

2018 New Hampshire Child Care Market Rate Report



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Key Findings

Survey Goal and Response Rate

The objective of the Market Rate (MR) Survey was to gather data through a survey on the current rates for child care and early education services in at least 60% of licensed New Hampshire providers. The final completion rate achieved was 62.47%. Out of a total of 834 licensed programs, 513 survey responses were received either via mail or contacted by phone, and then analyzed for this report. Additionally, four survey packets were returned as undeliverable and another four were returned either blank or unidentifiable. The goal of achieving a 60% response rate from each region was reached with the exception of the Southern region, as seen in the detailed regional response rate table below.

Region	Total Programs	Programs Responding	Response Rate
Central	162	105	64.8%
Eastern	171	107	62.6%
Northern	64	44	68.8%
Southern	325	186	57.2%
Southwestern	112	71	63.4%

Table 1. Total number of programs and survey response rate by region

Number of Licensed Programs

There has been a continual, gradual decline in the number of licensed NH programs over the last 15 years. In 2001, there were 1207 licensed programs, while in 2018 the number declined

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to 834, a 31% decrease. More recently programs declined 8% since 2016 and 12% since 2014.

This trend of fewer and fewer licensed programs significantly reduces access for families.

Licensed Capacity

Consistent with US trends, mean licensed capacity has increased, from 38.49 children in 2001 to 54.74 in 2018. Program size increases do not necessarily recapture children from programs that have closed. For example, when one program closes, a parent may not be able to immediately find an available slot in a nearby facility that is similar in quality and price.

Program Types

Center based programs continue to be the largest segment, increasing from about one-third (32%) in 2001 to 259 (51.5%), half of all programs in 2018. The percentage of proprietary programs has been reduced, to 52.% in 2018 down from 60.9% in 2016.

Schedule of Available Care

54.6% of licensed programs offer families options for both full-time and part-time care, a slight decrease from 56.2% in 2016. Such programs provide care an average of 51.7 hours per week while programs offering only part-time care (24.1%) operated an average of 21.7 hours per week.

Care Outside of Conventional Hours and Care for Sick Children

A decreasing number of programs offer special care outside of conventional hour range of care. Very few licensed NH programs offer care from 7-9 PM (N=5), 9-11PM (N=5), and overnight care (N=2). Only one provided care primarily for sick children.

DHHS Scholarships

More than three of every five programs (63.8%) have an arrangement with DHHS to receive scholarships¹ for eligible enrolled children, which is approximately the same as in 2016 (65.3%).

Rate Intervals

More than three of every four full-time programs (76.6%) charged by the week; the most common way of charging parents in part-time programs was by the day (43.2%); and in School Age programs by the week.

Rates

For full-time programs, the mean weekly rates by ages of children were: 0-12 months (\$237.47, up 5.% since 2016); 13-24 months (\$221.03, up 3.6%); 25-35 months (\$215.84, up

¹ The NH Child Care Scholarship program helps eligible families with low incomes to pay for child care while they are working, looking for work. Going to school or participating in training activities. For more information about the program, visit the Department website: <https://www.dhhs.nh.gov/dcyf/cdb/eligibility.htm>

6.5%); 36-59 months (\$197, up 4.7%), and 60-71 months (\$180.33, up 0.7%). Rates increased in all categories. Overall, rates in the Southern and Eastern regions were highest for all age ranges.

Scholarship Cost Share

More than half of responding programs (58.5%) charged the DHHS-assigned cost share to parents of children receiving a NH Child Care Scholarship, and 60.2% charged parents the difference between the maximum weekly standard rate (WSR) and the actual charge.

ABOUT THE MARKET RATE SURVEY

Overview

This report provides selected findings of the current and nine previous New Hampshire Early Care and Education Market Rate Survey among licensed providers in the state of New Hampshire.

According to Grobe, Weber, Davis, Kreader, and Pratt (2008, p.1),

Child care market rate studies emerged in the late 1980s as Congress adopted a market-based approach to funding child care. In 1990, the federal government began a major investment in child care with the passage of the Child Care and Development Block Grant Act (42 U.S.C 9858 et. Seq.). In 1996, Congress combined multiple funding streams into the Child Care and Development Fund (CCDF) and increased its investment in child care. Since 1998, the Department of Human Services rule for receipt of CCDF funds has included a requirement that states, territories, and tribes demonstrate access to child care for parents who receive a subsidy by referring to a market rate survey conducted no earlier than two years prior to the effective date of the current Plan.

The MR#10 mission was to conduct a survey by mail (with telephone follow-up when necessary) of licensed New Hampshire providers and to report current rates charged to consumers on a statewide basis for various types of care to specified ages of young children.

MR#10, like the previous nine MR surveys, asked providers to share data regarding their fees as currently charged (e.g. hourly, daily, weekly or other). This approach provides a realistic

picture of what currently exists in New Hampshire, and also presents a detailed and therefore more nuanced picture of child care rates.

The report provides general information on the wide range of criteria surveyed, which is designed for the general reader, but also includes more detailed information designed for the specialist. This report will be available online through the Bureau of Child Development and Head Start Collaboration via the Department of Health and Human Services (DHHS) website; a copy will also be provided to New Hampshire's Child Care Resource and Referral (CCR&R) organization, Child Care Aware of NH. A public presentation will be held July 18, 2018 to review the results with providers and other interested citizens. An Executive Summary will be posted on the Department of Health and Human Services website.

Cautions

There are a few cautions to be considered in reviewing this final report.

1. We believe it would be inappropriate to compare programs that charge by the hour with those that charge by the day. Once one creates an *Arbitrary Conversion Factor* (for example, a daily rate is the equivalent of 6.1 hours), then the result may no longer represent what actually exists. Some programs may move from charging a part-time rate to a full-time one at 6.1 hours, others at 5.7 and still others at 7 hours. It is very tempting to make such conversions, because they appear to simplify how rates are actually charged but doing so is far less accurate than reporting rates as charged. As Emlen (2005, p. 2) notes,

A more vexing problem in defining the child-care market arises from how providers charge for care: whether by the hour, day, week, or month. Why should that be a problem? Well,

because how they charge creates different markets. This may seem just an artifact of language, but it is not. By-the-month care and by-the-hour care create price differentials that cannot validly be converted into one single rate by any a priori rational formula such as supposing a 9-hour day, 5-day week, or 23-day month. One is stuck with a choice of obtaining multiple modes of charging, reporting all rates separately by mode of charging, or else converting and combining the rate data into an estimate with an unknown but significant amount of distortion.

2. As in previous NH child care market rate surveys, this report does not reflect the true costs of child care. The real cost of care is an essential, if difficult to quantify, piece of the complete picture of early care and education in New Hampshire. One of many reasons is the subsidy that providers and staff provide through free, undocumented activities and donations.

3. This final report presents a snapshot, a brief moment in time, of the market rates on a single day, March 7, 2018. We believe it is a relatively accurate picture of rates for that day. However, some rates will have changed, and some facilities may have closed while others have opened since that day. Therefore, it is safest to assume that the rates on March 7, 2018 are most reliable for that date only.

4. Results are presented based upon responses to this year's Market Rate Survey instrument, and therefore the data analyzed, and trends identified can only consider information from those programs (62.47%) that responded to the survey. This may be the primary reason that some numbers presented in this report are different than numbers reported from other sources, or from utilizing other means of collecting data.

5. There have been several changes to the list of regions, and also towns within those regions. This means that it is not possible to compare regional differences between these findings to those from across the previous nine market rate studies.

6. This project was funded at 50% of some earlier projects, with a survey goal of 60%, rather than the earlier MR survey response goals of 90%. While every effort has been made to exceed a 60% response rate from each of five regions, variables may still be slightly skewed as a result of the characteristics of responding programs. In addition, minor changes over time have been made to providers listed in each licensing region and in Child Care Resource and Referral regions. As a result, care should be exercised in comparing these results to results in previous Market Rate Surveys.

Methodology

Survey Sample

A list of 834 licensed programs was provided by DHHS on February 21, 2018, and a Master List was then created, and utilized to generate labels for envelopes of the outgoing survey packets.

Survey Development and Design

Only minor changes have been made to the first three pages of the four-page survey protocol (Appendix A) over the past 14 years. This has been intentionally done to allow comparison to be made between future survey results and current and previous survey results to demonstrate changes over time and identify trends. Historically, surveys always included questions based on the first Wednesday in November; this year the date identified was the first Wednesday in March. Topics and questions on page four vary from year to year, but have always contained questions related to a DHHS identified issue. In this year's survey DHHS provided the actual questions.

Survey Distribution

This year surveys were mailed to every licensed child care and early education program on March 5 and expected arrival was March 6 or March 7. The survey packet contained brief Instructions, the four-page Survey, and a Market Rate Prize Drawing Ticket.

Telephone Follow Up Calls

The Market Rate project team negotiated with the well-respected UNH Survey Center to conduct the follow up calls. This phase of the project was initiated on March 27, 2018 and continued until we reached a total response rate of 63%, to allow for the elimination of any surveys that were unusable, while still achieving the 60% response rate goal. A few surveys continued to arrive by mail.

Response Rate

Of the 834 programs to which surveys were mailed, 4 (0.48%) were classified as *undeliverable* and 4 were returned *blank* and *unidentifiable*. In the remaining group of programs, completed surveys were obtained for 513. In entering data, 8 of these were confirmed as *closed just for that day* or *closed forever* and 1 was *license exempt*, leaving 504 surveys with data that could be coded. This resulted in a final total response rate of 62.47%.

Undeliverable	4
Return blank and unidentifiable	4
Closed	8
License Exempt	1
Licensed with Data	504
Total	521

Table 2. Response Rate Breakdown

Market Rate Prize Drawing

The ticket offered providers that returned a completed survey by March 21 the ability to be entered in a prize drawing for their choice of a gift card for Market Basket, Barnes & Noble,

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Staples, Dunkin Donuts, Shaws, or Irving gas. Gift card amounts ranged from \$10.00 to \$100.00. Providers that complied with the rules were combined and winners were randomly drawn until all gift cards had been awarded. Gift cards were mailed to winning providers at the end of June.

Market Rate Survey Verifications

RFP 2.7.2 Contact the statewide Child Care Resource and Referral agency to obtain child care rate information for at least 5% of responding programs.

In order to verify the accuracy of provider responses in regard to rates charged, project staff randomly selected 5.6% of the surveys of responding providers and provided only the program Town, Program Name, and Licensing Number to Child Care Aware of New Hampshire (CCA of NH). This method ensured program details provided on survey responses remained confidential, and that there was no possibility of market rate responses influencing CCA of NH responses. We requested CCA of NH provide us the highest rate charged parents for full-time preschool (aged 3-5 years) care. This age category is typically the largest component of licensed child care, and if we split the 5% requested into different age or other subcategories the numbers would be too small to be significant.

RFP 2.7.3 Compare program rate information received in Section 2.7.2 to the survey information submitted by the child care program to address any discrepancies.

A 5.16% response [N=43] for validation was achieved, slightly exceeding the target of 5%, with 79% of programs [N=34] having a match between the rates they provided on the Market Rate Survey form, and the rate that CCA of NH independently recorded.

	NUMBER	PERCENTAGE
Rates Matched	35	81.3%
Program Was Closed	2	4.6%
No Rate Was Provided	1	2.3%
CCA of NH Rate Higher Than Survey Rate	2	4.6%
CCA of NH Rate Lower Than Survey Rate	3	6.9%

Table 3. Program Rate Verifications

We contacted providers in each of the latter two categories and found minor discrepancies (\$5-\$10) were from one of three reasons: a) a result of minor time differences in data collection by the MR survey compared to CCA of NH identified rates. Some providers recently changed their rates. As a result, existing rates were accurate at the time of the survey and also at the time of CCA of NH collection, but each was recorded at a slightly different time. Many CCA of NH rates were recorded after March 15, while many of the randomly selected MR surveys were received prior to that date; or b) an artifact of conversions from monthly or in one case annual rates to weekly full-time rates; or c) in a single case a rate was mistakenly recorded for infants rather than older preschoolers; this was corrected. In no case did we find an intentional effort to record a rate that was not an accurate reflection of prices charged parents.

