilities than they were at semiurban or rural facilities (50 percent at urban facilities, compared to 42.2 percent and 41.7 percent at semiurban and rural facilities, respectively).

Figure 9: Percentage of Center and Family/Group Facilities That Accept and Currently Enroll Special Needs Students, Annual Market Rate Survey, 2025

Facility	Accepts Special Needs	Special Needs Currently Enrolled
Center (n = 121)	95%	78.3%
Family/Group (n = 218)	78.1%	28.4%
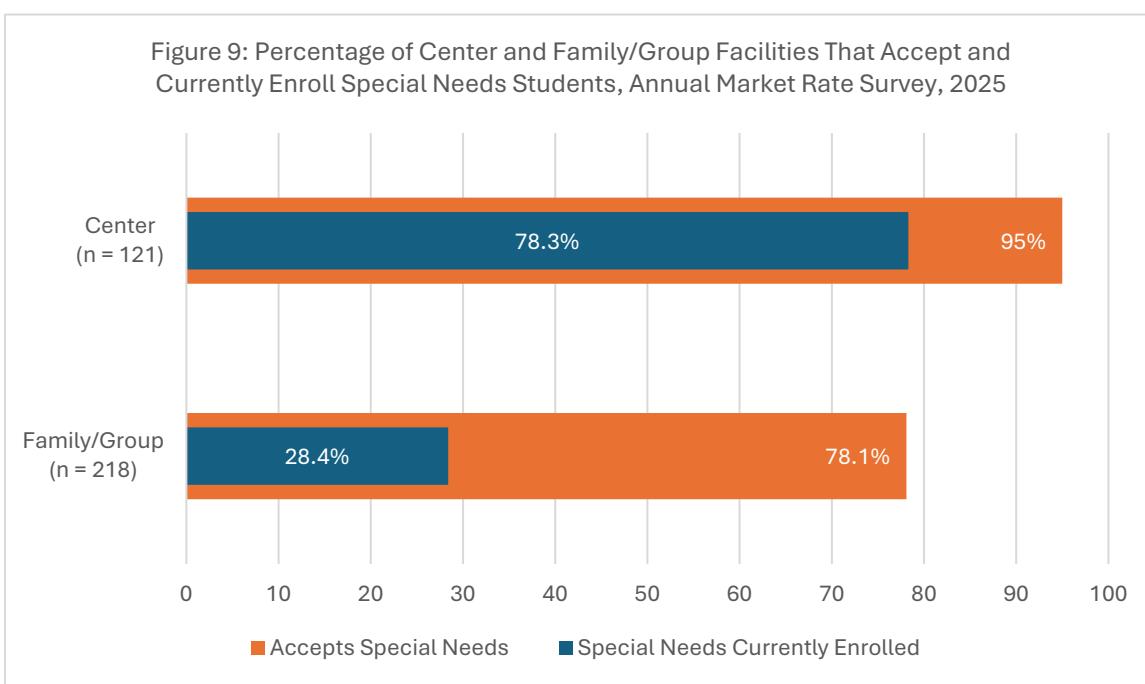
Figure 10: Percentage of Urban, Semiurban, and Rural Facilities That Accept and Currently Enroll Special Needs Students, Annual Market Rate Survey, 2025

Facility	Accepts Special Needs	Special Needs Currently Enrolled
Urban (n = 168)	83.9%	50%
Semiurban (n = 102)	83.3%	42.2%
Rural (n = 70)	85.7%	41.7%
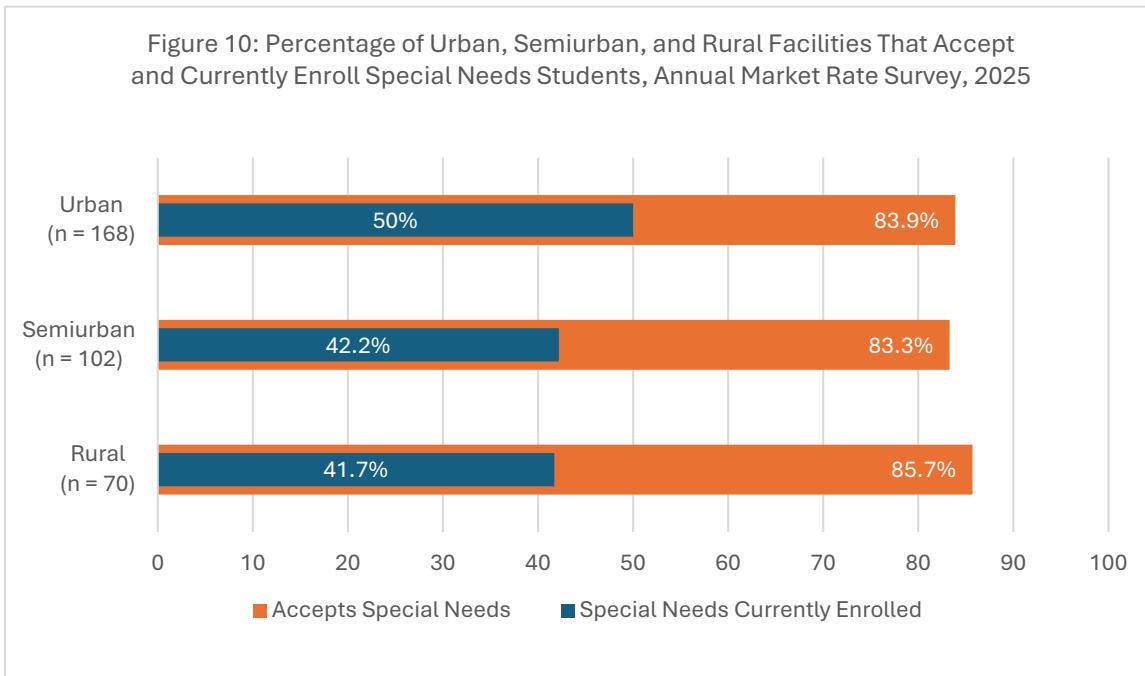
The types of special needs training and experience held by respondent facilities' staff varied (Figure 11). Nearly half (41.4 percent) of respondent facilities had staff with specialized training or experience with ADHD/ADD, followed by Developmental Delay (37.8 percent) and Emotional/Behavioral Needs (37.6 percent). Facilities were least likely to have staff with special needs training and experience with Visual Needs (8.6 percent), Monitors (5.4 percent), and HIV/Hepatitis B (1.6 percent).

Figure 11: Percentage of Facilities with Staff Training and/or Experience in Special Needs Areas, Annual Market Rate Survey, 2025
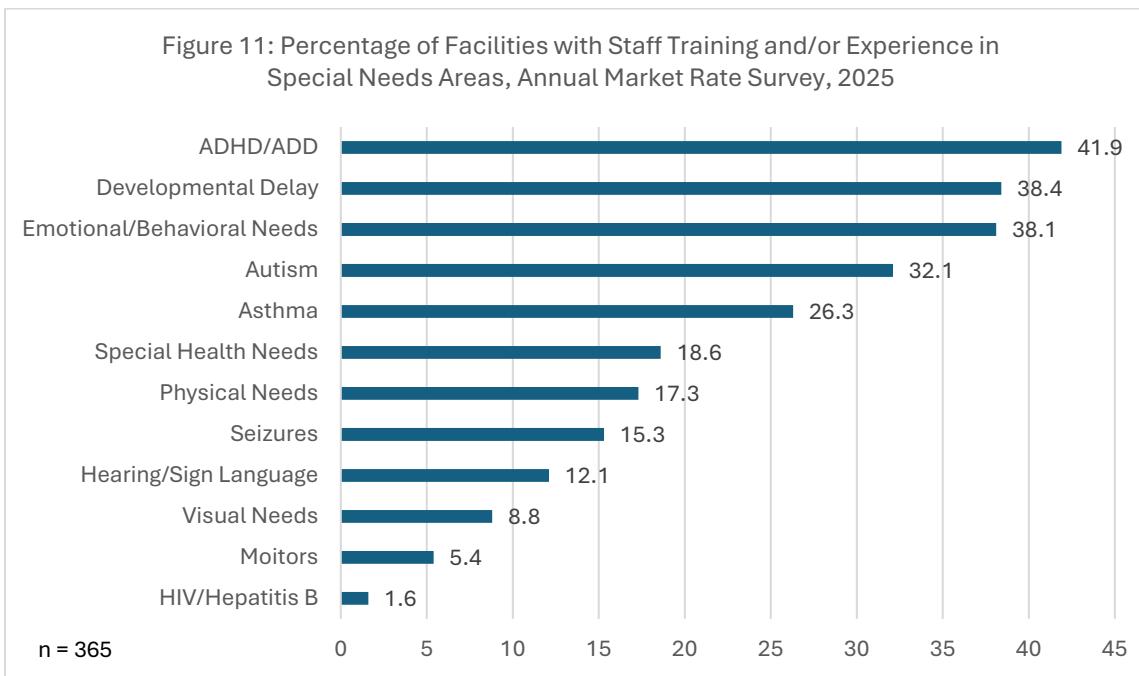
In addition to full-time and part-time care, nearly 3 in 4 (73 percent) respondents offered after school care, nearly 6 in 10 (57 percent) offered before school care, and more than half (53.6 percent) offered drop-in care. Some respondents offered emergency care, weekend care, and overnight care, but this was less common (see Figure 12).

