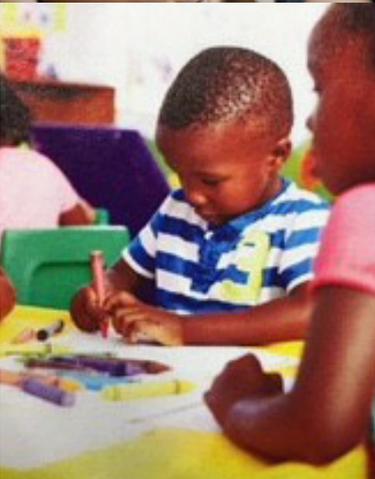


Durham County

PRESCHOOL SUPPLY & DEMAND STUDY

Executive Summary

2018



In the fall of 2017 Durham County contracted with Child Care Services Association (CCSA) to conduct a countywide assessment of the supply and demand of early care and education services in the County. Information for this study was gathered through parent and child care director surveys as well as two parent focus groups. This information was supplemented by census data, early care and education licensing and subsidy data, and information collected annually by CCSA for use in other agency services.

The goal of this project was to describe parent demand for preschool in Durham County and the capacity and needs of the existing early childhood provider community to meet that demand.

This Supply and Demand report provides new information about parents and their current preschool choices and arrangements, as well as their preferences. Through the use of this report, policy makers can begin to understand the value that parents put on preschool education, including those who are not currently using child care or preschool programs. The report helps refine the assessment of available preschool spaces by providing information about targeted enrollment of three and four year olds and identifies gaps in the early care and education community in the County.

This summary presents key findings from the Supply and Demand study.

Full report available at bit.ly/DCpreschoolSDstudy



PO Box 901
Chapel Hill, NC 27514
919-967-3272

www.childcareservices.org

General Preschool Population

There are just over **9,200** preschool-age children in Durham County from **3-5 years old**



Approximately **4,300** of these children live in low-income households (<200% FPL)

Support for Durham PreK



of families feel it is important for Durham County to make sure there are **plenty of quality preschool spaces for 4-year olds**

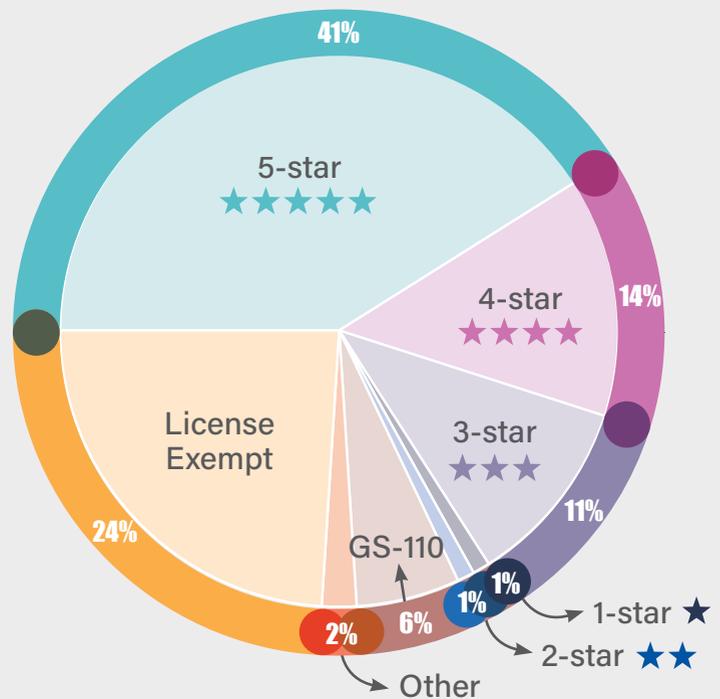


of families feel it is important for Durham County to **help pay for quality preschool** for Durham County's children



of families are **willing to contribute toward monthly taxes** for community-funded preschool, at an average of \$33/month

Programs by Licensure Status



Program Enrollment



Preschool Needs and Available Services



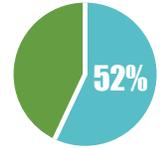
Approximately **4** out of every **5** families with children age birth-5 **send, or are likely to send, their children to preschool**



There are **more than 2** preschool-age children for every **1** preschool slot in a licensed center in Durham County

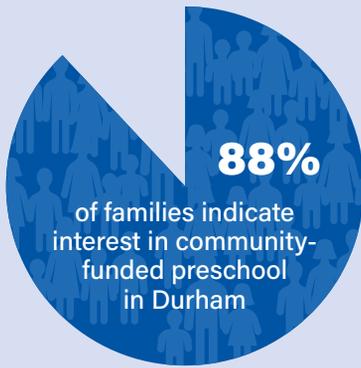


There are **nearly 3** children for every slot in a 4-5 star licensed center in Durham County