Licensed New Hampshire providers submitted reliable full-time preschool aged rate responses on the Child Care Market Rate Survey, a finding with which Karen Abbott, Lead Child Care Resource & Referral Outreach Coordinator concurs. Where there were discrepancies with CCA of NH listed rates, they were minor, and primarily explained by CCA of NH conversions of monthly or in one case annual rates to weekly full-time rates.

Date Entry and Analysis

Data from each survey was entered into a specially designed Excel template, and an application was then created in Python to analyze the data. The application we created also automatically generated draft sections of the report.

Report

A draft report was submitted on June 29, and feedback was solicited. The report was submitted on in mid-July.

NH Programs

Proprietary and Not-for-Profit Programs

Slightly more than half of licensed programs in New Hampshire (52.2%) were *proprietary*², while the rest (47.8%) identified themselves as *not-for-profit*. The percentage of provider reported *proprietary* programs has decreased from 60.86% in 2016. The response rate on this question was 99.21%.

Types of Programs

The New Hampshire Child Care Program Licensing Rules (2017) define the following three general types of programs.

“Center based program” means any program owned and operated by one applicant which is not licensed as a family or family group child care home and is licensed to provide any of the following types of child care:(1) Group child care center; (2) Infant and toddler program; (3) Night care program; (4) Preschool program; (5) School-age program; or (6) Any combination thereof.

“Family group child care home” means “family group day care home” as defined in RSA 170-E:2, IV(b), namely “an occupied residence in which child day care is provided for less than 24 hours per day, except in emergencies, for 7 to 12 children from one or more unrelated families. The 12 children shall include all children related to the caregiver and any foster children residing in the home, except children who are 10 years of age or older. In addition to the 12 children, up to 5 children attending a full day school program may also be cared for up to 5 hours per day on school days and all day during school holidays.”

“Family child care home” means “family day care home” as defined in RSA 170-E:2, IV(a), namely “an occupied residence in which child day care is provided for less than 24 hours per day, except in emergencies, for up

² Proprietary in this usage refers to a program identified as for-profit regardless of whether there is a profit.

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to 6 children from one or more unrelated families. The 6 children shall include any foster children residing in the home and all children related to the caregiver except children who are 10 years of age or older. In addition to the 6 children, up to 3 children attending a full day school program may also be cared for up to 5 hours per day on school days and all day during school holidays.”

In New Hampshire, the highest percentage of licensed programs were *Child Care Centers* (51.5%), almost unchanged from 51.1% in 2016, followed by *School Age (only) Programs* (12.1%), *Family Group Child Care* programs (9.9%), *Family Child Care Home* programs (9.3%), *Nursery Schools/Programs* (8.6%), *Other* (6%), and *Montessori* programs (2.6%). The response rate on this question was 99.8%.

Program Type	2018	2016
Child Care Center	51.49%	51.08%
School Age	12.13%	13.31%
Family Group Child Care	9.94%	10.07%
Family Child Care Home	9.34%	10.25%
Nursery School/Program	8.55%	11.15%
Other	5.96%	1.80%
Montessori Program	2.58%	2.34%

Table 4. Program Types

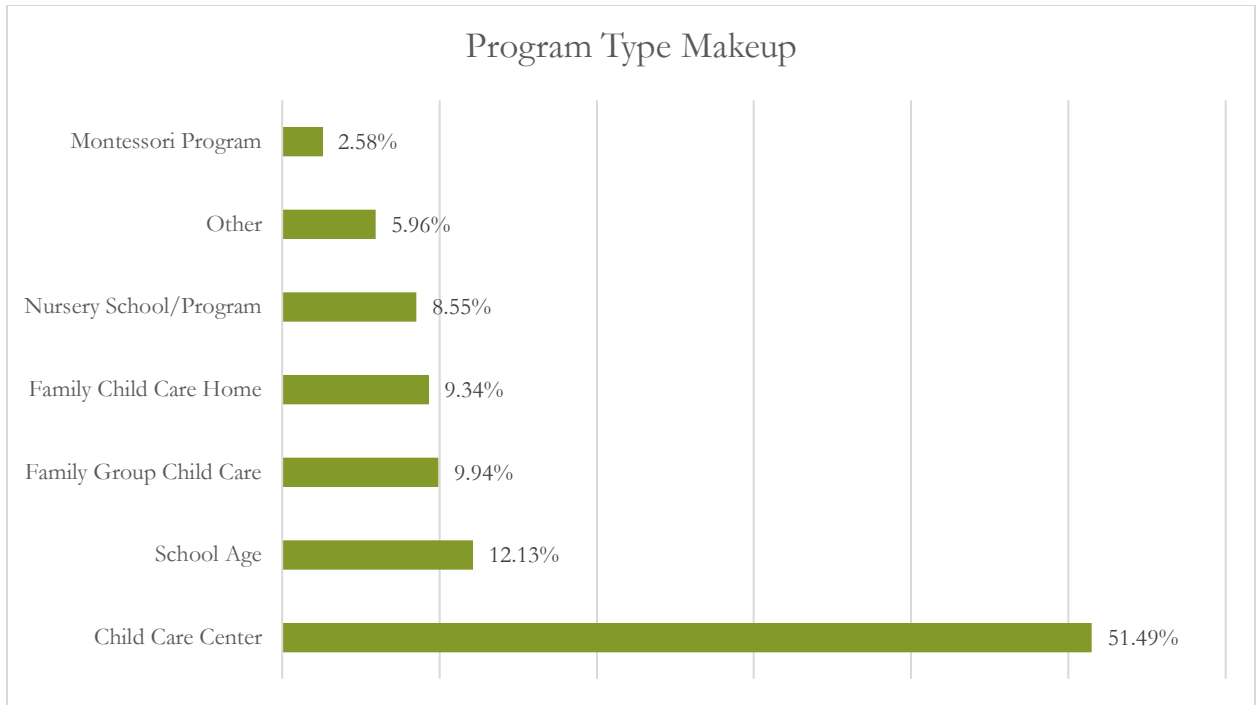


Chart 1. Program Type Makeup.

Quality Indicators

Among 473 responses, 149 (31.5%) survey respondents indicated their programs were Licensed Plus and 59 programs (12.7%) were NAEYC accredited.

Head Start

According to survey respondents, there were 43 (8.6%) Head Start. This percentage has increased from 5.7% in 2016.

DHHS Reimbursements

More than three out of five licensed programs (63.8%) have an arrangement with DHHS to receive scholarships for enrolled children, a slight decrease since 2016 (65.3%).

Months, Days, and Hours of Operation

Slightly more than three out of four licensed programs (78.6%) operated throughout the year. About one fifth (20.4%) of programs closed in July 15.1% in August, and 5.2% in June. This summer time closure trend has not changed significantly since 2016. Programs in New Hampshire operated within a broad range of hours per week (from 7.5 to 120 hours), with an average of 44.47 and median of 50 hours. Programs operating Partial Day Only had an average of 21.70 and median of 21.25 hours per week, while programs operating Full Day Only and Full and Partial Day had an average of 51.74 and median of 52.5 hours. There remained very little care available on weekends among all programs. Only two programs were open on Saturday or Sunday, which has not changed since 2016.

Care Outside of Conventional Hours and Care for Sick Children

There were just 7 (1.4%) programs that offered special care, a decrease from 11 (2%) in 2016. Among those, 5 provided care from 7 to 9 PM, 5 provided care from 9 to 11 PM, 2 provided overnight care, and 1 provided care primarily for sick children.

Schedule

More than half of licensed programs (54.58%, down slightly from 56.17% in 2016) offered parents options of full and part-time care. Almost one-fourth (24.10%) offered only a partial day option, and 21.31% offered full day only programs.

Licensed Capacity, Enrollment, and Attendance

We wanted to differentiate between licensed capacity (the maximum number of children a program has been licensed to serve), the desired capacity (the number a program would like to enroll), the actual enrollment (the number of children a program had enrolled on March 7, 2018), and attendance (the number of children attending on that day).

The mean and median Licensed Capacity among all programs in New Hampshire were 55 and 40 children, while the reported average (mean) and median enrollment were 45 and 31 children. The mean and median Desired Capacity were 49 and 36 children. The mean and median number of children attending on March 7, 2018 was still lower, at 36 and 24. Of those attending on March 7, 2018, the mean and median number of full-fee paying children was 82% and 90%. Of those attending, on average 25.14% of children had DHHS scholarships, a noticeable increase from 17.60% in 2016, but close to 24.23% in 2014.

Charges to Families Receiving Scholarships

For children receiving NH Child Care Scholarship funds, more than half (58.5%) of licensed programs charged the DHHS-assigned cost share to parents and almost one fifth (17.6%) did not. The remaining programs (23.9%) chose 'Does not Apply'. The response rate for this question was 91.3%. Similarly, for children receiving NH Child Care Scholarship funds, 60.2% charged parents the difference between the maximum weekly standard rate (WSR) and the actual charge. 14.9% did not charge the difference while 24.9% chose 'Does not Apply'. The response rate is 89.3%.

The mean and median of monthly cost-share amount received for full-time children was \$1174.10 and \$480.00, and \$307.00 and \$120.15 for part-time children. The response rates were 12.1% (N=61) and 2.8% (N=14). The mean and median of total co-pay for full-time children was \$1289.13 and \$308.00, and \$248.69 and \$122.56 for part-time children. The response rates are 16.7% (N=84) and 8.3% (N = 42).

Sliding-fee Scale

Sixty (12.5%) programs offered a sliding fee scale to families, while 420 (87.5%) did not. The response rate is 95.2%.

NH Full-Time Child Care Rates

Most Frequent Rate Type

Weekly rates were by far the most common way of charging for full-time care and utilized by more than three quarters of providers (76.6%), a slight decrease from 2016 (78.7%). Other types of charge frequencies were daily (11%), up since 2016 (9%), monthly (10.2%), hourly (1.7%), and bi-weekly (0.6%).

Rate Type	Number of Programs	Percentage
Weekly	278	76.58%
Daily	40	11.02%
Monthly	37	10.19%
Hourly	6	1.65%
Bi-weekly	2	0.55%

Table 5. Rate Frequencies

Infant Care (6 weeks to 12 months)

Weekly Rates

The majority of programs (83.3%) charged for full-time infant care by the week, a slight decrease from 2016 (85%); 180 programs charged for full-time infant care by the week. The full-time weekly rate for children 6 weeks to 12 months ranged from \$125.00 to \$394.00. The full-time weekly rate for children 6 weeks to 12 months averaged (mean) \$237.47, which increased

5%, from \$226.08 in 2016. The median full-time weekly rate for children 6 weeks to 12 months was \$232.50, which increased 5%, from \$220.00 in 2016.⁴

Full-time 6wks-12months weekly	Amount
Mean	\$237.47
Median	\$232.50
Std. Deviation ³	47.80
50 th Percentile	\$232.50
55 th Percentile	\$235.00
60 th Percentile	\$240.00
75 th Percentile	\$265.00

Table 6. Full-Time Infant Care Weekly Rates

Child Care Centers (CCC) charged for infant care at consistently higher rates than either Family Group (FGCC) Child Care programs or Family Child Care Home (FCCH) programs. The mean weekly infant care rate at Child Care Centers was the highest (\$248.59), followed by Family Group Child Care (\$183.57), and Family Child Care Home programs (\$171.92). Child Care Centers charged \$65.02 (35.4%) more than Family Group Child Care programs, and \$76.67 (44.6%) more than Family Child Care Home programs.

³ “The **standard deviation** is a statistic that tells you how tightly all the various examples are clustered around the mean in a set of data. When the examples are pretty tightly bunched together and the bell-shaped curve is steep, the standard deviation is small. When the examples are spread apart and the bell curve is relatively flat, that tells you have a relatively large standard deviation” (Niles, n.d.).