Figure 12: Percentage of Respondents Offering Special Care Options, Annual Market Rate Survey, 2025

n = 330
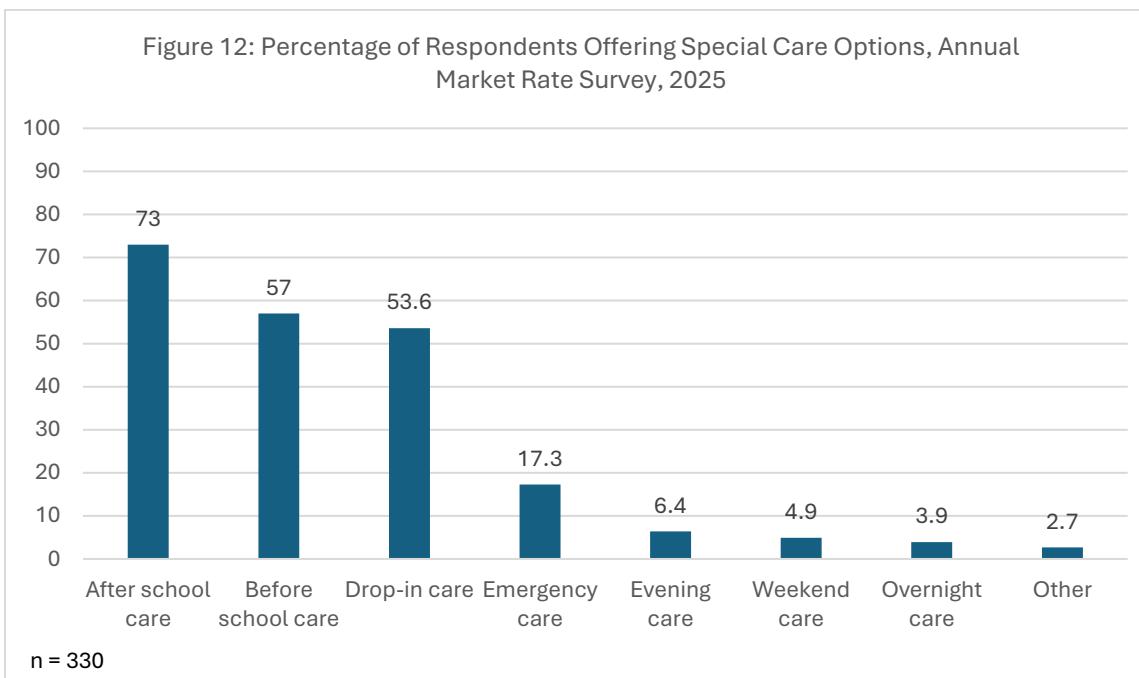
Most respondents (89.3 percent) offered care year-round. However, nearly 1 in 10 (8.2 percent) only offered care during the school year, and a single respondent (0.3 percent) only offered care during the summer (Figure 13).

Figure 13: Percentage of Respondents by Annual Care Schedule Offered, Annual Market Rate Survey, 2025

n = 356
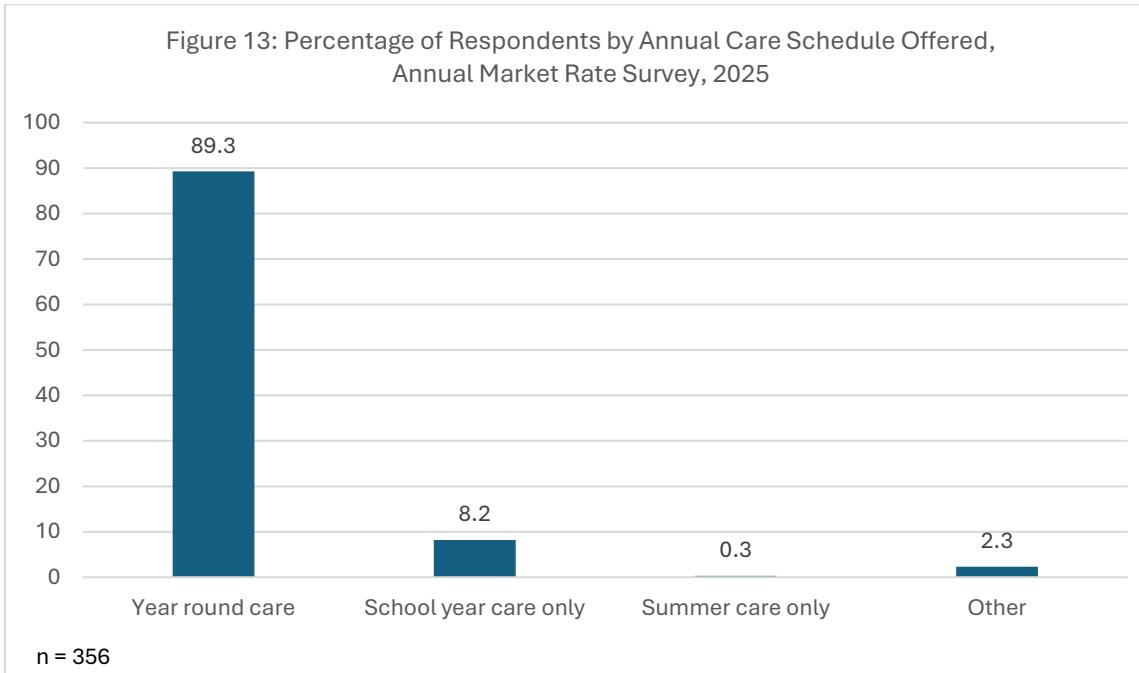
Although schedules varied slightly, most respondents (88.8 percent) were open for business five days per week: Monday through Friday. Facilities generally opened for business at the same time every day that they were open, almost always between 7am and 8am (Figure 14). However, there was somewhat more variation in opening times on weekends among those few facilities that were open on weekends.

Figure 14: Percentage of Respondents by Opening Times, Annual Market Rate Survey, 2025
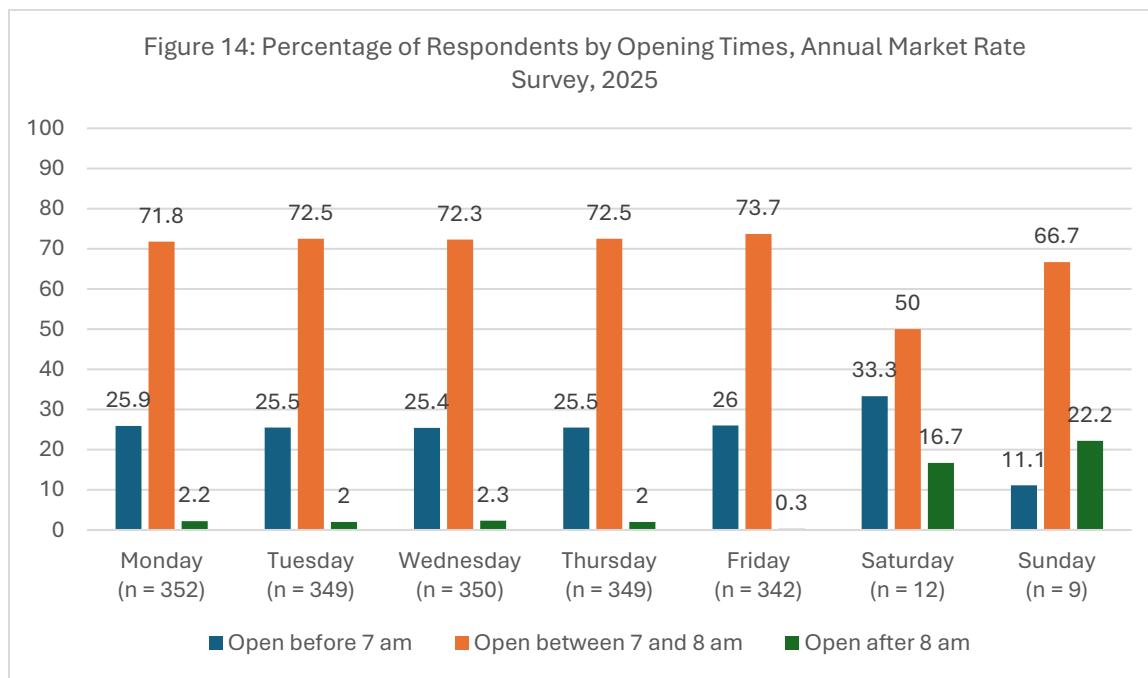
There was even less variation in facilities' closing hours during the work week, with most closing between 5pm and 6pm (Figure 15). There was more variation in closing times on weekends for those facilities open on weekends.

Figure 15: Percentage of Respondents by Closing Times, Annual Market Rate Survey, 2025
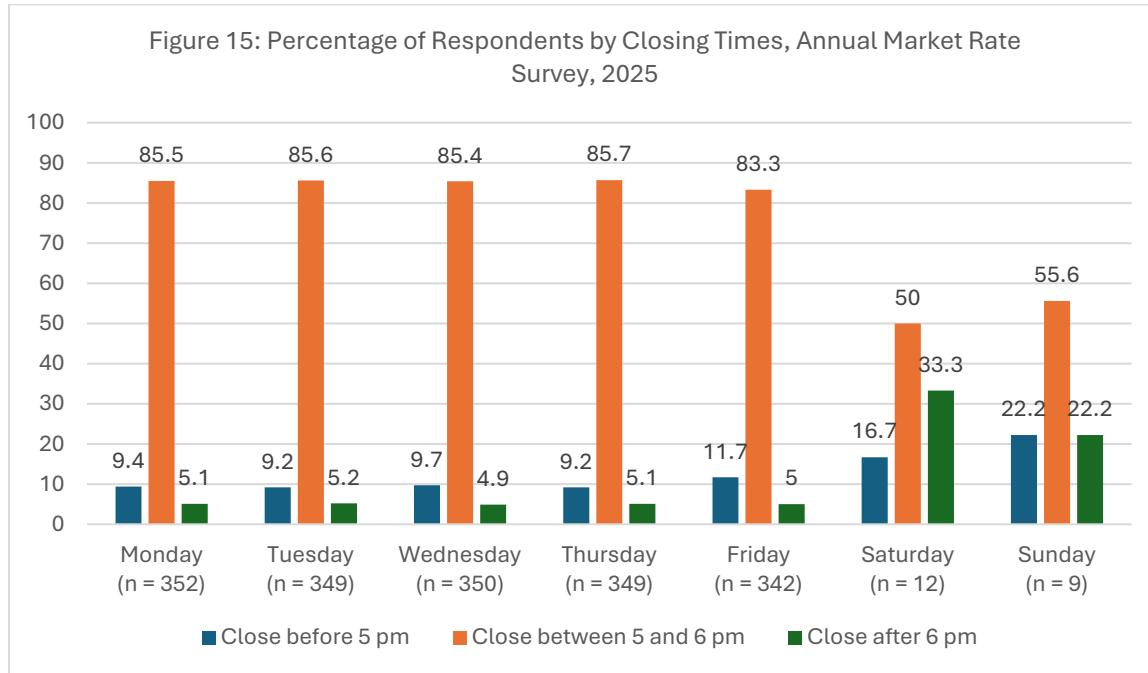
Nearly 3 in 4 (71.8 percent) providers had a wait list. Most of these were wait lists for full-time care. Among providers with a wait list, most had at least one child on a full-time wait list (78.8 percent), while nearly 1 in 5 (18.1 percent) had at least one child on a part-time wait list. About 16.5 percent of facilities had children on both full-time and part-time wait lists (Table 7).