52% of center programs have **waiting lists** for 3-5 year olds

Interactive maps available at: bit.ly/DCoPreschoolStudyMaps



The strongest interest is reported by **Black/ African-American and Latinx families** as well as among **low-income families**



There are **6** low-income preschool children for every 1 currently publicly-funded preschool slot in Durham County (NC Pre-K, Head Start, DPS)

92% of families want or need cost-free preschool services

In the event that Durham PreK services would be fee-based, not free,

79% of families support the use of sliding fee scales



For a four or five year old, **\$921 per month** covers the median cost of care in 4-5 star programs



Elementary schools are preferred by **54%** of families for Durham PreK

Private preschools/ child care centers are preferred by **49%** of families for Durham PreK

87% of families would like services for **more than 6** hours per day

More than 1 in 4 Durham census tracts with 50+ low-income preschoolers have **no publicly-funded preschool slots**

Closeness of programs is considered essential for

53% of low-income families

33% of Durham child care programs provide **some transportation services**





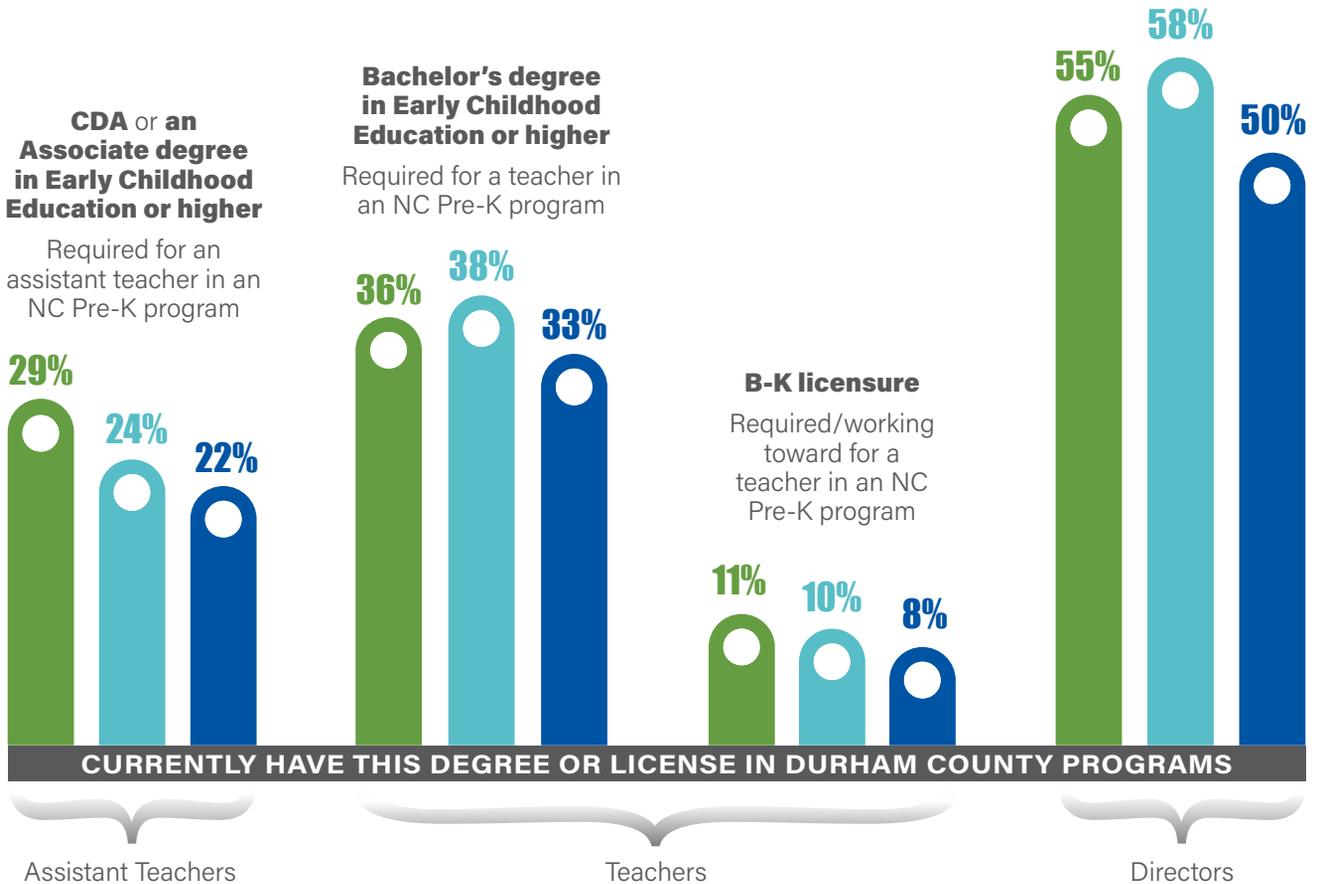
Current Staff Education and NC Pre-K Requirements