Type	CCC	FGCC	FCCH	All
N	147	14	13	180
Min	\$150.00	\$150.00	\$125.00	\$125.00
Max	\$394.00	\$250.00	\$200.00	\$394.00
Mean	\$248.59	\$183.57	\$171.92	\$237.47
Std. Deviation	43.14	27.2	23.76	47.8
50 th Percentile	\$238.00	\$182.50	\$175.00	\$232.50
55 th Percentile	\$241.20	\$185.00	\$175.00	\$235.00
60 th Percentile	\$250.00	\$185.00	\$178.00	\$240.00
65 th Percentile	\$254.50	\$191.75	\$187.00	\$247.70
70 th Percentile	\$265.00	\$200.00	\$190.00	\$250.00
75 th Percentile	\$272.50	\$200.00	\$190.00	\$265.00

Table 7. Full-Time Infant Care Weekly Rates by Program Type

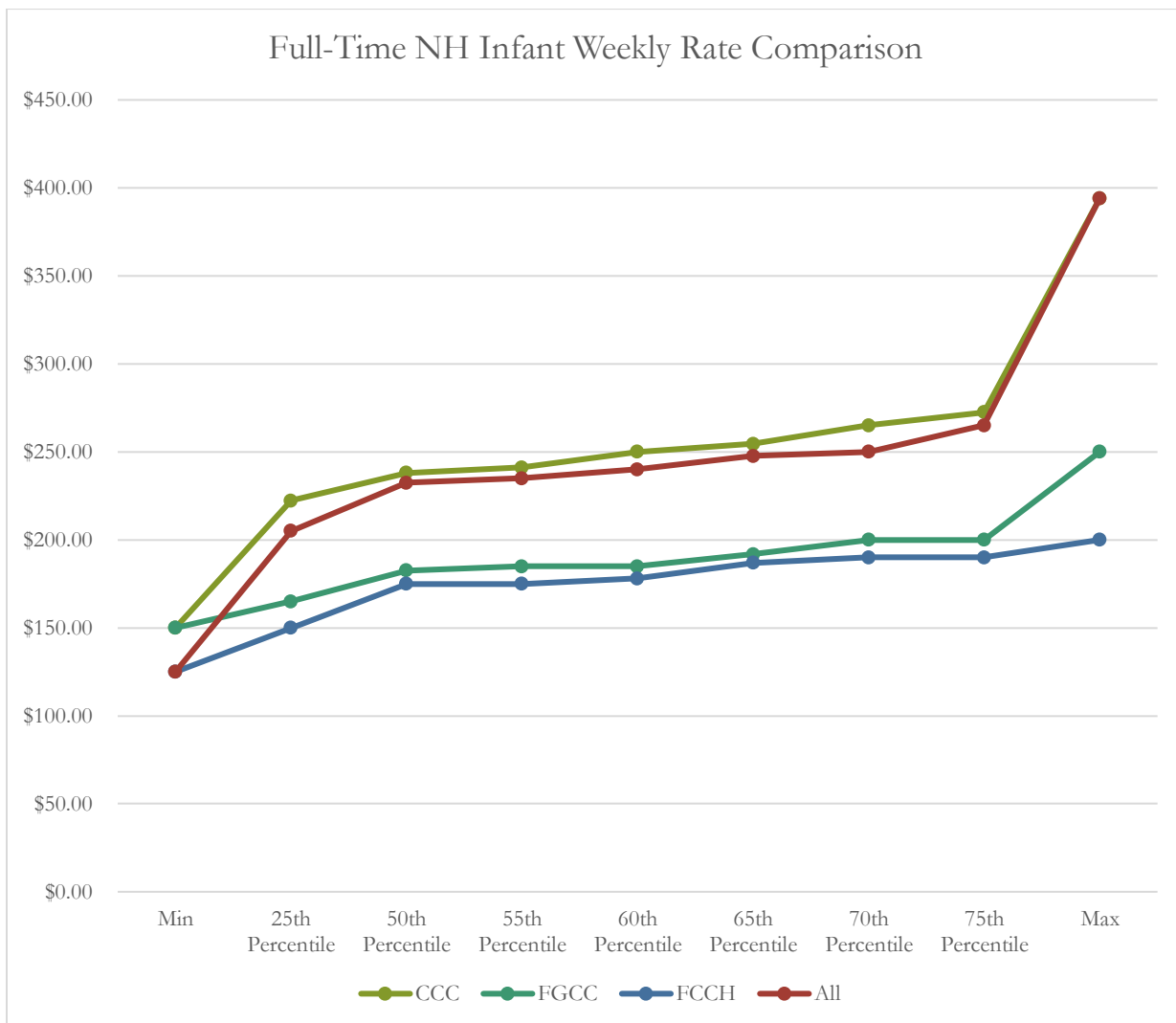


Chart 2. Full-Time Infant Weekly Rate Comparisons by Program Type

Daily Rates

A few full-time Infant programs (7.87%) charged a daily rate, a decrease from 9.76% from 2016. The mean daily rate for children 6 weeks to 12 months was \$41.89, almost unchanged from \$42.08 in 2016, while the median daily rate for children 6 weeks to 12 months was \$40.00, which has dropped 5% from \$42.00 of 2016.

Full-time 6wks-12months daily	Rate Amount
Mean	\$41.89
Median	\$40.00
Std. Deviation	11.08
25 th Percentile	\$38.00
50 th Percentile	\$40.00
55 th Percentile	\$42.40
60 th Percentile	\$43.00
75 th Percentile	\$44.50
90 th Percentile	\$56.00

Table 8. Full-Time Infant Care Daily Rates

Toddler Care (13-24 months)

Weekly Rates

The majority of programs (82.4%) charged for full-time toddler care by the week, up slightly from 2016 (80.5%). There were 224 programs provided full time care for toddler children in March 2018 with weekly rates. Among those, 165 were Child Care Center programs, 27 Family Group Child Care programs, and 26 Family Child Care Home programs.

The full-time weekly rate for children 13-24 months ranged from \$125 to \$374.00. The full-time weekly rate for children 13-24 months averaged (mean) \$221.03, a 3.6% increase from \$213.32 in 2016, while the median full-time weekly rate for children 13-24 months was \$220, a 6.8% increase from \$205.00 in 2016.

Full-time 13-24 months weekly	Amount
Mean	\$221.03
Median	\$220.00
Std. Deviation	43.23
50 th Percentile	\$220.00
55 th Percentile	\$223.95
60 th Percentile	\$225.00
75 th Percentile	\$240.00

Table 9. Full-Time Toddler Care Weekly Rates

Child Care Centers charged for toddler care at consistently higher rates than either Family Group Child Care or Family Child Care Home programs. The mean weekly toddler care rate at Child Care Centers was the highest (\$235.25), followed by Family Group Child Care (\$180.93) and Family Child Care Homes (\$172.60). Child Care Centers charged \$54.32 (30%) more than Family Group Child Care programs, and \$62.65 (36.3%) more than Family Child Care Homes.

Type	CCC	FGCC	FCCH	All
N	165	27	26	224
Min	\$165.00	\$150.00	\$125.00	\$125.00
Max	\$374.00	\$225.00	\$250.00	\$374.00
Mean	\$235.25	\$180.93	\$172.60	\$221.03
Std. Deviation	38.63	21.53	27.95	43.23
50 th Percentile	\$225.00	\$180.00	\$170.00	\$220.00
55 th Percentile	\$230.00	\$180.00	\$173.75	\$223.95
60 th Percentile	\$232.40	\$180.00	\$175.00	\$225.00
65 th Percentile	\$236.80	\$184.50	\$175.00	\$230.00
70 th Percentile	\$245.00	\$185.00	\$177.00	\$233.20
75 th Percentile	\$253.00	\$192.50	\$187.50	\$240.00

Table 10. Full-Time Toddler Care Weekly Rates by Program Type

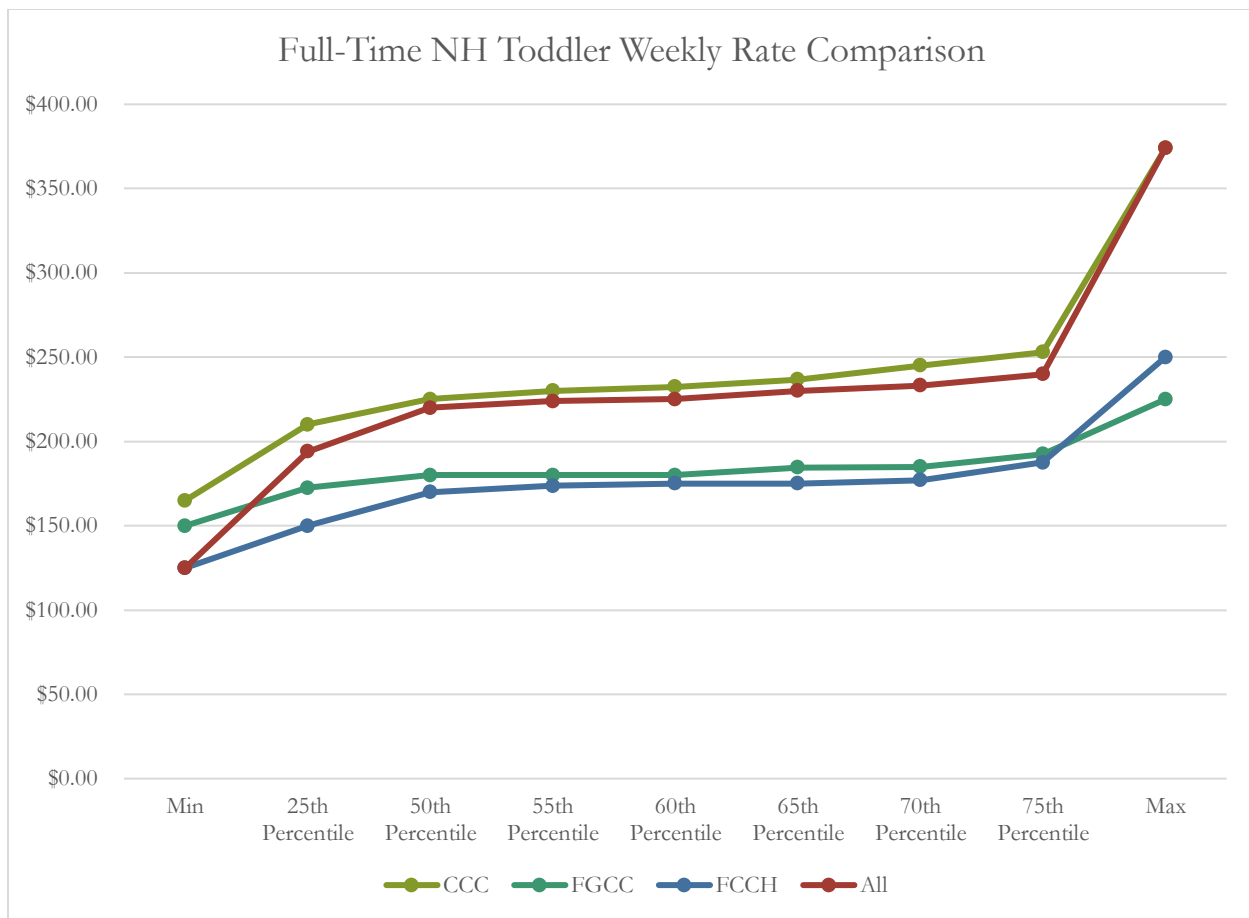


Chart 3. Full-Time Toddler Weekly Rate Comparisons by Program Type

Daily Rates

A few full-time toddler programs (9.2%) charged a daily rate, down from 12.7% in 2016. The mean daily rate for children 13-24 months was \$37.64, down slightly from 2016 (\$38.82), while the median daily rate for children 13-24 month was \$37.00, a \$2.00 (5.4%) decrease from \$39.00 in 2016.

Full-time 13-24 months daily	Amount
Mean	\$37.64
Median	\$37.00
Std. Deviation	8.11
50 th Percentile	\$37.00
55 th Percentile	\$38.00
60 th Percentile	\$38.40
75 th Percentile	\$40.00

Table 9. Full-Time Toddler Care Daily Rates

Young Preschool Age Care (25-35 months)

Weekly Rates

The majority of programs (78.8%) charged for care by the week, a decrease from 81.6% in 2016. There were 227 programs providing full time care in March 2018 that charged weekly rates. Among those, 170 were Child Care Center programs, 24 Family Group Child Care programs, and 23 Family Child Care Home programs.