Table 7: Wait List Status Among Facilities That Indicated Having a Wait List, Annual Market Rate Survey, 2025

Wait List Status	Percent of Providers
At least one child on full-time wait list	78.8%
At least one child on part-time wait list	18%
At least one child on both full- and part-time wait lists	16.5%
Count (n)	255

Across facility types and regional designations, demand for infant care placed the greatest strain on child care facilities, with infants being more likely to be on a wait list than children in other age groups The average number of infants on a full-time wait list for facilities that kept a wait list was 16.5 for center facilities and 3 for family/group facilities (Table 8). Wait lists averaged 11.5 at urban facilities, 4.5 at semiurban facilities, and 4.2 at rural facilities (Table 9). In contrast, school-age children consistently represented the smallest share of full-time wait lists across both facility types and geographic settings, indicating comparatively greater availability for this age group. The average number of school-age children on full-time wait lists was 2.1 at center facilities, 0.3 at family/group facilities, 1.5 at urban facilities, 0.7 at semiurban facilities, and 0.4 at rural facilities. Part-time wait lists were minimal across all settings, suggesting limited unmet demand for part-time care. Where part-time wait lists did exist, they varied by facility type and geography, with school-age children more commonly waiting at center-based (1.4) and urban facilities (1.3), and preschool-age children more prominent in semiurban (0.7) and rural areas (0.5).

Table 8: Number of Children on Full-Time and Part-Time Wait Lists for Child Care Facilities by License Type Among Facilities That Keep a Wait List, Annual Market Rate Survey, 2025

Age Group		Center Facilities		Family/Group Facilities	
		Full-time Wait List	Part-time Wait List	Full-time Wait List	Part-time Wait List
Infant	Mean	16.5	0.2	3	0.3
	Median	10	0	2	0
	75th Percentile	20.5	0	4	0
	Count (n)	64	36	136	79
Toddler	Mean	10.7	0.2	1.3	0.2
	Median	5	0	1	0
	75th Percentile	12	0	2	0
	Count (n)	67	37	142	81
Preschool	Mean	8.7	1.7	1	0.4
	Median	4	0	0	0
	75th Percentile	10	2	2	0
	Count (n)	67	47	139	81
School Age	Mean	2.1	1.4	0.3	0.1
	Median	0	0	0	0
	75th Percentile	2	0	0	0
	Count (n)	91	46	145	74

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Table 9: Number of Children on Full-Time and Part-Time Wait Lists for Child Care Facilities by Regional Designation Among Facilities That Keep a Wait List, Annual Market Rate Survey, 2025

Age Group		Urban Facilities		Semiurban Facilities		Rural Facilities	
		Full-time Wait List	Part-time Wait List	Full-time Wait List	Part-time Wait List	Full-time Wait List	Part-time Wait List
Infant	Mean	11.5	0.2	4.5	0.3	4.2	0.4
	Median	4	0	3	0	2	0
	75th Percentile	13.5	0	6	0	5	0
	Count (n)	84	45	67	31	51	39
Toddler	Mean	6.9	0.1	2.4	0.2	2.1	0.3
	Median	2	0	1	0	1	0
	75th Percentile	5	0	3	0	2	0
	Count (n)	91	47	68	31	52	40
Preschool	Mean	5.6	1.3	2	0.7	1.9	0.5
	Median	0	0	0	0	1	0
	75th Percentile	3.5	0	3	0	3	0
	Count (n)	88	50	68	34	52	44
School Age	Mean	1.5	1.3	0.7	0.1	0.4	0.2
	Median	0	0	0	0	0	0
	75th Percentile	0	0	0	0	0	0
	Count (n)	110	51	71	32	57	37

Child Care Rates

Provider data for service rates was provided according to provider fee schedules. Some providers charge monthly, while others charge weekly, daily, or hourly. The rates provided below are standardized monthly – that is, calculated to a monthly rate based on a given provider's rate schedule (see Methodology). While this is relatively simple for full-time rates, standardizing part-time rates requires assumptions that are not accounted for in the data. As such, part-time standardized rates should be interpreted with caution.

Full-Time Rates

In general, full-time rates for child care at center-based facilities were higher than full-time rates for child care at family/group facilities, and rates were higher for younger children (Table 10). The highest rates were for full-time infants at center-based facilities ($1,038 per month on average) and the lowest rates were for full-time school age children at family/group facilities ($668 per month on average).

Table 10: Monthly Normalized Full-Time Rates, by Age Group (in USD), Center and Family/Group Facilities, Annual Market Rate Survey, 2025

Age Group	License Type	Mean	Median	75th Percentile	Count (n)
Infants (0 to 17 months)	Center	$1,038	$1,045	$1,240	90
	Family/Group	$803	$800	$900	205
Toddlers (18 to 35 months)	Center	$980	$1,009	$1,122	92
	Family/Group	$790	$749	$880	218
Preschool (3 to 5 years)	Center	$893	$900	$1,040	100
	Family/Group	$763	$740	$823	217
School Age (6 to 12 years)	Center	$748	$800	$860	90
	Family/Group	$668	$700	$800	151

In general, full-time rates were higher in urban counties than they were in semiurban and rural counties (Table 11). However, there was a notable exception in full-time school age rates, where the mean monthly rate was higher in rural counties ($715) than in urban ($710) or semiurban counties ($663). The highest full-time rates by urban/rural designation were for infants at urban facilities, where the average monthly rate was $947. The lowest full-time rate by urban/rural designation was for school age children at semiurban facilities, where the average monthly rate was $663.

Table 11: Monthly Normalized Full-Time Rates, by Age Group (in USD) for Urban, Semiurban, and Rural Facilities, Annual Market Rate Survey, 2025

Age Group	Regional Designation	Mean	Median	75th Percentile	Count (n)
Infants (0 to 17 months)	Urban	$947	$900	$1,110	140
	Semiurban	$830	$800	$1,000	93
	Rural	$782	$760	$900	65
Toddlers (18 to 35 months)	Urban	$895	$860	$1,033	151
	Semiurban	$803	$800	$975	96
	Rural	$795	$720	$868	67
Preschool (3 to 5 years)	Urban	$848	$816	$978	152
	Semiurban	$784	$760	$880	97
	Rural	$747	$680	$823	70
School Age (6 to 12 years)	Urban	$710	$740	$855	110
	Semiurban	$663	$690	$800	72
	Rural	$715	$670	$800	60

Part-Time Rates

In general, part-time rates for child care at center-based facilities were higher than part-time rates for child care at family/group facilities, and rates were higher for infants and toddlers than for older children (Table 12). However, rates were about the same for infants as they were for toddlers for part-time care at center-based facilities. The highest part-time rates were for toddlers at center-based facilities, where the average monthly rate of part-time care was $801. The lowest part-time rates were for school age children at family/group facilities, where the average monthly rate for part-time care was $582.

Table 12: Monthly Normalized Part-Time Rates, by Age Group (in USD) for Center and Family/Group Facilities, Annual Market Rate Survey, 2025

Age Group	License Type	Mean	Median	75th Percentile	Count (n)
Infants (0 to 17 months)	Center	$799	$793	$1,060	24
	Family/Group	$708	$700	$900	97
Toddlers (18 to 35 months)	Center	$801	$802	$1,035	28
	Family/Group	$696	$680	$900	103
Preschool (3 to 5 years)	Center	$628	$628	$920	46
	Family/Group	$675	$650	$841	104
School Age (6 to 12 years)	Center	$701	$760	$900	45
	Family/Group	$582	$550	$800	87

Part-time rates were generally higher across age groups in urban counties than they were in rural counties (Table 13). The highest part-time rates by urban/rural designation were for infants at urban facilities, where the

average monthly rate for part-time care was $893. The lowest part-time rates by urban/rural designation were for school age children at semiurban facilities, where the average monthly rate for part-time care was $516.

Table 13: Monthly Normalized Part-Time Rates, by Age Group (in USD) for Urban, Semiurban, and Rural Facilities, Annual Market Rate Survey, 2025

Age Group	Regional Designation	Mean	Median	75th Percentile	Count (n)
Infants (0 to 17 months)	Urban	$893	$900	$1,040	50
	Semiurban	$624	$590	$800	34
	Rural	$647	$600	$900	39
Toddlers (18 to 35 months)	Urban	$840	$804	$1000	55
	Semiurban	$634	$560	$800	35
	Rural	$627	$600	$800	41
Preschool (3 to 5 years)	Urban	$774	$800	$900	66
	Semiurban	$575	$504	$800	39
	Rural	$568	$550	$700	45
School Age (6 to 12 years)	Urban	$755	$800	$900	61
	Semiurban	$516	$500	$700	35
	Rural	$540	$520	$700	37

Additional Fees

Additional fees are part of the payment structure for some facilities. These fees often include holding fees and registration fees. The rate structure for these fees varies as well. Holding fees are assessed as either one-time fees, weekly fees, monthly fees, or annual fees. Registration fees are assessed either one time or annually. Both holding and registration fees were generally similar across facility type and regional designation (Tables 14 and 15). The results of the survey did reveal exceptions, but the low response count associated with those exceptions makes it difficult to assess the validity of the findings. For example, survey respondents associated with center facilities who levy annual holding fees reported an average annual fee of $575 compared to only $99 for family/group facilities. However, only two center facilities reported an annual holding fee and only four family/group facilities reported an annual holding fee.

Table 14: Holding and Registration Fees (in USD) and Rate Structures by License Type, Annual Market Rate Survey, 2025

License Type	Rate Structure	Holding Fee		Registration Fee	
		Mean	Count (n)	Mean	Count (n)
Center	Weekly	$154	2	-	-
	Monthly	$295	10	-	-
	Annually	$575	2	$110	11
	One Time	$225	18	$96	27
Family/Group	Weekly	$95	25	-	-
	Monthly	$294	24	-	-
	Annually	$99	4	$119	14
	One Time	$232	17	$112	23

Table 15: Holding and Registration Fees (in USD) and Rate Structures by Regional Designation, Annual Market Rate Survey, 2025

Regional Designation	Rate Structure	Holding Fee		Registration Fee	
		Mean	Count (n)	Mean	Count (n)
Urban	Weekly	$102	14	-	-
	Monthly	$367	17	-	-
	Annually	$128	4	$126	14
	One Time	$191	20	$105	26
Semiurban	Weekly	$111	10	-	-
	Monthly	$346	7	-	-
	Annually	$1000	1	$88	6
	One Time	$266	8	$106	14
Rural	Weekly	$50	3	-	-
	Monthly	$135	10	-	-
	Annually	$35	1	$117	5
	One Time	$293	7	$97	10

Employment

Nearly half of all providers (49.6 percent) reported employing both full-time and part-time staff (Figure 16). A slightly smaller percentage (43.9 percent) reported employing only full-time staff, and 6.5 percent reported employing only part-time staff.