- in all early childhood programs
- in 4- or 5-star programs
- in programs expressing interest in becoming Durham PreK programs

Bachelor's degree in Early Childhood Education or higher

Required for a director in an NC Pre-K program



Public School vs. Early Childhood Staff Compensation

Public school principals' starting salaries \$29.69

All directors' median salaries \$24.02

Median directors' salaries \$20.91

in programs interested in becoming Durham PreK providers

Public school teachers' starting salaries \$18.90

All teachers' median starting salaries \$12.00

Median teachers' starting salaries \$12.00

in programs interested in becoming Durham PreK providers

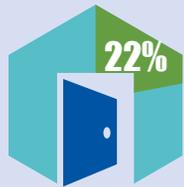
Public school assistants' starting salaries \$11.90

All assistants' median starting salaries \$10.50

Median assistants' starting salaries \$10.00

in programs interested in becoming Durham PreK providers

Early Childhood Staff Turnover



22% of assistant teachers leave each year



18% of teachers leave each year

Durham PreK Interest, Strategies and Challenges



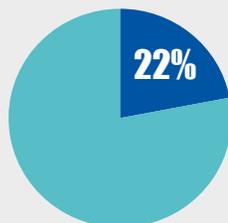
68% of Durham County early care and education programs expressed interest in becoming a Durham PreK site (Exclusive of Durham Public Schools)



1,939 Spaces could be created or converted to become Durham PreK spaces by these programs

The toughest challenges for programs include **teacher salaries, staff educational requirements and supporting culturally and linguistically diverse populations**

Durham PreK Concerns



22% of programs expressed that they are **extremely concerned about loss of enrollment** should the County move forward with the creation of a Durham PreK program

POLICY RECOMMENDATIONS

These policy recommendations are designed to facilitate equity of access to high quality early education, providing the foundation for a successful, productive life for each of Durham County's young children.

Develop Durham PreK as a universal program open for all of Durham's 4-year olds

To meet the needs of children and parents, a voluntary universal program should be developed providing free early care and education to 4 year olds living in families at or below 300% of the federal poverty level. For those 4 year olds whose family income is above 300%, a sliding fee scale provides scaled assistance to keep middle class families economically sound as they access high quality preschool services for their children.

Make Durham PreK supportive of working families

Financial assistance provides just one necessary support for working families to access early care and education programs. The reality of the cost of living in Durham County is that parents need to work full-time. Most employers expect their full-time employees to be on the job for eight to nine hours a day all year long. Programs offering care for fewer hours or only during the school year often are not options for parents. Further, subsidized care funded for fewer hours or days means parents are required to pay for full-time care out of their own pockets.

Many parents, especially in low-income families, rely on bus service for the necessary tasks of daily life. Without transportation support, parents are unable to get their children to and from child care each day. However, transportation services are costly and pose additional liability issues for programs. Financial support for this service allows parents to access a wider range of early childhood programs.

Ensure that Durham PreK programs respect our children and families

Research shows that high quality, developmentally appropriate programs lead to positive outcomes for children, communities, and business. Further, parents are seeking play-based curricula that balance social and emotional development with academic achievement. In keeping with Durham County's values, programs must be inclusive and celebrate the diversity of our community. Parents provide an often overlooked resource for strengthening programs by providing information about their children and their culture.

Provide resources to lift up our teachers

Teachers are the backbone of a child's experience in an early care and education setting. Keeping qualified teachers in the classrooms should be a priority for Durham. While good teachers begin their career because of their dedication to the education of young children, life's demands often present conflicts as bills and other financial commitments increase. However, higher salaries and benefits for these good teachers are too costly for programs reliant on young parents' monthly tuition payments. Funds specifically earmarked for qualified teachers ensure increased compensation.

Knowledge of child development and effective teaching strategies has grown tremendously over the past few decades. While curricula provide a solid base for effective teaching, understanding the theory and science behind these outlines will produce better results for children. Teachers can only gain this knowledge through coursework at colleges and universities. Many teachers, however, have not had the opportunity to start and/or finish their degrees. Providing minimum educational requirements and a structure to attaining these requirements will increase teachers' abilities to provide the best possible education to our youngsters.