The full-time weekly rate for children 25-36 months ranged from \$125.00 to \$369.00, While the full-time weekly rate for children 25-35 months averaged (mean) \$215.84, which increased 6.5% from \$202.75 in 2016. The median full-time weekly rate for children 25-35 months was \$210.00, which increased 5% from \$200.00 in 2016.

Full-time 25-35 months weekly	Amount
Mean	\$215.84
Median	\$210.00
Std. Deviation	39.67
50 th Percentile	\$210.00
55 th Percentile	\$215.00
60 th Percentile	\$220.00
75 th Percentile	\$234.00

Table 9. Full-Time Young Preschooler Care Weekly Rates

Child Care Centers charged for young preschooler care at higher rates than either Family Group Child Care and Family Child Care Home programs. The mean weekly young preschooler rate at Child Care Centers was the highest (\$226.34), followed by Family Group Child Care programs (\$183.75), and Family Child Care Home programs (\$174.57). Similarly, the median weekly rate at Child Care Centers was the highest (\$220.00), followed by Family Group Child Care (\$177.50) and Family Child Care Homes (\$175.00).

	CCC	FGCC	FCCH	All
N	170	24	23	227
Min	\$145.00	\$150.00	\$125.00	\$125.00
Max	\$369.00	\$225.00	\$250.00	\$369.00
Mean	\$226.34	\$183.75	\$174.57	\$215.84
Std. Deviation	38	20.97	25.98	39.67
50 th Percentile	\$220.00	\$177.50	\$175.00	\$210.00
55 th Percentile	\$220.95	\$183.25	\$175.00	\$215.00
60 th Percentile	\$225.00	\$193.00	\$175.00	\$220.00
65 th Percentile	\$230.00	\$199.75	\$176.50	\$224.60
70 th Percentile	\$235.00	\$200.00	\$182.00	\$225.20
75 th Percentile	\$240.00	\$200.00	\$187.50	\$234.00

Table 10. Full-Time Young Preschooler Care Weekly Rates by Program Type

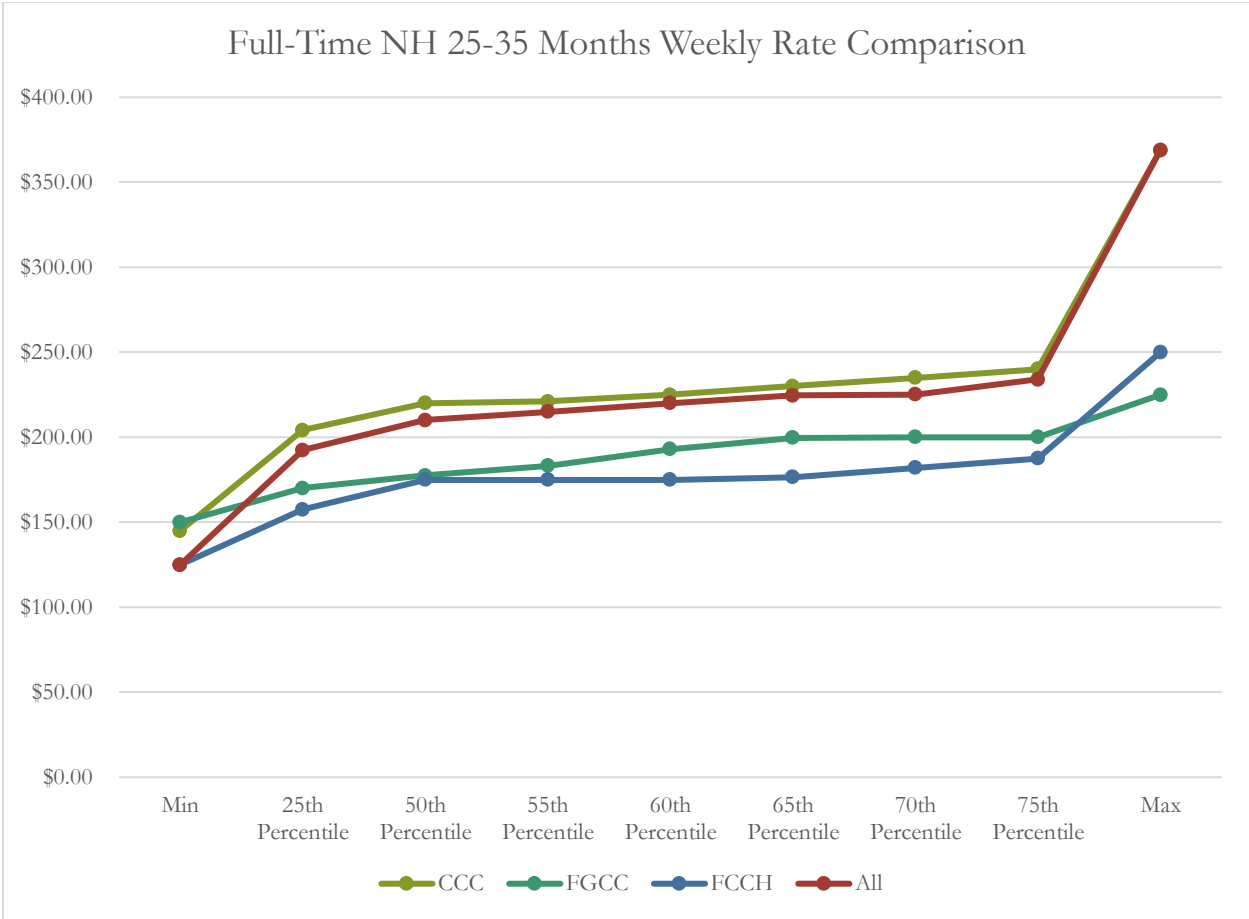


Chart 4. Full-Time Young Preschooler Weekly Rate Comparisons by Program Type

Daily Rates

A few full-time programs (11.8%) charged a daily rate, a slight increase from 10.9% in 2016. The mean daily rate for children 25-35 months was \$37.69, very close to \$38.18 in 2016, and the median daily rate for children 25-35 months was \$37.00, a \$1.00 decrease in the last two years.

Full-time 25-35 months Preschool Aged Care Daily	Amount
Mean	\$37.69
Median	\$37.00
Std. Deviation	7.05
50 th Percentile	\$37.00
55 th Percentile	\$37.15
60 th Percentile	\$38.80
75 th Percentile	\$40.75

Table 11. Full-Time Young Preschooler Care Daily Rates

Preschool Aged Care (36-59 months)

Weekly Rates

The majority of programs (75.2%) charged for full-time preschool care by the week, a slight decrease from 2016 (76.9%). There were 252 programs providing full time care for preschool children in March 2018 that charged by the week. Among those, 178 were Child Care Center programs, 31 Family Group Child Care programs, and 29 Family Child Care Home programs. The full-time weekly rate for preschool children ranged from \$120 to \$335. The full-time weekly rate for preschoolers averaged (mean) \$197, which increased 4.7%, from \$188.12 in 2016. The median full-time weekly rate for preschoolers was \$191, which increased 4.4%, from \$183 in 2016.

Full-time 36-59 months weekly	Amount
Mean	\$197.00
Median	\$191.00
Std. Deviation	31.90
50 th Percentile	\$191.00
55 th Percentile	\$195.00
60 th Percentile	\$200.00
75 th Percentile	\$212.00

Table 12. Full-Time Preschooler Care Weekly Rates

Child Care Centers charged for preschool care at consistently higher rates than either Family Group Child Care or Family Child Care Home programs. The mean weekly preschool care at Child Care Centers was the highest (\$204.73), followed by Family Child Care Home programs (\$174.57) and Family Group Child Care programs (\$174.19). Similarly, the median weekly rate at Child Care Centers was the highest (\$196.50), followed by Family Group Child Care (\$175) and Family Child Care Homes (\$175.00).

Preschool Aged Care Weekly	CCC	FGCC	FCCH	All
N	178	31	29	252
Min	\$120.00	\$140.00	\$150.00	\$120.00
Max	\$335.00	\$225.00	\$225.00	\$335.00
Mean	\$204.73	\$174.19	\$174.57	\$197.00
Std. Deviation	32.25	21.8	18.71	31.9
50 th Percentile	\$196.50	\$175.00	\$175.00	\$191.00
55 th Percentile	\$204.35	\$175.00	\$175.00	\$195.00
60 th Percentile	\$207.60	\$175.00	\$175.00	\$200.00
65 th Percentile	\$210.00	\$175.00	\$175.00	\$204.15
70 th Percentile	\$215.00	\$180.00	\$178.00	\$207.85
75 th Percentile	\$220.00	\$185.00	\$180.00	\$212.00

Table 13. Full-Time Preschooler Care Weekly Rates by Program Type

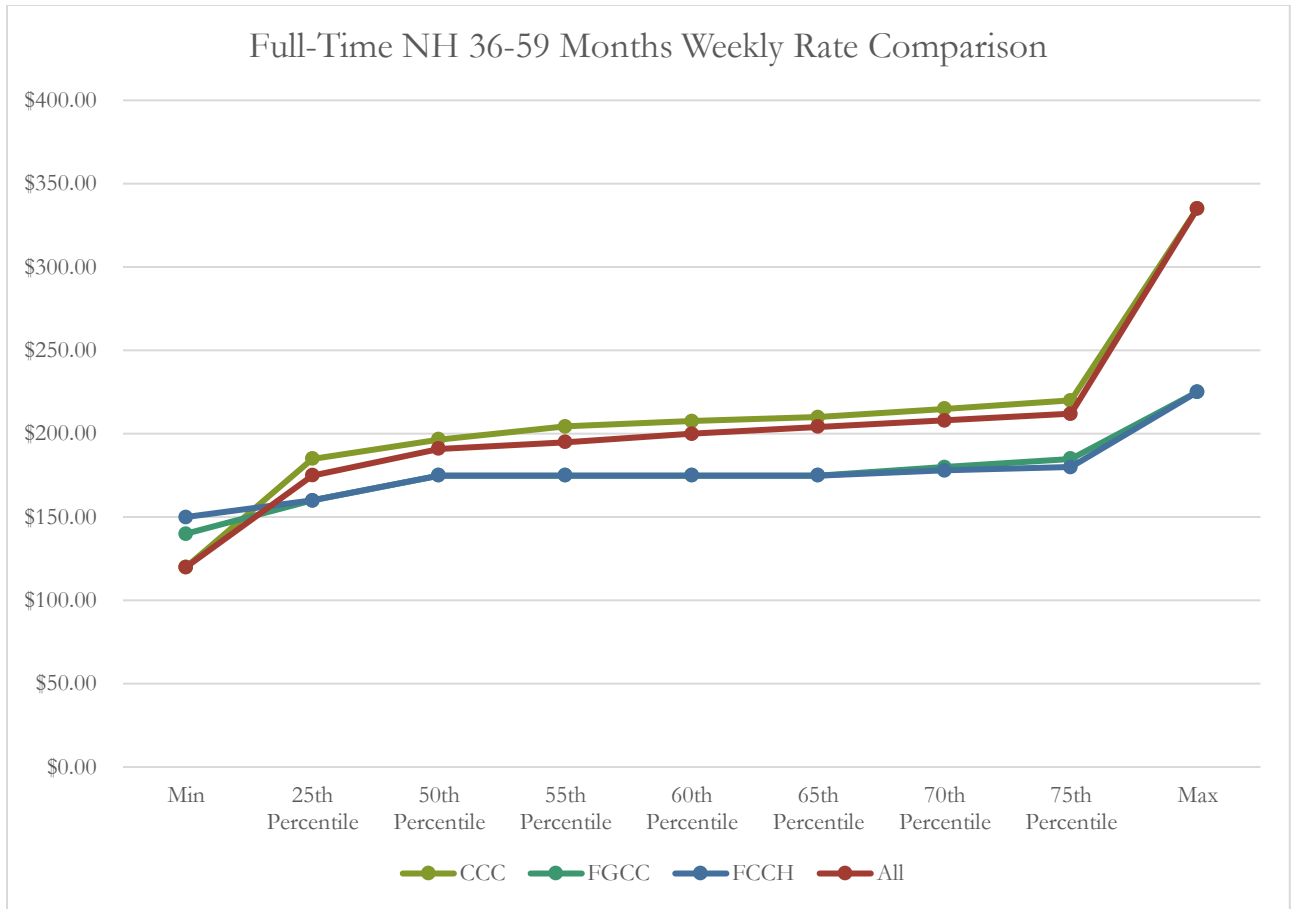


Chart 5. Full-Time Preschooler Weekly Rate Comparisons by Program Type

Daily Rates

A few full-time preschool programs (11.%) charged daily rate, which has not changed much from 11.6% in 2016. The mean daily rate for preschool children was \$38.71, a \$2.78 (7.7%) increase from \$35.93 in 2016. The median daily rate for preschool children was \$37.00, a \$2.00 (5.7%) increase from \$35.00 in 2016.