Figure 16: Percentage of Respondents by Full-Time or Part-Time Status of Employees, Annual Market Rate Survey, 2025

| | 49.6% | 43.9% | 6.5% |

n = 337   ■ Both Full and Part Time   ■ Full Time Only   ■ Part Time Only
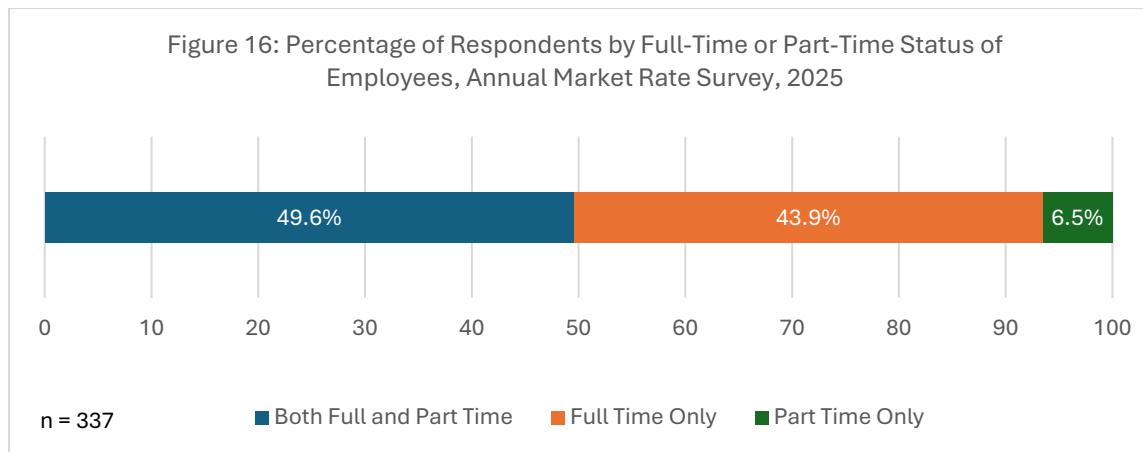
Child care facilities relied primarily on full-time staff, particularly in leadership and instructional roles while using part-time staff to support classroom operations and facility needs. Most facilities indicated that they employed at least one full-time owner/operator (67.5 percent). At least half of facilities employed at least one full-time teacher (54.8 percent). About a third of facilities employed administrative staff (30 percent) and less than a quarter of facilities employed classroom assistants (23.8 percent) (Table 16). The most frequently reported staff type for part-time staff was classroom assistants (28.5 percent) followed by teachers (22.9 percent).

Table 16: Percentage of Providers Employing Full-Time and Part-Time Staff Types, Annual Market Rate Survey, 2025 (n = 323)

Staff Type	Full-time Staff	Part-time Staff
Teachers	54.8%	22.9%
Classroom assistants	23.8%	28.5%
Administrative staff	30%	4.3%
Facilities staff	6.5%	6.8%
Owner/Operator	67.5%	2.8%
Other	7.7%	6.5%

Among providers who reported staff counts, the average number of staff members was nine per provider and the median was three. The 75th percentile was 10, meaning that 75 percent of providers who reported staff counts employed 10 or fewer total staff members. The average number of full-time staff members was 5.9 and the average number of part-time staff members was 3.1.

Most child care facilities operated with a very small number of staff. Nearly two-thirds of facilities (62.2 percent) employed five or fewer staff members, and these small facilities relied heavily on full-time employees, with approximately four out of five staff working full time (79.3 percent). As facility size increased, the share of full-time staff decreased and part-time employment became more common (Table 17).

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Table 17: Staff Size by Employment Status, Annual Market Rate Survey, 2025 (n = 323)

Number of Staff	Percentage of Facilities	Percentage of Staff Full-Time	Percentage of Staff Part-Time
1-5	62.2%	79.3%	20.7%
6-10	13%	65.4%	34.6%
11-15	6.2%	63.1%	36.9%
16-20	4.3%	68.4%	31.6%
21-30	6.8%	64.6%	35.4%
31-40	3.1%	66.4%	33.6%
41+	4.3%	60.9%	39.1%

Employee Counts and Wages

On average, center facilities both employed more staff and paid higher wages than family/group facilities. Teachers were the most frequently employed staff type, with an average of 7.7 full-time teachers and 3.2 part-time teachers employed by center facilities and an average of 0.8 full-time teachers and 0.2 part-time teachers employed at family/group facilities (Table 18). The average wage for a full-time teacher at a center facility was $17.68 per hour compared to $16.07 per hour at family/group facilities. Part-time teachers earned a lower hourly wage, $15.64 at center facilities and $12.50 at family/group facilities.

Classroom assistants were the second most frequently employed staff type, with an average of 2.5 full-time and 3.3 part-time classroom assistants employed at center facilities and an average of 0.3 full-time and 0.5 part-time classroom assistants employed at family/group facilities. Classroom assistants were the only type of employee that were more frequently employed as part-time employees than they were employed as full-time employees. Classroom assistants earned an average of $15.54 for full-time work and $13.97 for part-time work at center facilities, and an average of $15.19 for full-time work and $13.31 for part-time work at family/group facilities.

Other staffing types were less frequently employed. On average, center facilities and family/group facilities employed no more than one administrative employee, facilities employee, owner/operator, or other unlisted staff type. Full-time owner/operators earned an average hourly wage of $28.67 at center facilities and an average of $17.64 at family/group facilities. Part-time owner operators, of which there were relatively few, earned an average hourly wage of $20.33 at center facilities and an average of $15.50 at family/group facilities.

Table 18: Staff Employed with Average Wages by License Type and Employment Status, Annual Market Rate Survey, 2025

Type of Staff	License Type	Employment Status	Mean	Median	75th Percentile	Mean Hourly Wage
Teachers	Center	Full-Time	7.7	5	12	$17.68
		Part-Time	3.2	0	4	$15.64
	Family/Group	Full-Time	0.8	0	1	$16.07
		Part-Time	0.2	0	0	$12.50
Classroom Assistants	Center	Full-Time	2.5	0	3	$15.54
		Part-Time	3.3	0	4	$13.97
	Family/Group	Full-Time	0.3	0	0	$15.19
		Part-Time	0.5	0	0	$13.31
Administrative Staff	Center	Full-Time	1	1	1	$21.80
		Part-Time	0.1	0	0	$19.18
	Family/Group	Full-Time	0.1	0	0	$20.70
		Part-Time	< 0.1	0	0	(no data)
Facilities Staff	Center	Full-Time	0.2	0	0	$17.78
		Part-Time	0.2	0	0	$15.77
	Family/Group	Full-Time	< 0.1	0	0	$20.00
		Part-Time	< 0.1	0	0	$16.50
Owner/Operators	Center	Full-Time	0.7	1	1	$28.67
		Part-Time	< 0.1	0	0	$20.33
	Family/Group	Full-Time	0.8	1	1	$17.64
		Part-Time	< 0.1	0	0	$15.50
Other Staff	Center	Full-Time	0.2	0	0	$17.02
		Part-Time	0.1	0	0	$16.52
	Family/Group	Full-Time	0.1	0	0	$17.17
		Part-Time	0.1	0	0	$11.79

Trends were similar when examining staff counts and wages by regionality. Urban facilities generally employed the highest number of staff members and paid the highest wages, followed by semiurban facilities and rural facilities. Urban facilities employed an average of 4.1 full-time teachers and 2 part-time teachers, who earned an average hourly wage of $18.19 and $15.73, respectively (Table 19). Semiurban facilities employed an average of 3 full-time teachers and 0.8 part-time teachers, who earned an average hourly wage of $16.80 and $14.52, respectively. Rural facilities employed an average of 2.2 full-time teachers and 0.6 part-time teachers, who earned an average hourly wage of $15.90 and $12.87, respectively.

Table 19: Staff Employed with Average Wages by Regional Designation and Employment Status, Annual Market Rate Survey, 2025

Type of Staff	Regional Designation	Employment Status	Mean	Median	75th Percentile	Mean Hourly Wage
Teachers	Urban	Full-Time	4.1	0	5	$18.19
		Part-Time	2	0	1	$15.73
	Semiurban	Full-Time	3	1	3	$16.80
		Part-Time	0.8	0	0	$14.52
	Rural	Full-Time	2.2	1	3	$15.90
		Part-Time	0.6	0	0	$12.87
Classroom Assistants	Urban	Full-Time	1.5	0	0	$16.37
		Part-Time	2	0	1	$14.29
	Semiurban	Full-Time	0.8	0	1	$14.87
		Part-Time	1	0	1	$13.79
	Rural	Full-Time	0.5	0	0	$14.35
		Part-Time	1.3	0	1	$12.15
Administrative Staff	Urban	Full-Time	0.6	0	1	$22.19
		Part-Time	0.1	0	0	$19.35
	Semiurban	Full-Time	0.4	0	1	$20.16
		Part-Time	0.1	0	0	$18.00
	Rural	Full-Time	0.3	0	0	$21.54
		Part-Time	0.1	0	0	$19.00
Facilities Staff	Urban	Full-Time	0.1	0	0	$18.94
		Part-Time	0.1	0	0	$17.08
	Semiurban	Full-Time	< 0.1	0	0	$14.81
		Part-Time	0.1	0	0	$13.40
	Rural	Full-Time	< 0.1	0	0	$18.00
		Part-Time	0.3	0	0	$16.50
Owner/Operators	Urban	Full-Time	0.7	1	1	$22.20
		Part-Time	< 0.1	0	0	$15.50
	Semiurban	Full-Time	0.8	1	1	$22.17
		Part-Time	< 0.1	0	0	$30.00
	Rural	Full-Time	0.8	1	1	$23.10
		Part-Time	< 0.1	0	0	(no data)
Other Staff	Urban	Full-Time	0.1	0	0	$19.92
		Part-Time	0.1	0	0	$15.53
	Semiurban	Full-Time	0.2	0	0	$14.83
		Part-Time	0.2	0	0	$12.39

Rural	Full-Time	0.1	0	0	$14.38
	Part-Time	0.1	0	0	$15.00

Full-time and part-time classroom assistants were the only other staff type for which facilities in any regional designation employed more than one of on average, with urban facilities employing an average of 1.5 full-time and 2 part-time classroom assistants. Semiurban facilities employed an average of 0.8 full-time and 1 part-time classroom assistants, and rural facilities employed an average of 0.5 full-time and 1.3 part-time classroom assistants. Full-time and part-time classroom assistants employed by urban facilities earned an average hourly wage of $16.37 and $14.29 respectively, higher than the averages of $14.87 and $13.79 earned by full-time and part-time assistants at semiurban facilities and the average of $14.35 and $12.15 earned by full-time and part-time assistants at rural facilities.

Fringe Benefits

Just over 4 in 10 (43.3 percent) respondent facilities offered fringe benefits to full-time staff members. Fringe benefits were less frequently offered to part-time staff members, who were offered fringe benefits at less than 1 in 5 (18 percent) respondent facilities. For both full-time and part-time staff, the most frequently offered fringe benefit was paid time off, which was offered to full-time staff at 84.7 percent of facilities where full-time staff were offered fringe benefits, and to part-time staff at 60.6 percent of facilities where part-time staff were offered fringe benefits (Figure 17). Although health insurance was the second most frequently offered fringe benefit for full-time staff (49.1 percent), it was the least frequently offered fringe benefit for part-time staff (15.2 percent).

Figure 17: Percentage of Facilities Offering Particular Fringe Benefits among Facilities That Offer Fringe Benefits, Annual Market Rate Survey, 2025
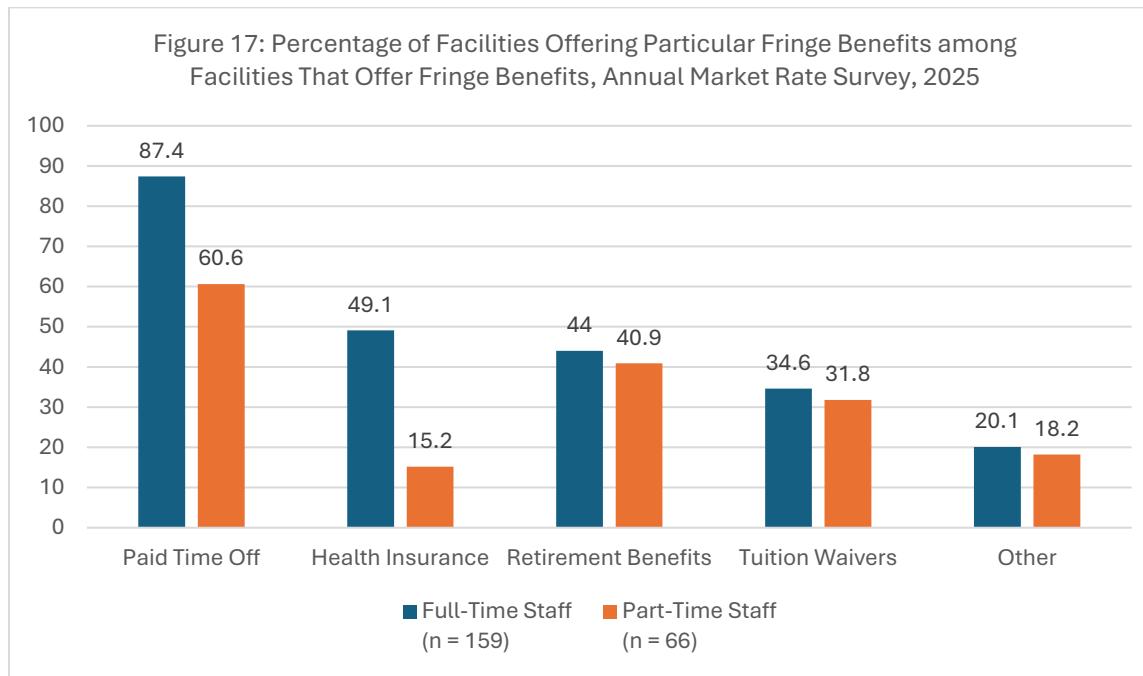
Home-Based Facility Infrastructure

Nearly half (45.4 percent) of responding providers operated their facility out of their home. The average size of a home used as a child care facility was 2,491 square feet, of which an average of 723 square feet were used

exclusively for child care, and an average of 1,054 square feet were used for child care as well as part of the living space (Table 20).

Table 20: Home-Based Provider Facility Square Footage, Annual Market Rate Survey, 2025

	Total home square footage (n=122)*	Exclusive child care space (sq ft) (n=156)	Non-exclusive child care space (sq ft) (n=156)
Mean	2,491	723	1,054
Median	2,400	600	972
75th Percentile	3,000	1,175	1,814

*Thirty-four providers reported the square footage used exclusively and non-exclusively for child care but not the total square footage of the home.

Child care providers who operated home-based facilities reported an average of 13.3 hours per week spent on facility management outside of business hours during weeks when the facility was open for business (Table 21). During weeks when they were closed (2.3 weeks per year on average), they reported an average of 5.6 hours of management time.

Table 21: Management Hours for Home-Based Facilities, Annual Market Rate Survey, 2025

	Management hours per week	Weeks closed per year	Management hours per week while closed
Mean	13.3	2.3	5.6
Median	10	2	1
75th Percentile	15	3	8
Count (n)	155	156	156

Revenue and Expenditures

Average revenues, operations expenditures, operations and capital expenditures and net revenues were calculated using four different scenarios. The various scenarios were developed to control for data limitations. Data limitations included non-response and missing values for revenues and wages and salaries and reported data that was deemed unreliable due to inconsistencies with other survey data and estimates based on reported enrollment and employment.

Estimates for Scenario #1 were based on expenditure data as reported and revenue data as reported. Revenue data that was deemed to be unreliable based on enrollment and reported expenditures were coded as missing and excluded for Scenario #1.

Estimates for Scenario #2 were based on the same expenditures and revenue data as Scenario #1, but with the addition of backfilled estimated revenues and estimated wages and salary expenses when those values were missing (not reported). Missing values for revenues were calculated based on reported enrollment and reported weekly normalized rates for each age group. Missing values for wages and salaries were calculated for those respondents that indicated they had paid employees, but did not report any wage or salary data. Wages and salaries were based on reported number of employees and average wages by type of position.

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Estimates for Scenario #3 were based on observations in Scenario #2 but replaced reported revenues and wage and salary expenses that did not align with expected values. For example, a respondent may have reported a value in wages and salaries, but based on reported number of employees and wages rates, the expected amount for wages and salaries would be substantially higher or lower than reported values. Estimated wages and salary values were based on reported number of employees and average wages by type of position. A similar test was used to estimate revenues when the reported revenue values did not align with reported expenditures or estimated revenues. Estimated values for revenues were based on reported enrollment and normalized weekly rates.

Estimates for Scenario #4 were based entirely on estimated revenues and estimated wages plus other reported expenditures. Estimates for revenues were based on the reported number of children enrolled and normalized reported weekly rates. However, given data limitation on assumptions related to part-time enrollment and rates, Scenario #4 likely overestimates revenues. Limitations on estimates of revenues from part-time enrollment is a result of substantial variability associated with the rate schedules and average hours of care associated with part-time enrollment. Estimates of wages and salaries associated with part-time employees have similar limitations based on the substantial variability in the number of hours worked by part-time employees.

Given the shortcomings associated with Scenario #4, the discussion of the results with be limited to the findings associated with Scenarios #1, #2, and #3.

Net revenues were calculated two ways, taking into consideration (1) operations expenditures only and (2) operations and capital expenditures. Typically, capital expenditures for major projects or purchases such as building renovations, vehicle purchases, or playground equipment would be amortized over a number of years and only payments and interest on those capital expenditures would be considered as operating expenses. However, collecting data to account for amortization of capital expenditures would have further complicated the questionnaire making it burdensome for survey respondents. Given that not all facilities will have capital expenditures every year, it is assumed that the capital expenditures reported by survey respondents presents a snap shot of average capital expenditures across all facilities. Accordingly, net revenues are calculated both as a percentage of operations expenditures and operations and capital expenditures. Gross revenues, expenditures, and net revenues varied substantially depending on the scenario.

Average net revenues using only operations expenditures for center facilities were estimated to be $43,134 (Scenario #1), $56,673 (Scenario #2) and $74,416 (Scenario #3), which equate to a profit margin of 6.9, 8.9 and 10.5 percent respectively (Table 22). When capital expenditures are factored into the calculation of net revenues, net revenues for center facilities were $27,923 (Scenario #1), $40,558 (Scenario #2) and $58,068 (Scenario #3), which equates to a profit margin of 4.5, 6.4 and 8.2 percent respectively (Table 22).

Average net revenues using only operations expenditures for family/group facilities were estimated to be $15,659 (Scenario #1), $11,979 (Scenario #2) and $4,939 (Scenario #3), which equates to profit margins of 20, 11.6, and 4.5 percent respectively. When capital expenditures are factored into the calculation of net revenues, net revenues for family/group facilities were $10,103 in Scenario #1 and $7,015 in Scenario #2. In Scenario #3,

family/group facilities operated at an average loss of $1,434 when factoring in capital expenditures. This equates to a profit margin of 12.3, 6.8 and -1.3 percent respectively (Table 22).

Family/group provider results were more sensitive to the various assumptions associated with the four scenarios. This is likely due to greater data limitations, shortcomings and inconsistencies associated with survey data from family/group license types. Backfilling missing wages and salaries and revenues from family/group providers' survey data had substantial impacts on estimates of net revenue for family/group providers. Given the various shortcomings and effects of results from the different assumptions, Scenario #2 for center providers and Scenario #3 for family/group providers likely provides the best estimate of average revenues and expenditures.

Table 22: Child Care Providers Estimated Revenues and Expenditures (in USD) by License Type, 2024, Annual Market Rate Survey, 2025

Scenario Number	License Type	Revenues	Operations Expenditures	Operations and Capital Expenditures	Net Revenue Operations Expenditures Only	Net Revenue Operations and Capital Expenditures	Count (n)
Scenario #1	Center	$626,603	$583,468	$598,680	$43,134	$27,923	65
	Family/Group	$78,177	$62,518	$68,074	$15,659	$10,103	88
Scenario #2	Center	$634,811	$578,138	$594,253	$56,673	$40,588	85
	Family/Group	$103,457	$91,478	$96,443	$11,979	$7,015	117
Scenario #3	Center	$707,219	$632,803	$649,151	$74,416	$58,068	85
	Family/Group	$110,967	$106,028	$112,401	$4,939	($1,434)	117
Scenario #4	Center	$865,833	$734,978	$752,183	$130,855	$113,650	87
	Family/Group	$133,768	$117,725	$123,088	$16,043	$10,680	160

Average revenues and expenses were calculated on a per child basis. The per child revenue and expenses were based on a head count of total children enrolled per facility with no consideration for distribution of full-time versus part-time enrollment. Average expenses per child were calculated based on operations expenditures only. Like average net revenues and expenses, average revenues and expenses on a per child basis also varied depending on the scenario and results for family/group facilities were more sensitive to the assumptions associated with the various scenarios.

Average net revenue per child for center facilities were $568 (Scenario #1), $847 (Scenario #2) and $876 (Scenario #3), which equates to per child net revenues of 6.2, 9.2 and 9.1 percent respectively. Average net revenue per child for family/group facilities were $1,476 (Scenario #1), $487 (Scenario #2) and -$132 (Scenario #3), which equates to per child net revenues of 22.3, 6.4 and -1.7 percent respectively (Table 23).