Preschool Aged Care Daily	Amount
Mean	\$38.71
Median	\$37.00
Std. Deviation	8.37
50 th Percentile	\$37.00
55 th Percentile	\$37.45
60 th Percentile	\$39.20
75 th Percentile	\$45.00

Table 14. Full-Time Young Preschooler Care Daily Rates

Care for Children Between Five and Six Years

Weekly Rates

The majority of such programs (77.8%) charged for full-time care by the week, an increase from 2016 (75.9%). There were 165 programs that provided full time care for five to six-year-old children in 2018 with weekly rates. Among those, 122 were Child Care Center programs, 20 Family Group Child Care programs, and 15 Family Child Care Home programs.

The full-time weekly rate for children between five and six ranged from \$50 to \$274. The full-time weekly rate for children between five and six averaged (mean) \$180.33, which has not changed much from \$179.03 in 2016. The median full-time weekly rate for children between five and six was \$185, which has increased 5.1% from \$176 in 2016.

Full-Time Age 5-6 Weekly	Amount
Mean	\$180.33
Median	\$185.00
Std. Deviation	41.75
50 th Percentile	\$185.00
55 th Percentile	\$185.00
60 th Percentile	\$190.00
75 th Percentile	\$200.00

Table 15. Full-Time School Age Care Weekly Rates

Child Care Centers charged for age 5-6 care at consistently higher rates than either Family Group Child Care or Family Child Care Home programs. The mean weekly rate at Child Care Centers was the highest (\$188.03), followed by Family Child Care Home programs (\$163.17) and Family Group Child Care programs (\$160.00). Similarly, the median weekly rate at Child Care Centers was the highest (\$190.00), followed by Family Child Care Homes (\$175.00) and Family Group Child Care (\$170).

Full-Time Age 5-6 Weekly	CCC	FGCC	FCCH	All
N	121	20	15	164
Min	\$70.00	\$60.00	\$50.00	\$50.00
Max	\$274.00	\$200.00	\$200.00	\$274.00
Mean	\$188.03	\$160.00	\$163.17	\$180.33
Std. Deviation	39.95	35.32	35.03	41.75
50 th Percentile	\$190.00	\$170.00	\$175.00	\$185.00
55 th Percentile	\$190.00	\$172.25	\$175.00	\$185.00
60 th Percentile	\$192.00	\$175.00	\$175.00	\$190.00
65 th Percentile	\$195.00	\$175.00	\$175.00	\$190.00
70 th Percentile	\$205.00	\$176.50	\$175.00	\$195.00
75 th Percentile	\$210.00	\$180.00	\$175.00	\$200.00

Table 15. Full-Time School Age Care Weekly Rates by Program Type

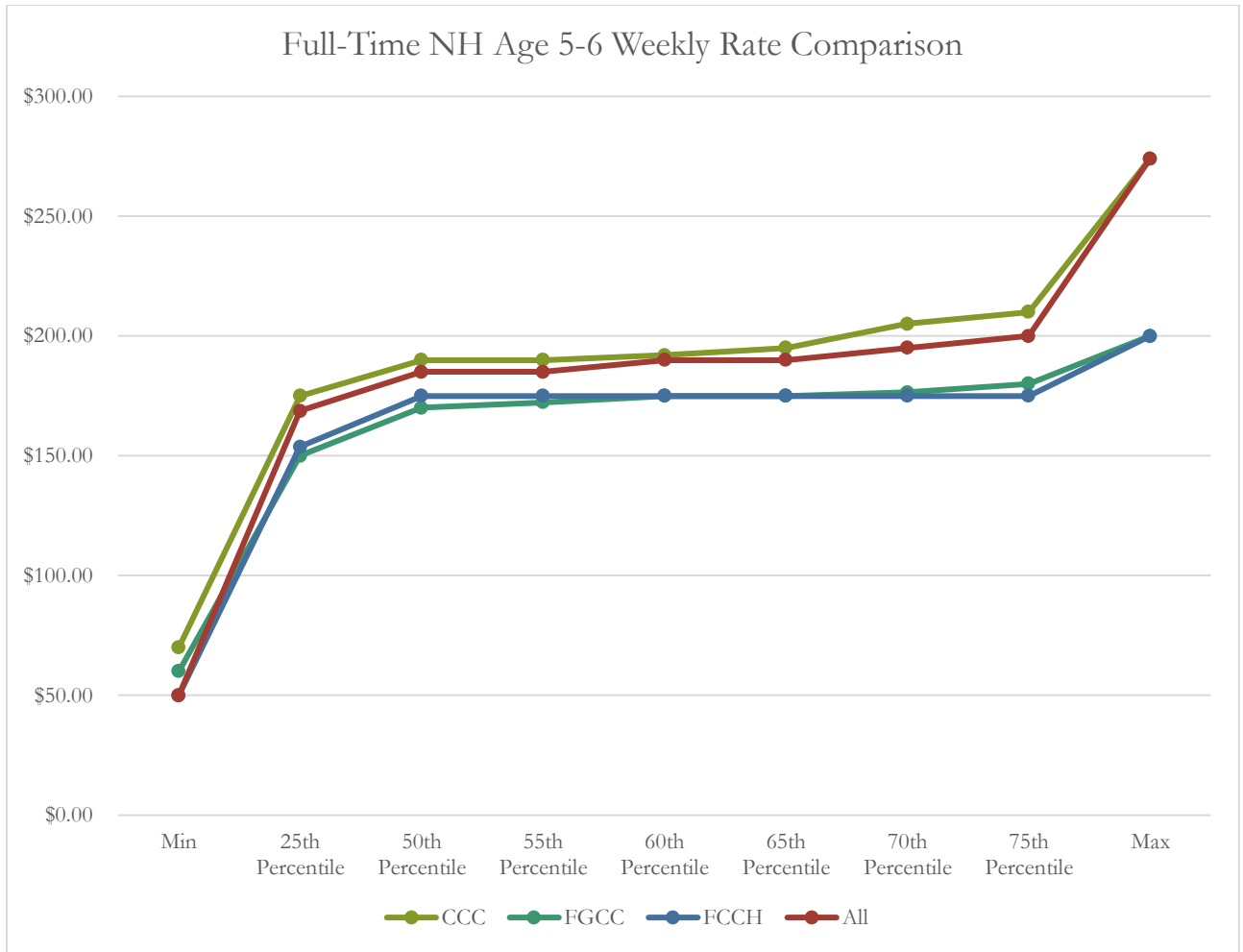


Chart 6. Full-Time School Age Weekly Rate Comparisons by Program Type

Daily Rates

A few full-time ages 5-6 programs (9.4%) charged a daily rate, a 2.2% decrease from 11.6% in 2016. The mean daily rate for age 5-6 was \$36.93, a \$1.00 (2.8%) increase from \$35.93 in 2016, while the median daily rate for age 5-6 was \$38.00, a \$3 (8.6%) increase from \$35.00 in the last two years.

Full-Time Age 5-6 Daily	Amount
Mean	\$36.93
Median	\$38.00
Std. Deviation	9.18
50 th Percentile	\$38.00
55 th Percentile	\$39.23
60 th Percentile	\$39.70
75 th Percentile	\$45.00

Table 16. Full-Time School Age Care Daily Rates

NH Part-Time Child Care Rates

Frequent Rate Charge Type

Daily and weekly rates were by far the most common way of charging for part-time care and utilized by three quarters of providers combined (75%). Other types of charge frequencies were monthly (17.3%), hourly (5.1%), yearly (2%), quarterly (0.28%) and bi-weekly (0.3%) .

Rate Type	Number of Programs	Percentage
Daily	152	43.18%
Weekly	112	31.18%
Monthly	61	17.33%
Hourly	18	5.11%
Yearly	7	1.99%
Bi-weekly	1	0.28%
Quarterly	1	0.28%

Table 17. Part-Time Rate Frequencies

Part-Time Rates

Across all age groups, the most common part-time rates charged were by the day: 53.3% for infant, 50% for toddler, 52.6% for young preschoolers, 44.2% for preschoolers, and 40% for 60-72 months' care.

The mean daily rate for infant care (0-12 months) was \$58.26, a \$6.26 increase from \$52.10 in February of 2016, while the median was \$58.00, a \$6 increase from \$52.00 from 2016.

The mean daily rate for toddler care (13-24 months) was \$53.69, up from \$48.25 in 2016, while the median was \$55.00, up from \$50 in 2016.

The mean daily rate for young preschoolers (25-35 months) was \$48.74, up from \$42.98, while the median was \$48, from \$45 in 2016.

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The mean daily rate for preschoolers (36-59 months) was \$43.84, from \$40.38 in 2016, while the median was \$45, compared to \$44 from 2016.

The mean daily rate for 60-72 months was \$34.63, almost unchanged from \$33.84 in 2016, while the median rate was \$32, a \$3 decrease from 2016.

Part-Time Daily	0-12 M	13-24 M	25-35 M	36-59 M	60-72 M
Min	\$30.00	\$26.00	\$18.00	\$10.00	\$9.00
Max	\$97.50	\$80.00	\$77.50	\$71.00	\$65.00
Mean	\$58.26	\$53.69	\$48.74	\$43.84	\$34.63
Std. Deviation	12.36	11.12	11.43	11.63	13.17
50 th Percentile	\$58.00	\$55.00	\$48.00	\$45.00	\$32.00
55 th Percentile	\$60.00	\$57.35	\$50.00	\$45.00	\$35.00
60 th Percentile	\$60.00	\$59.10	\$50.00	\$47.00	\$37.00
75 th Percentile	\$65.00	\$60.00	\$55.06	\$50.00	\$43.75