Table 23: Average Revenues and Operations Expenditures Per Child (in USD) by License Type, 2024, Annual Market Rate Survey, 2025

Scenario Number	License Type	Average Revenue Per Child	Average Operations Expenses Per Child	Net Difference Per Child	Count (n)
Scenario #1	Center	$9,097	$8,529	$568	61
	Family/Group	$6,627	$5,152	$1,476	86
Scenario #2	Center	$9,205	$8,358	$847	69
	Family/Group	$7,621	$7,134	$487	99
Scenario #3	Center	$9,657	$8,782	$876	81
	Family/Group	$7,930	$8,063	($132)	113
Scenario #4	Center	$11,331	$9,972	$1,358	87
	Family/Group	$9,393	$8,646	$748	158

Capital outlays were higher on average for center facilities than they were for family/group facilities, $19,899 and $10,564 respectively (Table 24). Both center and family/group facilities most frequently reported capital outlays of between $1,000-$5,000, 38.9 percent and 31.4 percent, respectively. Center facilities more frequently had capital outlays of more than $10,000, 39.8 percent, compared to 27.9 percent. Family/Group facilities more frequently had less than $1,000 in capital outlays than Center Facilities, 20.7 percent compared to only 6.0 percent, respectively (Table 24).

Table 24: Capital Outlays (in USD) by License Type, 2024, Annual Market Rate Survey, 2025

Total Capital Outlays	Center (n = 83)	Family/Group (n = 140)
Less than $1,000	6.0%	20.7%
$1,001 to $5,0000	39.8%	31.4%
$5,001 to $10,000	14.5%	20.0%
$10,001 to $20,000	19.3%	13.6%
More than $20,000	20.5%	14.3%
Total	*100%*	*100%*
Average Capital Outlays	**$19,899**	**$10,564**

The distribution of operations expenditures were estimated using Scenario #3. Differences in the distribution of operations expenditures between scenarios were not significant, and Scenario #3 most robustly backfilled for missing and unreliable values. On average, operations expenditures were substantially higher for center facilities than they were for family/group facilities. The average total operations expenditures for center facilities were $632,803 and the average total operations expenditures for family/group facilities were $106,028. At both center and family/group facilities, wages and salaries accounted for most of the operations expenditures (71.4 percent at center facilities and 63.5 percent at family/group facilities). Other substantial operations expenditures included food, lease/mortgage, and employee benefits.

Figure 18: Percentage of Operations Expenditures by License Type, 2024, Annual Market Rate Survey, 2025
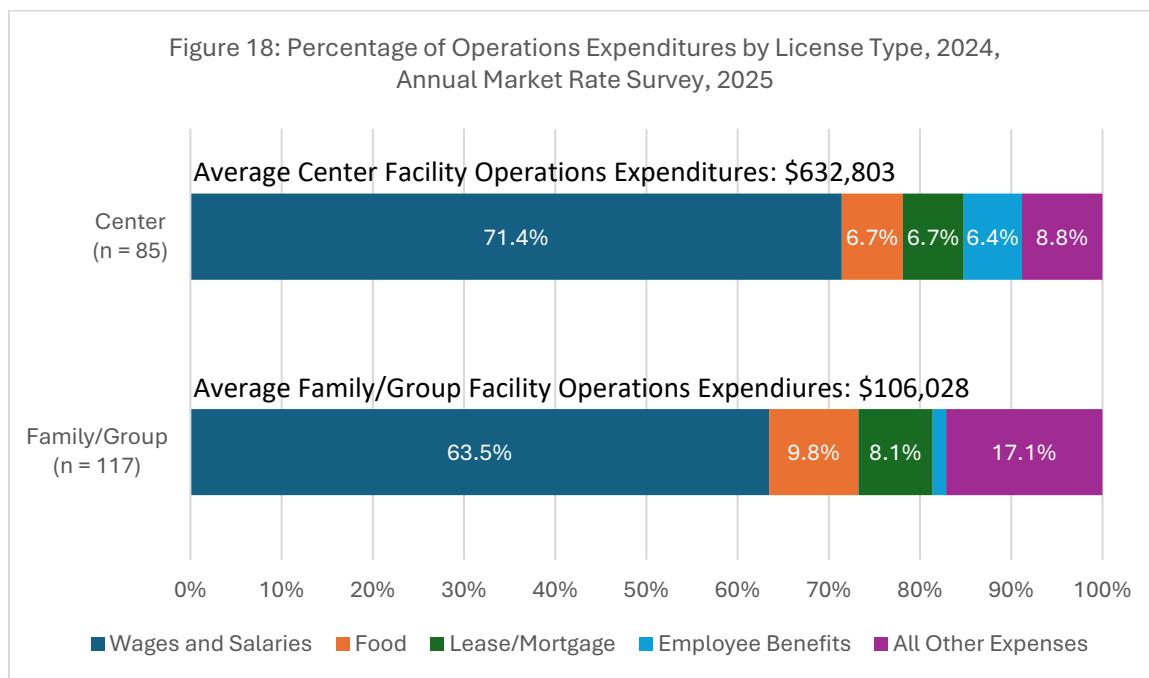
Key Findings

Child care facilities are operating at or near capacity state wide. On average, and consistently across license types and regional designations, child care facilities operated at roughly 75.0 percent capacity, with at least a quarter of child care facilities operating at full capacity. Capacity was particularly limited at facilities in rural counties, where the average utilization was 81.5 percent and the median was 88.9 percent. In other words, on average rural child care facilities operated at 81.5 percent capacity, and half of all child care facilities in rural counties operated at 88.9 percent capacity. Wait lists were also long, particularly for younger children at center facilities. Among center facilities that have wait lists, the average number of infants awaiting full-time care was 16.5, the average number of toddlers awaiting full-time care was 10.7, and the average number of preschool children awaiting full-time care was 8.7.

Child care was generally less expensive at family/group facilities than at center facilities, and was generally more expensive for younger children than for older children. The average normalized monthly rate for full-time care for an infant at a center facility was $1,038, and at a family/group facility the average normalized monthly rate was $803. While rates for school age children were the lowest among all age groups, the average normalized rate was $748 per month at center facilities and $668 per month at family/group facilities for full-time care. In general child care normalized monthly rates were higher in urban counties than they were in semiurban or rural counties, $947, $830, and $782 for full-time infants at urban, semiurban, and rural facilities, respectively. The notable exception was normalized monthly rates for school age children. School age rates at rural facilities were $715, compared to $710 at urban facilities and $663 at semiurban facilities.

Most facilities (62.2 percent) employed between 1 and 5 people, and on average facilities with fewer employees employed a higher percentage of full-time staff. For facilities with between 1 and 5 employees, 79.3 percent of staff members were employed full-time and 20.7 percent were employed part-time. At facilities with more than 40 staff members, an average of 60.9 percent of staff were employed full-time and 39.1 percent of staff were employed part-time. Teachers were the most frequently employed full-time staff type, with an average of 7.7 full-time teachers employed by center facilities and an average of 0.8 full-time teachers employed by family/group facilities. Classroom assistants were the most frequently employed part-time staff type, with an average of 3.3 part-time assistants employed by center facilities and an average of 0.5 part-time assistants employed by family/group facilities.

On average, wages were higher at center facilities than at family/group facilities. Full-time teachers at center facilities earned a mean hourly wage of $17.68, compared to $16.07 for full-time teacher at family/group facilities. The employment type with the highest average hourly wage, not including a facility's owner/operator, was administrative staff. Full-time administrative staff earned an average hourly wage of $21.80 at center facilities and $20.70 at family/group facilities. The employment type with the lowest average hourly wage was classroom assistants, full time average wages were $15.54 at center facilities and $15.19 at family/group facilities.

Most facilities did not offer fringe benefits to employees, although facilities were more likely to offer fringe benefits to full-time employees (43.3 percent) than part-time employees (18.0 percent). At facilities that did offer fringe benefits to full-time and part-time employees respectively, paid time off was the most frequently offered benefit, offered to 87.4 percent of full-time employees, and offered to 60.6 percent of part-time employees. The largest discrepancy between benefits offered to full-time and part-time employees was health insurance, which was offered to 49.1 percent of full-time employees at facilities that offered fringe benefits to full-time employees but only 15.2 percent of part-time employees at facilities that offered fringe benefits to part-time employees.

Revenue and expenditure analyses were highly variable and potentially unreliable due to data limitations. The revenues and expenditures reported by participant facilities were often inconsistent with expected values based on the reported number of children, reported rates, reported number of employees, and reported hourly wages. Multiple scenarios, each using different assumption were used to backfill for missing or unreliable data. Given the data limitation associated with Scenario #1 and likely overestimation of revenues and expense associated with Scenario #4, finding from Scenarios #2 and #3 are likely the best approximations suggesting average revenues based only on operations expenditures ranged from 9.0 to 10.5 percent for center facilities and 4.5 percent to 11.6 percent for family/group facilities. Net profits based on operations and capital expenditures were lower, ranged from 6.4 to 8.2 percent for center facilities and -1.3 to 6.8 percent for family/group facilities. Results for family/group providers were more sensitive to the various assumptions associated with the various scenarios. Data limitation and limitations associated with assumptions associated with each scenario should be taken into consideration when interpreting the results.

Considerations for Future Research

In accordance with recommendations from the previous North Dakota Child Care Provider Report and in an effort to reach a broader population of child care providers, a paper mail survey was conducted in conjunction with an online version of the 2025 Annual Update and Market Rate Survey for North Dakota Child Care Providers. The paper mail version of the survey was successful in reaching providers who either did not see or preferred not to respond to the online version of the survey.

Lessons learned from the way that providers interpreted and answered survey questions provided considerable insight into how future questionnaires can be modified to improve data collections. Improvements were made to the previous survey to improve data collection in 2025. However, further improvements are necessary, particularly for survey questions involving revenues and expenditures.

The 2025 survey instrument was revised substantially from the previous instrument in order to make it shorter and less cumbersome to complete, but further refinements to the questionnaire should be considered. One potential approach would be to amend the main questionnaire to address issues such as services provided, child care rates, employment, revenues, and expenditures and supplement the main questionnaire with a regularly administered short questionnaire to track variables that change frequently throughout the year, such as current enrollment and current wait list. This approach would provide more timely data on variables that frequently change while simultaneously condensing the main survey instrument.

Appendix A: License Types

The following section includes definitions for each license type included in this report as outlined on the North Dakota Department of Health and Human Services website[3].

Center (C)

Child care centers are licensed and monitored by the HHS Early Childhood Licensing Unit and must meet regulations per North Dakota Century Code 50-11.1 and North Dakota Administrative Rule 75-03-10 including standards for background checks and basic health and safety training. These programs receive one announced and one unannounced monitoring visit per year.