Table 18. Part-Time Rates by Age of Child

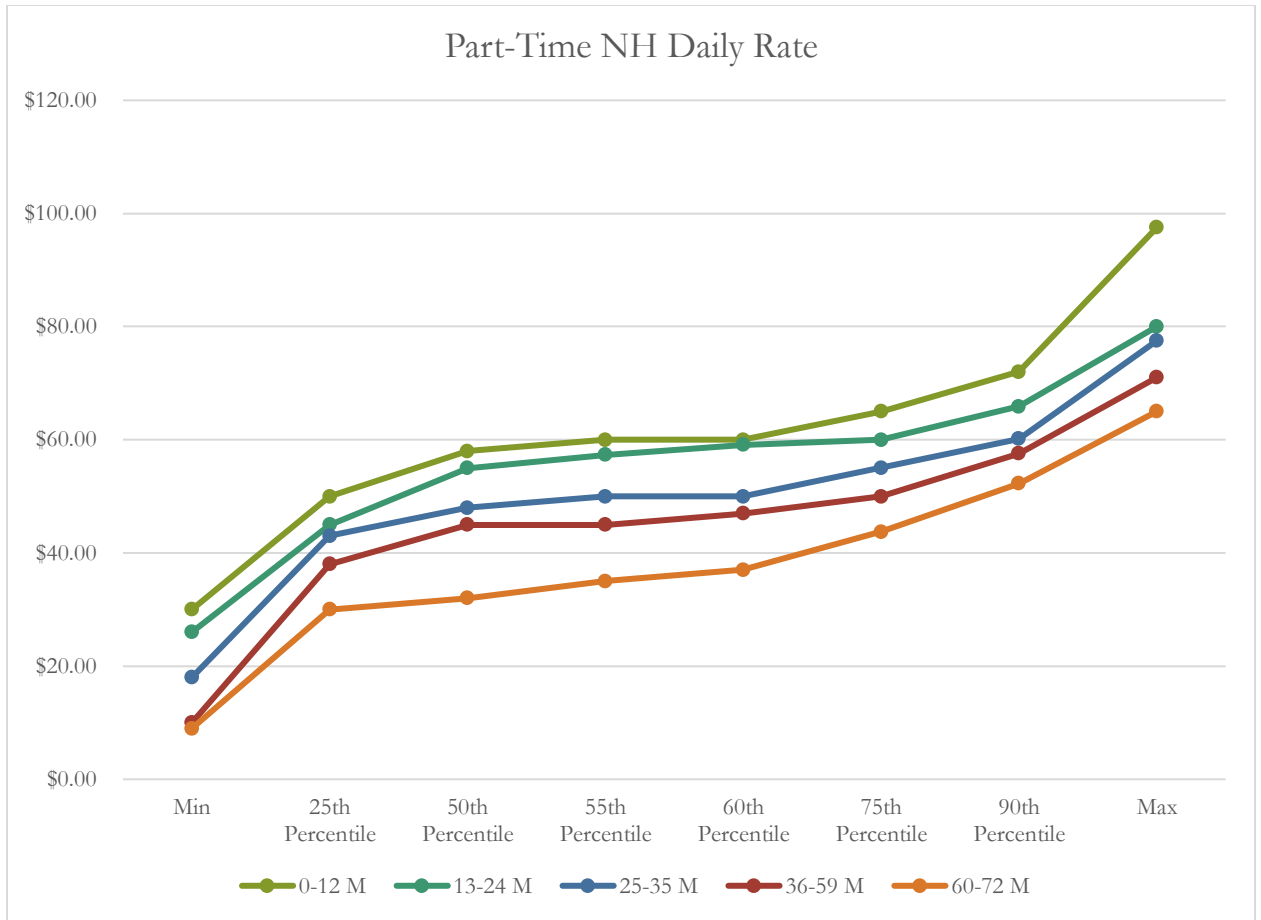


Chart 6. Part-Time Daily Rate Comparisons by Program Type

School Age Rates

For school age care, we asked about before and after school, before school only, and after school only care. Among those, a weekly rate was the most frequent rate type charged.

Before & After School Weekly Rates	All	School Age Only
N	108	36
Min	\$50.00	\$50.00
Max	\$207.50	\$120.00
Mean	\$93.84	\$99.33
Median	\$85.00	\$105.00
Std. Deviation	29.41	21.93
50 th Percentile	\$85.00	\$105.00
55 th Percentile	\$87.00	\$120.00
60 th Percentile	\$90.40	\$120.00
75 th Percentile	\$120.00	\$120.00

Table 19. Before & After School Care Weekly Rates

There were 108 (69.2%) programs offering before and after school care charged by the week and 25 (16%) by the day. The average weekly rate was \$93.84 and the median weekly rate was \$85.00.

In addition, 66 (68%) programs offered before school care only by the week and 18 (18.6%) by the day. The average weekly rate was \$54.55 while the median weekly rate was \$50.00.

Before School Only Weekly	All
N	66
Min	\$10.00
Max	\$185.00
Mean	\$54.55
Median	\$50.00
Std. Deviation	23.62
50 th Percentile	\$50.00
55 th Percentile	\$54.25
60 th Percentile	\$65.00
75 th Percentile	\$65.00

Table 19. Before School Care Weekly Rates

In regard to programs that offered only an after school program, 82 (58.2%) charged by the week and 34 (24.1%) by the day. The average weekly rate was \$71.59 while the median weekly rate was \$75.00.

After School Only Weekly	All
N	82
Min	\$25.00
Max	\$142.00
Mean	\$71.59
Median	\$75.00
Std. Deviation	17.49
50 th Percentile	\$75.00
55 th Percentile	\$75.00
60 th Percentile	\$80.00
75 th Percentile	\$85.00

Table 20. After School Care Weekly Rates

Additional Questions

In each Market Rate (MR) Survey project, various interested parties propose ideas and/or questions to be added to the end of the financial sections. This year, in addition to information gathered from survey responses, the Contractor met with the New Hampshire Child Care Aware leadership on June 24, and also with the Greater Manchester Leadership Collaborative on June 6 in order to conduct small focus groups to better understand provider concerns regarding cost share and co-pay, issues impacting enrollment, staff turnover, and program quality. We will identify specific survey questions in italics, then provider responses, and add brief narrative comments where appropriate.

Cost Share and Co-Pay

Question #33: If you charge cost share and/or copay, what would be the impact on your program if you no longer charged such payments? For example, would there be an impact on staffing, on the number of children being served, or on other things? Please briefly explain.

Top responses based on string match⁵ were staffing, revenue/income, and children. See the table below for detailed string occurrence counts. The response rate was 57.9% (N=292). A previous MR survey (MR7) found increases in cost share had negative enrollment impacts.

Keyword	Occurrences count
Staffing/Staff	50/22
Revenue/Income/Pay/budget/Financial	20/18/15/10/7
Children	37
Scholarship	10
Supplies	6
Tuition	6

Table 21. Cost Share/Copay Elimination Impacts

⁴ *String match* means, in general terms, a search for the number of occurrences of a keyword in all replies.

Question #34: If you charge cost share and/or copay, do you charge families at all step levels? Yes No

If your answer was NO, at which step levels do you collect these payments? (check all that apply) 1 2 3 4 5 6 7

Nearly all (484 or 96%) programs responded to questions #33 and #34. Among those responding, 290 (59.9%) programs replied *Yes* while 194 (40.1%) *No*. Among those that answered *No*, a very small percentage of programs (<3%) collected payments at specific levels. Please refer to the table below for percentages that answered *yes* at each step level.

Step Level Collected payment	Yes (N)	Yes (Percentage)
1	4	1.38%
2	6	2.07%
3	5	1.72%
4	8	2.76%
5	7	2.41%
6	7	2.41%
7	7	2.41%

Table 22. Step Level Collections

Enrollment

Question #35: Was your program able to be **fully enrolled** during 2017? Yes No

If **YES**, do you have a Wait List? Yes No

If **NO**, what was the primary reason (please select only one of the following)

- Lack of families/not enough children enrolled
- Competition/area saturated with other providers
- Inability to find enough staff to fill all vacant positions
- Inability to maintain staffing/keep staff
- Other (please explain)

Two of every five programs (178 or 40.4%) were not able to be fully enrolled during 2017, while 263 (59.6%) programs were able to be fully enrolled. 441 responded to that question. Among those that were able to be fully enrolled, 209 (79.5%) did have a Wait List. Among those that were not able to have full enrollment, 50% of them stated a *lack of families/not enough children enrolled* as the primary reason, followed by *inability to find enough staff to fill all vacant positions*, and *other* (17.2%) that included primarily individualized responses.

Primary reason for not having a full enrollment	N	Percentage
Lack of families/not enough children enrolled	87	50.00%
Inability to find enough staff to fill all vacant positions	34	19.54%
Other	30	17.24%
Competition/area saturated with other providers	19	10.92%
Inability to maintain staffing/keep staff	4	2.30%

Table 23. Issues Limiting Full Enrollment

Staff Turnover

A 1989 study by the Child Care Employee Project found that turnover at child care centers rose from 15 percent a year in 1977 to 41 percent in 1988 – tripling in just a decade. During that same period, the number of child care centers reporting no turnover among their educators fell from 40 percent to 7 percent (Hopkins, J., 2013)

Nationally, the annual rate of staff turnover in child care has been estimated at 30% (NAEYC, 2004)(Porter, 2012), and by NACRA (2012) as between 25% and 40%. Over the last 20 years New Hampshire has had a smaller staff turnover rate compared to the national average.

*Question 36: Please indicate **number of staff** positions in your program and also **staff turnover** during 2017.*

A	B	C	D	E
Position	# of Full-time Staff	# of Full-time staff that left in 2017 (can be more than Column B)	# of Part-time Staff	# of Part-time staff that left in 2017 (can be more than Column D)
Director				
Teacher				
Support Staff				
TOTAL				

• DIRECTOR

The number of full-time Directors per program that left in 2017 ranged from 0 to 6, with a mean of 0.20 and median of 0. The turnover rate, as defined by the number of Directors that left during 2017 per program ranged from 0 to 6, with mean of 0.15 and median of 0.

The number of part-time Directors that left in 2017 ranged from 0 to 2, with mean of 0.24 and median of 0. The turnover rate, as defined by the number of directors that left during 2017 per program ranged from 0 to 1, with average of 0.16 and median of 0.

Based on the results of this survey, turnover among Directors is quite low.

- **TEACHERS**

The number of full-time Teachers per program that left in 2017 ranged from 0 to 18, with mean of 2.16 and median of 1. The turnover rate, as defined by the number of Teachers that left during 2017 per program ranged from 0 to 6, with a mean of 0.35 and median of 0.23.

- The number of part-time Teachers per program that left in 2017 ranged from 0 to 12, with mean of 1.36 and median of 1. The turnover rate, as defined by the number of Teachers that left during 2017 per program ranged from 0 to 4, with an average of 0.36 and a median of 0.13.

- **SUPPORT STAFF**

The number of full-time Support staff members per program that left in 2017 ranged from 0 to 9, with mean of 1.25 and median of 1. The turnover rate, as defined by the number of Support staff that left during 2017 per program ranged from 0 to 4.5, with a mean of 0.50 and median of 0.25.

The number of part-time Support staff members per program ranged from 0 to 11, with a mean of 1.53 and median of 1. The turnover rate, as defined by the number of Support staff members that left during 2017 per program ranged from 0 to 3, with an average of 0.50 and a median of 0.33.

- ALL STAFF

The total number of full-time staff members per program that left in 2017 ranged from 0 to 18, with mean of 1.74 and median of 1. The turnover rate, as defined by the total number of staff members per program that left in 2017 ranged from 0 to 2, with a mean of 0.24 and a median of 0.14.

The total number of part-time Staff members per program that left in 2017 ranged from 0 to 13, with mean of 1.35 and median of 0. The turnover rate, as defined by the total number of staff members per program that left in 2017 ranged from 0 to 3, with an average of 0.44 and a median of 0.25.

In focus groups, the biggest frustration appeared to be the risk of a Director mentoring a new employee, and reimbursing training costs, only to have that employee then move to a different provider, particularly a more corporate program with benefits. Effectively full employment in NH means staff turnover is projected to increase in the near term. This year's survey results can serve as a baseline for potential future turnover trends.

Program Quality

Responses to Questions 37-39 were all over the map, with the most frequent response by far some version of "Unknown", "Do Not Know", "DK", "Unsure", or "?". A few providers estimated training for health and safety might cost as much as \$10,000.00 to \$16,000.00. The highest annual costs for Questions 38-39 were from less than a handful of outliers indicating their costs would be \$12,000.00 to \$60,000, with one noting they might have to hire additional staff to "manage the accreditation process".

Question #37: What do you estimate the annual cost to your program fully implement the new health and safety, plus first aid and CPR requirements?

The response rate was 66.3% (N=334), and the range is from \$0.00 to \$16,000.00. The mean was \$1102.38 and median was \$500.00.

Some providers acknowledged that the 11 online health and safety topics may not incur a registration cost, as they are offered free of charge at this time by the DHHS, Bureau of Child Development and Head Start Collaboration. However, providers in the two focus groups expressed significant general concerns regarding costs. A new child care employee may feel overwhelmed and need to lay out over \$100 to begin work, including perhaps \$50 for a fingerprint card, plus more for CPR/First Aid, plus perhaps \$7 to print off a certificate, etc. Some programs may offer reimbursement after a year, and some may offer First Aid/CPR onsite without cost. In addition, the amount of related paperwork for directors has become a burden. A few programs effectively offer paid time off for the coursework if staff do the work “on the clock”.

- *Question #38: If you are currently Licensed Plus, what would be the annual cost to your program to become or maintain the Licensed Plus Quality designation?*

The response rate was 14.1% (N=71), and the range was from \$0.00 to \$ 60,000.00. the mean was \$2,312.67 and median was \$500.00. For some providers this designation was important, both as an indicator of quality, and a way to stand out from other programs. However, only 1 in every 7 providers responded to this question.

- *Question #39: If you are currently nationally accredited, what would be the annual cost to your program to become or maintain the national accreditation designation?*

There was a small response rate of 7.5% (N=38) to this question. . Just half of those responding to Question #38 answered this question. The range was quite broad, from \$0.00 to \$ 20,000.00. The mean was \$2,149.34 and the median \$1,500.00.

Several directors questioned the value of national accreditation, noting the high costs, tremendous time, and perceived small payoff for this quality level

Two recommendations emerged from the focus groups in regard to other issues:

a. There needs to be a procedure to eliminate duplication for elementary teachers moving to child care who need to redo fingerprint checks even if they had done for an elementary education position a month earlier. Such duplication is costly for child care teacher applicants but also cumbersome for the state.

b. There needs to be a process to educate providers on how to calculate the costs associated with purchasing, tracking use and expiration dates of consumables, maintaining emergency materials and preparation activities, maintaining required fire and smoke alarms, and fire department inspections.

NH Full-Time Rate Comparison by CCR&R Regions

Another approach to understanding market rates in child care is to consider variations across discrete geographic regions. For example, one might expect to see urban-rural differences, or north-south differences. The following sections compare the most common rate type (weekly) for full-time care across regions.

Full-Time Weekly Average	6wks-12 months	13-24 months	25-35 months	36-59 months	60-71 months
Central	\$209.14	\$199.51	\$196.90	\$187.13	\$167.21
Eastern	\$248.47	\$240.83	\$226.26	\$207.00	\$187.58
Northern	\$199.00	\$193.56	\$186.63	\$165.00	\$161.00
Southern	\$251.35	\$232.51	\$226.47	\$205.15	\$188.08
Southwestern	\$215.40	\$198.45	\$202.46	\$178.26	\$169.03

Table 24. Full-Time Preschool Weekly Average Rates by Region

Full-Time Weekly Median	6wks-12 months	13-24 months	25-35 months	36-59 months	60-71 months
Central	\$215.00	\$205.00	\$200.00	\$185.00	\$177.00
Eastern	\$250.00	\$230.50	\$225.00	\$202.00	\$194.00
Northern	\$205.00	\$190.00	\$182.50	\$170.00	\$180.00
Southern	\$240.00	\$225.00	\$220.00	\$200.00	\$185.00
Southwestern	\$210.00	\$190.00	\$200.00	\$179.00	\$177.50

Table 25. Full-Time Preschool Weekly Median Rates by Region

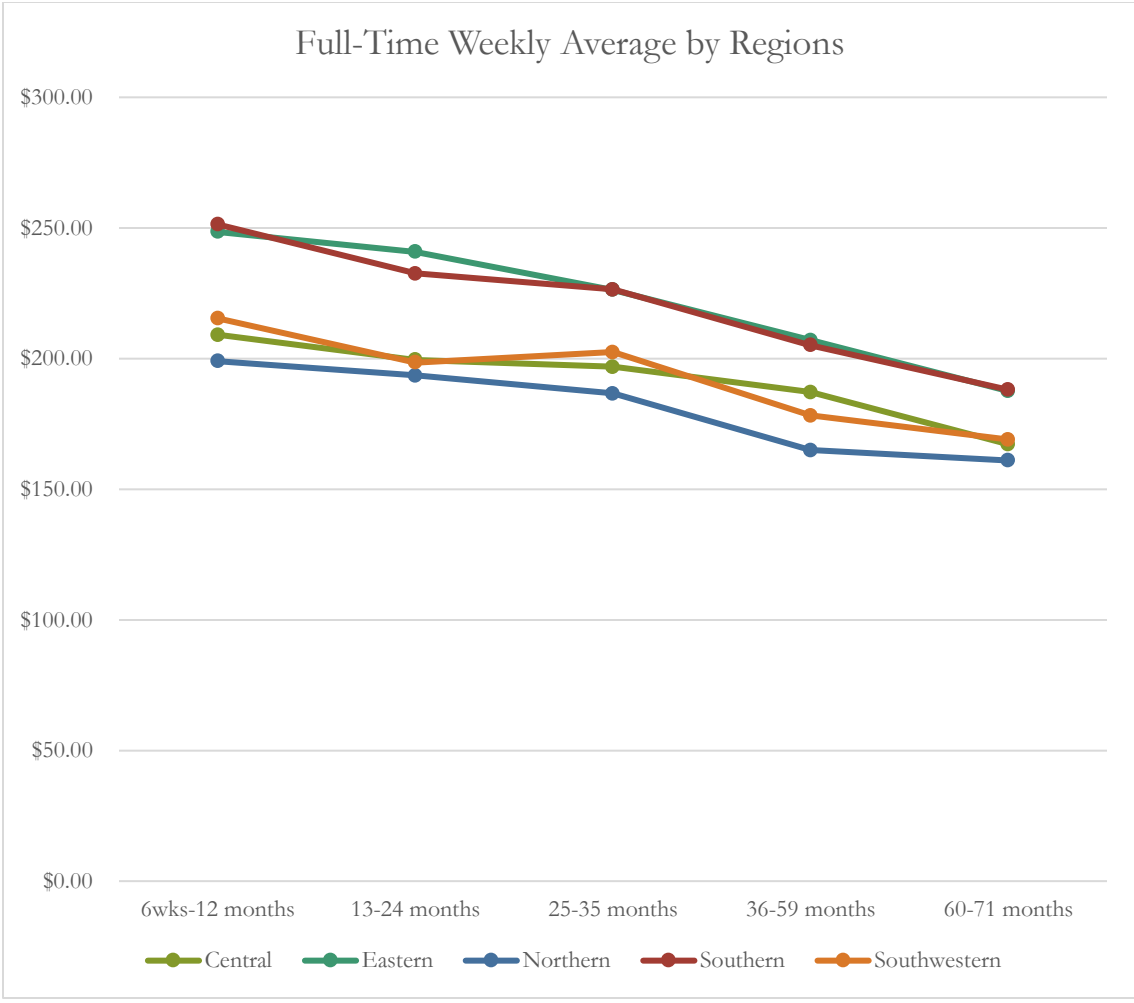


Chart 7. Full-Time Weekly Rate Comparisons by Region

Infant Care (6 weeks to 12 months)

The NH infant care full-time weekly rate averaged \$237.47 and its median rate was \$232.50. Average and median rates in the Eastern and Southern regions were at or above those rates, and the remaining three regions were below. Among all five regions, the highest mean was in the Southern region and the highest median was in the Eastern region while the lowest mean and median were both in the Northern region.

The rate difference was significant: The highest mean was \$52.35 (26.3%) higher and the median was \$45.00 (21.95%) higher than those of the lowest. The program count difference was significant as well: The Southern region contains almost sixteen times as many programs as those from the Northern region.

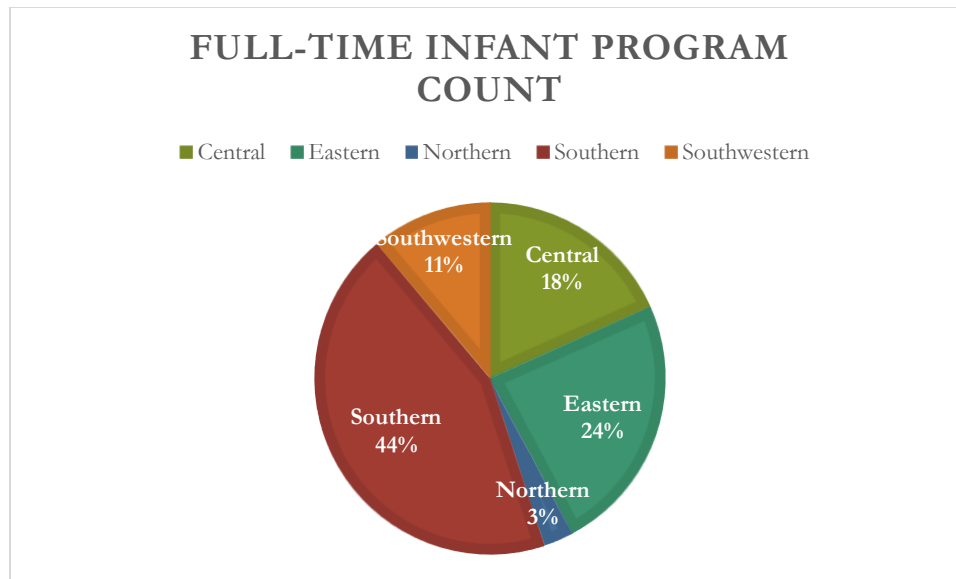


Chart 8. Full-Time Infant Program Percentages by Region

Full-Time Infant	Program Count
Central	33
Eastern	43
Northern	5
Southern	79
Southwestern	20

Table 26. Full-Time Infant Programs by Region

Toddler Care (13-24 months)

The NH toddler care full-time weekly rate averaged \$221.03 and its median rate was \$220.00. Average and median rates in the Eastern and Southern regions were at or above those rates, and the remaining three regions were below. Among all five regions, the highest mean and median were from the Eastern region, while the lowest were in the Northern and Southwestern regions. The lowest region’s mean weekly was \$47.27 (24.4%) lower than the Eastern region, while the lowest median rate was \$40.50 (21.3%) lower than the highest region. The Southern region contains more than ten times as many programs (91) as that of the Northern region.

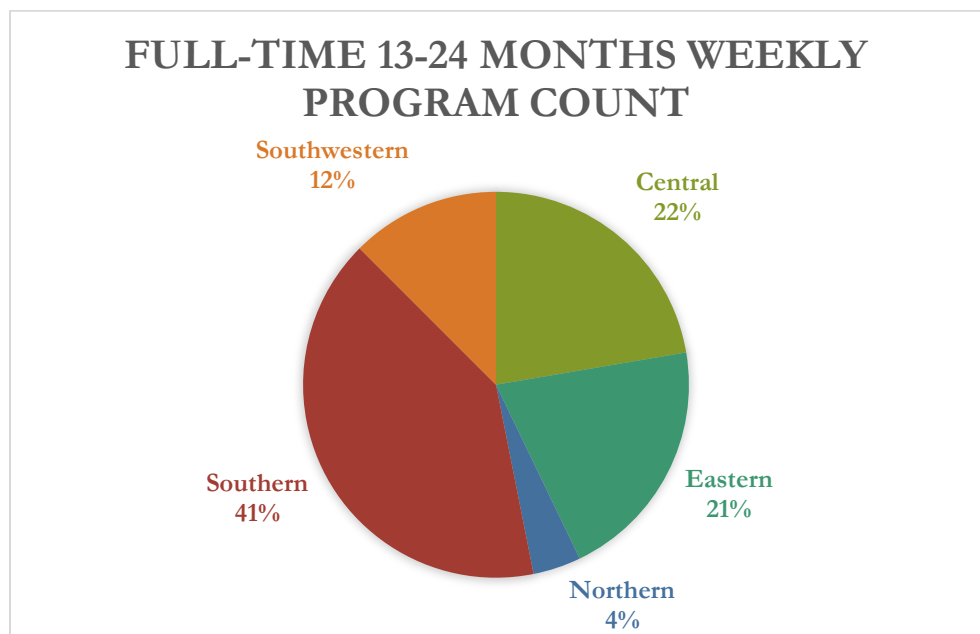


Chart 9. Full-Time Toddler Program Percentages by Region

Full-Time 13-24 Months	Program Count
Central	50
Eastern	46
Northern	9
Southern	91
Southwestern	28

Table 27. Full-Time Toddler Programs by Region

Young Preschool Age Care (25-35 months)

The NH care full-time weekly rate for young preschoolers averaged \$215.84 and its median rate was \$210.00. Average and median rates from Eastern and Southern regions were at or above those rates, and the remaining three regions were below. Among all five regions, the highest mean and median were in the Eastern and Southern regions while the lowest was in the Northern region. Compared to the region that charged the highest rates, the Northern region's mean weekly was \$39.84 (21.4%) and its median rate was \$43.00 (23.6%) lower. The Southern region contains more than eleven times as many programs (91) as that (8) of the Northern region.