Setting	Age Range	Capacity	Child and Adult Care Food Program Eligible?	Child Care Assistance Program Eligible?
Programs are often in free-standing buildings, businesses, community centers, or places of worship. They may be privately-owned, for-profit business or a non-profit entity that is governed by a board of directors.	Infants through 11 years old	19 or more children	Yes	Yes

Family (F)

Family child care programs are licensed and monitored by the HHS Early Childhood Licensing Unit and must meet regulations per North Dakota Century Code 50-11.1 and North Dakota Administrative Code 75-03-08 including standards for background checks and basic health and safety training. These programs receive one announced and one unannounced monitoring visit per year.

Setting	Age Range	Capacity	Child and Adult Care Food Program Eligible?	Child Care Assistance Program Eligible?
Private residence	Infants through 11 years old	Up to 7 children, of which no more than 3 may be under the age of 24 months, plus 2 additional school-age children, or; maximum of 4 children under the age of 24 months, plus 2 school-age children. A provider's own children under age 12 must be included in the total.	Yes	Yes

Group (G and H)

Group child care programs are licensed and monitored by the HHS Early Childhood Licensing Unit and must meet regulations per North Dakota Century Code 50-11.1 and North Dakota Administrative Code 75-03-09 including standards for background checks and basic health and safety training. These programs receive one announced and one unannounced monitoring visit per year.

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[3] North Dakota Department of Health & Human Services, 2022. "Types of Care". https://www.hhs.nd.gov/cfs/early-childhood-services/families/finding-child-care. Accessed: June 7, 2024.

Setting	Age Range	Capacity	Child and Adult Care Food Program Eligible?	Child Care Assistance Program Eligible?
Private residence (group-home license G) or non-residential building (group-facility license H)	Infants through 11 years old	Up to 30 children, dependent upon square-footage requirements, staffing ratios and local ordinances. A provider's own children under age 12 must be included in the total.	Yes	Yes

Preschool (E)

Private preschool programs are licensed and monitored by the HHS Early Childhood Licensing Unit and must meet regulations per North Dakota Century Code 50-11.1 and North Dakota Administrative Code 75-03-11 including standards for background checks and basic health and safety training. These programs receive one announced and one unannounced monitoring visit per year. Private preschool programs provide care part-time, with hours limited to three hours a day.

Setting	Age Range	Capacity	Child and Adult Care Food Program Eligible?	Child Care Assistance Program Eligible?
Programs are often in free-standing buildings, businesses, community centers, or places of worship. They may be privately-owned, for-profit business or a non-profit entity that is governed by a board of directors.	2 through 5 years old	Varies, dependent on square footage requirements	Yes	No

School-age (K)

School-age child care programs are licensed and monitored by the HHS Early Childhood Licensing Unit and must meet regulations per North Dakota Century Code 50-11.1 and North Dakota Administrative Code 75-03-11.1 including standards for background checks and basic health and safety training. These programs receive one announced and one unannounced monitoring visit per year. School age programs provide care for children in kindergarten through sixth grade. These programs offer services before and after school, sometimes on school holidays, and through the summer months.

Setting	Age Range	Capacity	Child and Adult Care Food Program Eligible?	Child Care Assistance Program Eligible?
Programs are often in free-standing buildings, businesses, community centers, or places of worship. They may be privately-owned, for-profit business or a non-profit entity that is governed by a board of directors.	5 through 11 years old	Varies, dependent upon square-footage requirements	Yes	Yes

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Multiple-Licensed (M)

Multiple-licensed facilities are licensed to provide more than one type of early childhood services, such as a center/preschool or group/preschool. Multiple-licensed child care programs are licensed and monitored by the HHS Early Childhood Licensing Unit and must meet regulations per North Dakota Century Code 50-11.1 and all Administrative Rules applicable to group child care, preschool, or to child care centers, including standards for background checks and basic health and safety training. Multiple-licensed programs receive one announced and one unannounced monitoring visit per year.

Setting	Age Range	Capacity	Child and Adult Care Food Program Eligible?	Child Care Assistance Program Eligible?
Programs are often in free-standing buildings, businesses, community centers, or places of worship. They may be privately-owned, for-profit business or a non-profit entity that is governed by a board of directors.	Infants through 11 years old	Varies by early childhood service type	Yes	Yes

Appendix B: Survey Instrument

ANNUAL UPDATE AND MARKET RATE SURVEY
FOR NORTH DAKOTA CHILD CARE PROVIDERS

This survey will take about 20 to 30 minutes to complete. It will ask you questions about your child care facility, as well as some questions about your expenses. This information is used to help the state set appropriate reimbursement rates for the Child Care Assistance Program (CCAP), and will **never** be associated with you as a provider. Your name will not be on any reports, and your answers will be grouped with those of others who respond.

Your participation is voluntary. If you do not want to participate at all, or if you do not want to answer a particular question, that's okay. However, by completing this survey, you play a vital role in shaping policies that directly impact child care providers and the families they serve. Your input helps ensure fair and accurate reimbursement rates, strengthening support for quality child care in your community. Last year's Market Rate Survey provided information that allowed the state to increase preschool rates from $811 to $1,040 for centers and $680 to $823 for group/family providers. If you choose to do the survey, your answers will be kept confidential and will be used only to answer questions related to the purpose of this study.

Your submission of this completed survey constitutes your consent to participate in this Annual Update and Market Rate survey.

Please note that if you have multiple locations, you will need to do multiple surveys. If you get stuck or need clarification, please refer to the following resources:

Center for Social Research		
Nancy Hodur	Nancy.hodur@ndsu.edu	(701) 231-8621
Avi Slone	avram.slone@ndsu.edu	
Child Care Aware		
General line	referral@ndchildcare.org	(701) 997-8515 (option 1)
North Dakota Department of Health and Human Services		
General line	CCAP@nd.gov	(701) 328-2332 (option 1)

1.   LICENSE DETAILS

What is your license number? Do not include spaces or dashes.

_____

2.   CAPACITY, ENROLLMENT, VACANCY, AND ENVIRONMENT

What is your facility's total licensed capacity?

_____

What is your facility's total desired capacity?

_____

What is the age range of children <u>you accept</u> in your program? *Respond using years and months; e.g. "1 year 6 months" or "3 years 0 months". Please enter the youngest and oldest ages you will accept in your child care program, even if no one in that age category is currently enrolled.*

Youngest age: _____years   _____ months

Oldest age: _____years   _____ months

Which of the following age groups does your facility serve? *Check all that apply.*

Infants (birth to 17 months)
Toddlers (18 to 35 months)
Preschool (3 to 5 years)
School-age (6 to 12 years)

Which weekly schedules do you offer? *Check all that apply.*

Full-time
Part-time

How many children in each age group that you serve are <u>currently</u> <u>enrolled</u> at your facility? *Use numbers only. If you do not serve a specific age group, leave that line blank. If you do not offer a specific type of enrollment, leave that column blank.*

	Full-Time Enrollment	Part-Time Enrollment
Infant (0 to 17 months)		
Toddler (18 to 35 months)		
Preschool (3 to 5 years)		
School-age (6 to 12 years)		

How many <u>vacancies</u> **do you have in each age group that you currently serve?** *Use numbers only. If you do not serve a specific age group, leave that line blank. If you do not offer a specific type of enrollment, leave that column blank.*

	Full-Time Vacancies	Part-Time Vacancies
Infant (0 to 17 months)		
Toddler (18 to 35 months)		
Preschool (3 to 5 years)		
School-age (6 to 12 years)		

How many children in each age group that you serve are currently on a <u>wait list</u> **at your facility?** *Use numbers only. If you do not maintain a waitlist for children to get into your program, please skip this question. If you do not serve a specific age group, leave that line blank. If you do not offer a specific type of enrollment, leave that column blank.*

	Full-Time Wait List	Part-Time Wait List
Infant (0 to 17 months)		
Toddler (18 to 35 months)		
Preschool (3 to 5 years)		
School-age (6 to 12 years)		

3.   PROGRAM HOURS AND SCHEDULES

Do you offer any of the following schedule options? *Check all that apply.*

Drop-in care   ☐ ....Weekend care
Before school care   ☐ ....Overnight care
After school care   ☐ ....Other (please describe):
Temporary or emergency care   _____
Evening care   _____

How does your facility operate throughout the year?

Year round
School year only
Summer only
Other (please describe): _____

Please use the form below to enter your operating times. Enter the times at which you open and close for the day, and indicate AM or PM for each time. *If you are <u>not open</u> on a given day, please enter "Not Open" on this day". If your facility has more than one opening and closing time, please input the <u>earliest open and latest closing</u> times.*

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Opening							
Closing							

4.   CHILD CARE RATES

Please note: This question is about the rates that your facility charges for *full-time* child care

My facility does not offer full-time care **(GO TO Q0)**

For each age group that you serve, please enter the <u>full-time rate</u> that you charge, and the rate structure type – hourly, daily, weekly, twice monthly (or biweekly), monthly, or annually.

	Full-Time Rate	**Rate Structure Type**
Infant (0 to 17 months)		
Toddler (18 to 35 months)		
Preschool (3 to 5 years)		
School-age (6 to 12 years)		

Please note: This question is about the rates that your facility charges for *part-time* child care.

My facility does not offer part-time care **(GO TO Section 5)**

For each age group that you serve, please enter the <u>part-time rate</u> that you charge, and the rate structure type – hourly, daily, weekly, twice monthly (or biweekly), monthly, or annually.

	Part-Time Rate	**Rate Structure Type**
Infant (0 to 17 months)		
Toddler (18 to 35 months)		
Preschool (3 to 5 years)		
School-age (6 to 12 years)		

5.   ADDITIONAL SERVICES AND FEES

Please Note: This section is about the rates that your facility charges for <u>extra services and fees</u>. In this section, we will ask about the <u>rate structures</u> that your facility uses to structure how families pay for these extra services and fees. The rate structures that you use for different services and fees may vary widely. *For example, you might use a one-time rate structure for registration fees, a per-minute rate structure for late pick-up, and a per-serving rate structure for meals and snacks.*

Does your facility charge a registration fee that is <u>not included</u> as part of your basic tuition fees?

Yes

No

Please describe the rate and structure at which you most frequently charge a registration fee. *For example, if you charge a one-time registration fee of 100 dollars enter "100 one-time."*

	Service Rate	Rate Structure Type
Registration fee		

For each of the following other fees related to administrative issues, please provide the rate and structure if it is <u>not included in basic tuition</u>. If you do not charge extra for an administrative issue, please put a ZERO in the RATE column. *For example, if you charge $150 for a deposit, enter "150 one-time." If you charge $10 for late payments, enter "$10 per week."*

	Service Rate	Rate Structure Type
Fee for holding a spot (e.g. one-time, per year, etc.)		
Deposit for a spot (e.g. one-time, per session, etc.)		
Late payment fee (e.g. flat-rate, percentage, etc.)		
Other (please describe)		
Other (please describe)		
Other (please describe)		

For each of the following services <u>not included in basic tuition</u>, please provide the rate and structure. If you do not charge extra for a service, please put a ZERO in the RATE column. *For example, if you charge $5 per minute for late pick-up, enter "$5 per minute." If you charge 75 cents per mile for transportation, enter "$0.75 per mile."*

	Service Rate	Rate Structure Type
Transportation (e.g. per-mile, per-trip, etc.)		
Field trips (e.g. per-trip, per-month, etc.)		
Special activities (e.g. per-activity, per-month, etc.)		
Materials and supplies (e.g. per-week, cost-dependent, etc.)		
Meals and snacks (e.g. per-week, per-serving, etc.)		
Early drop-off (e.g. per-minute, per-hour, etc.)		
Late pick-up (e.g. per-minute, per-hour, etc.)		
Other (please describe)		
Other (please describe)		
Other (please describe)		

Does your facility participate in any of the following program practices? *Check all that apply.*

We require parents to pay before providing care
We charge when a child is absent due to the child's vacation
We charge when a child is absent due to other reasons in the child's family
We charge when we are open on a holiday and the child is absent
We charge when our program is closed due to staff illness
We charge when our program is closed because staff is on vacation
We do not participate in any of these

6.   CHILD CARE ASSISTANCE PROGRAM

<u>In 2024,</u> did any children enrolled at your facility receive benefits from North Dakota's Child Care Assistance Program (CCAP)?

Yes
No **(GO TO Question 0)**

How many children <u>who were enrolled in your facility in 2024</u> received benefits from North Dakota's Child Care Assistance Program (CCAP)? *Use numbers only*

_____

In 2024, did the rate paid to your facility by CCAP cover the full rate of providing care to the children covered by CCAP?

Yes, for all served age groups **[GO TO Q0]**
Yes, for some served age groups, no for others
No, for all served age groups

In 2024, when the rate paid to your facility by CCAP <u>did not cover</u> the cost of providing care, how big was the difference on average?

It was a little difference
It was somewhat of a difference
It was a big difference
I don't know

In 2024, when the rate paid to your facility by CCAP <u>was less than</u> the full rate of providing care to the children covered by CCAP, how was the difference most frequently made up?

The family pays the full difference
The family pays a portion of the difference
The family pays none of the difference
Another arrangement (please describe):_____

To what degree are the following issues a barrier to accepting children who receive subsidies?

	Not a barrier	Somewhat of a barrier	Moderate barrier	Extreme barrier	I don't know
Payment reimbursement rates are too low	☐	☐	☐	☐	☐
I have full enrollment without families who qualify	☐	☐	☐	☐	☐
It takes too long to receive payments	☐	☐	☐	☐	☐
There is too much paperwork associated with the system	☐	☐	☐	☐	☐
I struggle to receive administrative assistance if I need it	☐	☐	☐	☐	☐
Other (please describe):	☐	☐	☐	☐	☐
Other (please describe):	☐	☐	☐	☐	☐
Other (please describe):	☐	☐	☐	☐	☐

7.   REVENUES

This section is about the revenue your facility made in 2024 from various sources.

How much revenue did you make <u>in total</u> in 2024? *Please use numbers only. If your facility was not open for the entire year, please estimate based on the time you were open and the revenue you made. For example, if you made $50,000 and were open six months, you would project $100,000 for an entire year.*

_____

Please estimate the percentage of your total revenue obtained through each of the following sources. If you do not charge for any of the following items, please input a ZERO. *Percentages should add up to a total of 100%.*

	Percent of total 2024 revenue
Basic tuition	%
Registration fees	%
Additional services (e.g., meals and snacks, field trips, early drop-off)	%
Additional fees (e.g., late fees, holding fees)	%
Grants and donations (including fundraising events)	%
CCAP bonus payments	%
Other (please describe):	%
TOTAL	**100%**

What type of staff do you employ? *Check all that apply. Please include yourself when you consider this question. If you are the owner/operator of your facility, please select "full-time staff."*

Full-time staff
Part-time staff

How many of each staff type does your facility currently employ?

If you are an owner/operator of your facility, please include yourself as a full-time staff member.

	FULL-TIME number of staff	PART-TIME number of staff
Teachers		
Assistants		
Administrative staff		
Custodial/facilities staff		
Owner/operator		
Other (please describe):		

What is the average hourly wage for staff of each type employed at your facility?

Please enter the hourly wage only. If your staff are on annual salaries, please estimate the hourly wage to the nearest dollar.

	FULL-TIME average hourly wage	PART-TIME average hourly wage
Teachers		
Assistants		
Administrative staff		
Custodial/facilities staff		
Owner/operator		
Other (please describe):		

Which of the following fringe benefits do you offer your staff? *Check all that apply.*

	FULL-TIME	PART-TIME
Health insurance	☐	☐
Paid time off	☐	☐
Retirement benefits	☐	☐
Tuition waivers	☐	☐
Other	☐	☐
I do not offer fringe benefits to my staff	☐	☐

8.   HOME-BASED FACILITIES EXPENDITURES

Do you operate your facility out of your home?

No **(GO TO 10. Operating and Capital Expenditures on the next page)**
Yes

What is the <u>total square footage</u> of your home? *Include the square footage of your basement, garage, porch, and deck. <u>Do not include patios or yard space.</u>*

_____

What is the square footage of the space you use <u>exclusively for child care</u>? Do not include space that you use for any personal reasons whatsoever. *If there are no spaces in your home dedicated exclusively to child care, enter ZERO.*

_____

What is the square footage of the space you use <u>regularly but not exclusively for child care</u>? Include all spaces that you use for both personal and child care purposes. *If there are no spaces in your home that you use for both child care and personal use, enter ZERO.*

_____

How many hours per week <u>on average</u> do you provide care?

_____

<u>Outside of the hours that you provide care</u>, how many hours per week <u>on average</u> do you perform duties related to managing your child care program? *This can include bookkeeping, lesson planning, maintaining inventory, communicating with parents, cleaning, etc.*

_____

How many weeks per year are you <u>closed and not providing care</u>? *If your facility is open 52 weeks per year, enter ZERO.*

_____

<u>During the weeks when your program is closed</u>, how many hours per week <u>on average</u> do you spend performing duties related to managing your childcare program? *If your program is open year-round, enter ZERO.*

_____

9.   OPERATING AND CAPITAL EXPENDITURES

This section asks for expenditures for operating and capital expenses for 2024.

- **Please fill out each category to the best of your knowledge.**
- **If you do not know the exact number, please estimate.**
- **You may round up your expenditures - there is no need for decimals.**
- **If you do not have an expenditure for a given category, please input a 0 in that space.**

For each of the following types of <u>operating</u> expenditures, please input your <u>total 2024 expenditure.</u>

- Use numbers only.
- If you did not have this type of expenditure in 2024, please input a 0.
- If your facility was not open for all of 2024, please estimate based on your existing 2024 expenditure.

	Total 2024 Operating Expenditures
Employee salaries	
Employee benefits (e.g. health insurance, workers' comp, social security, retirement)	
Lease, mortgage, or other use-agreement	
Utility bills (e.g., water, electric, gas, internet, streaming services)	
Non-personnel insurance (e.g., business, renter's, auto)	
Kitchen supplies and food	
Care and hygiene items (e.g., wipes, diapers, cleaning supplies)	
Educational supplies and toys	
Office and other general supplies	
Enrichment activities (e.g., field trips, special classes, etc.)	
Facility repairs and maintenance (e.g., snow removal, lawn care, plumber, electrician)	
Vehicle and transportation maintenance and operations (e.g., gas, repairs, maintenance)	
Continuing education (e.g., staff training, professional development)	
Licenses, permits, and membership dues	
Advertising	
Child management software	
Interest payments and transaction fees	
Professional services (e.g., bookkeeping, taxes, legal)	
Other (please describe):	

For each of the following types of <u>capital</u> expenditures, please input <u>the total you spent in 2024</u>.

- **Use numbers only.**
- **If you did not have this type of expenditure in 2024, please input a 0.**
- **If your facility was not open for a full year in 2024, please estimate based on your existing 2024 expenditure.**

	Total 2024 Capital Expenditures
Outdoor improvements and equipment (e.g., fencing, playground equipment, sand)	
Appliances (e.g., fridge, range, microwave, air conditioning unit)	
Furniture and classroom equipment (e.g. cribs, cubbies, whiteboards)	
Vehicles (e.g. busses, vans)	
Outdoor maintenance equipment (e.g., lawn mower, snowblower)	
Technology and electronics (e.g., computer, printer, TV, tablets)	
Building repairs, upgrades, and remodeling (e.g., flooring, windows, countertops)	
Other (please describe):	

10. ORGANIZATIONAL CHARACTERISTICS

How long has your facility been in operation?

If you have been open for one year or longer, round up to the nearest year. If you have been open for less than one year, please enter the number of months you have been open.

_____ **Months**   _____ **Years**

Do you rent, lease, or own the residential or commercial space that houses your facility?

Rent
Lease
Own
Use space owned by another business/organization (e.g., church)
Something else (please describe): _____

Does your business currently use any child management software?

Yes
No

Does your facility currently carry business liability insurance?

Yes
No

What is the organizational structure of your facility?

Non-profit
Sole proprietor or partnership
Limited Liability Company (LLC)
Corporation
Other (please describe): _____

Do you participate in Bright & Early ND, our state's Quality Rating & Improvement System (QRIS)?

No **(GO TO Question 12.1)**
Yes

What is your quality rating?

Step 1
Step 2
Step 3
Step 4

Did you increase your tuition rates when:

	Yes	No
You became quality rated?	☐	☐
You increased your quality rating?	☐	☐

If you selected "Yes" to either question above, enter your average tuition rates before and after the change associated with your quality rating.

	Rate (e.g, $50, $100)	Structure (e.g., weekly, monthly)
Average before change		
Average after change		

11. SPECIAL NEEDS

Does your facility accept children with special needs?

Yes
No

Are any children with special needs <u>currently</u> enrolled at your facility?

Yes
No

Do you and your staff have special needs training and/or experience in any of the following areas? *Check all that apply.*

ADHD/ADD
Asthma
Autism
Developmental delay
Emotional/behavioral needs
Hearing/sign language
HIV/Hepatitis B
Monitors
Physical needs
Special health needs
Seizures
Visual needs

Is your facility wheelchair-accessible?

Yes
No

12. FINAL COMMENTS

12.1. **Is there anything you would like child care policy makers to know?** *If you need more room, please feel free to include extra paper or write on the back of the survey.*

_____

_____

_____

_____

_____

_____

_____

_____

Do you have any other comments that you would like to add? *If you need more room, please feel free to include extra paper or write on the back of the survey.*

_____

_____

_____

_____

THANK YOU FOR YOUR PARTICIPATION!

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