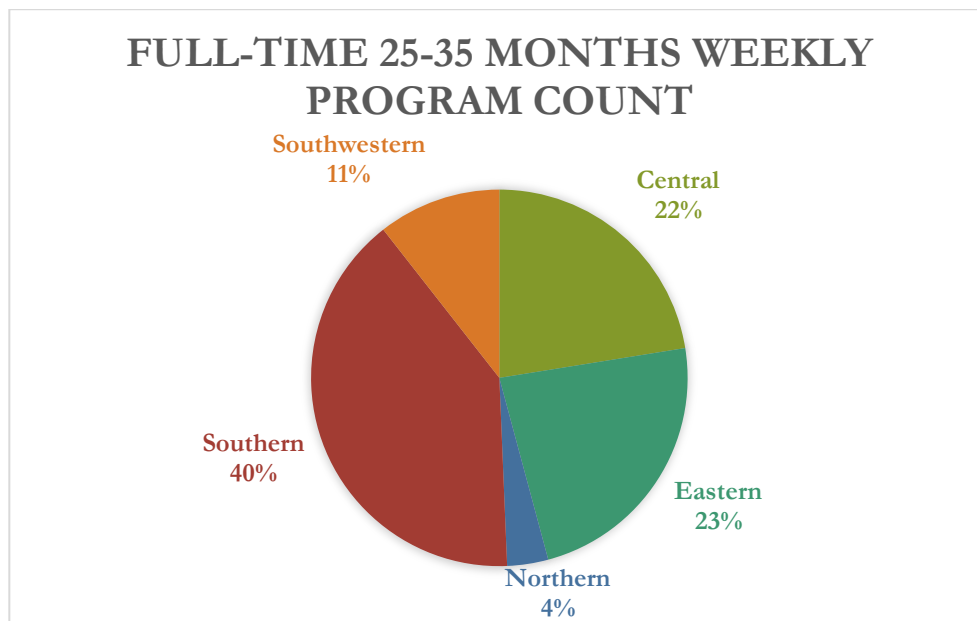


Chart 10. Full-Time Young Preschooler Program Percentages by Region

Full-Time 25-35 Months	Program Count
Central	51
Eastern	53
Northern	8
Southern	91
Southwestern	24

Table 268. Full-Time Young Preschooler Programs by Region

Preschool Aged Care (36-59 months)

The NH preschool age care full-time weekly rate averaged \$197.00 and its median rate was \$191.00. The Eastern and Southern regions' average and median rates were at or above those rates, and the remaining three regions were below. Among all five regions, the highest mean and median were in the Eastern region while the lowest was in the Northern region. Compared to the region that charged the highest rates, the Northern region's mean weekly was \$42.00 (25.5%) lower and median was \$32.00 (18.8%) lower. The Southern region contained more than ten times as many programs (95) as that of the Northern region (9).

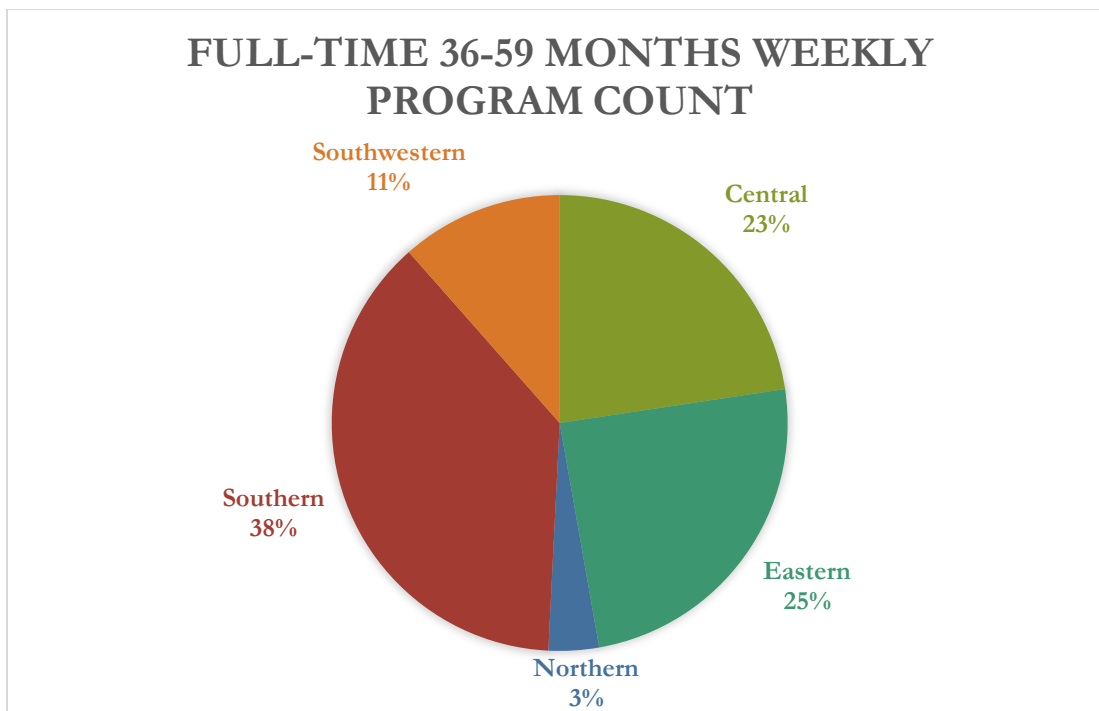


Chart 11. Full-Time Preschooler Program Percentages by Region

Full-Time 25-35 Months	Program Count
Central	57
Eastern	62
Northern	9
Southern	95
Southwestern	29

Table 29. Full-Time Infant Programs by Region

Care for Children Between Five and Six

The NH full-time weekly rates for programs serving children aged 5-6 years averaged \$180.33 and its median rate was \$185.00. Eastern and Southern regions’ average and median rates were at or above those rates, and the remaining three regions were below. Among all five regions, the highest mean was in Southern region and highest median in the Eastern, while the lowest mean in the Northern region and median the Central region.

Compared to the highest mean rate from the Southern region, the mean from the Northern region was \$27.08 lower. Compared to the highest median rate from the Eastern region, the median from the Central region was \$17.00 lower. The program count was the largest from the Southern region (71) and lowest (5) from the Northern region.

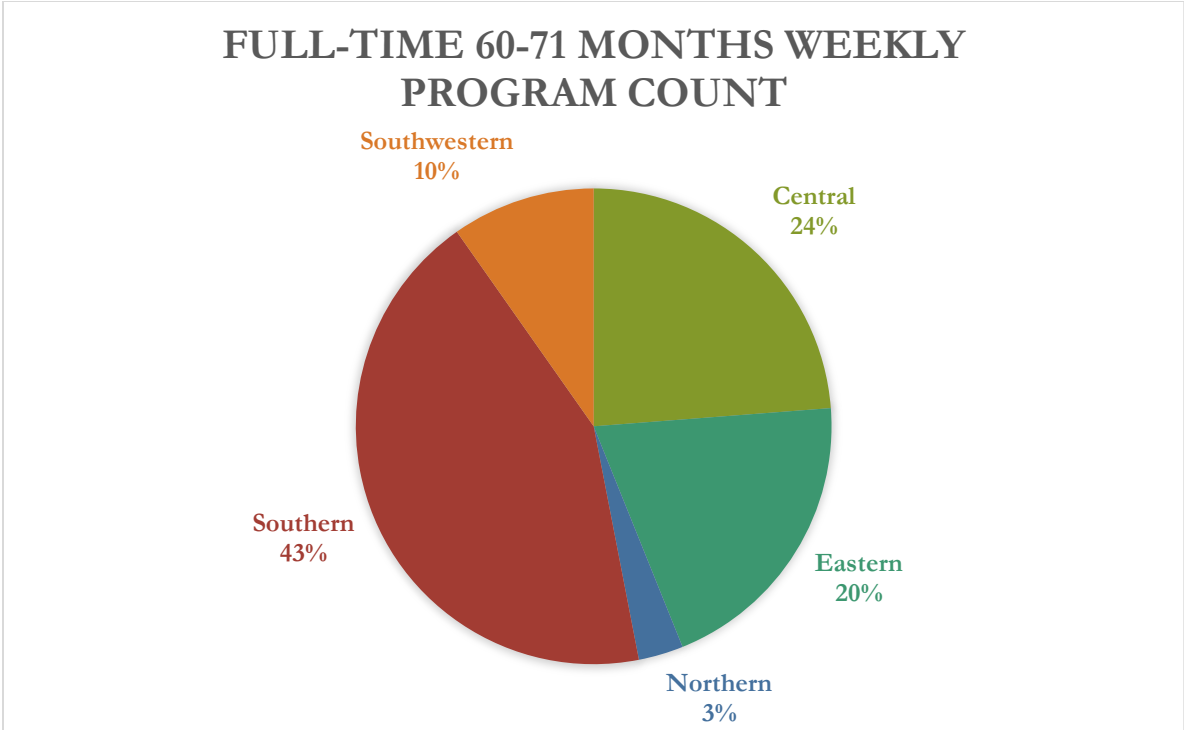


Chart 12. Full-Time School Age Program Percentages by Region

Full-Time 60-71 Months	Program Count
Central	39
Eastern	33
Northern	5
Southern	71
Southwestern	16

Table 30. Full-Time School Age Programs by Region

Trends & Issues in NH and its Early Childhood Programs

Population Changes

We believe there are three major reasons for concern about the future of child care and early education in our state. First, we are getting older. New Hampshire is the most rapidly aging state in the nation, older than Florida and Arizona, tied with Vermont with the second oldest population, and just a step behind Maine. “Over the next two decades our state’s 65-and-older population is expected to double” (Seacoast Online, 2018). The 10-year population change is only +1.5%, the fifth smallest increase among all states, and almost entirely fueled by a net domestic migration gain. Additionally, 60 percent of high school graduates now leave the state to attend college and very often don’t come back. Financial support for services may be leading away from the young and towards the old.

Second, the U.S. population under six is decreasing as part of the national “baby bust” with a record low fertility rate for the second consecutive year. A recent Morning Consult survey of a representative sample of 1858 men and women ages 20 to 45, found that the most significant reason (64%) that factored into their decisions not to have fewer children was not being able to afford child-care costs (Miller, 2018). Millennials face an unemployment rate 40 percent higher than the national average. “For those lucky enough to be employed, the average cost of center-based infant child care in the U.S. adjusted for inflation, exceeds 27 percent of millennial median income (Child Care Aware, 2017).

Third, we predict a continuing generational turnover as older providers retire, many of whom identified their role as a service to the community and accepted lower financial remuneration as a consequence. Their younger replacements may justifiably have a somewhat different world view regarding their long term careers.

Poverty and Access to Early Care and Education Programs

While the overall poverty rate in New Hampshire is 7.3%, about half the national rate, and low enough to rank us first among all states, pockets of high poverty continue to exist, especially along the Maine border and in the North Country, and poverty levels across the state are highest for children. Given our national ranking, sensitivity to and support for our poorer citizens may be a continuing challenge.

The child poverty rate here, according to the *Spotlight on Poverty and Opportunity* (n.d.) is 10.2%. The percent of children living in single parent families in our state is 31%, while 27% of single parent families with related children are below the poverty rate. A recent study by Rank and McLaughlin, published in *Social Work Research*, determined that childhood poverty cost the nation \$1.03 trillion in 2015, or 5.4% of GDP. They calculated that each dollar spent on reducing childhood poverty would save at least \$7 with respect to the economic costs of poverty.

Therefore, “investing in programs that reduce childhood poverty is both smart and efficient economic policy” (Rank, 2018). Other studies have demonstrated that facilitating access to high quality child care and early education programs proves that an ounce of [early] prevention is worth a pound of [later] cure. Quality child care is neither abundant nor inexpensive. According to a report from the Economic Policy Institute, annual infant care in 33 states now costs more than a year’s tuition at a public university. “For minimum-wage workers nationally, child care costs can easily eat up over half of their paychecks” (Bronson, 2018).

Poverty and Caregivers

According to Marcy Whitebrook, director of the Center for the Study of Child Care Employment at the University of California, Berkeley, about “two million caregivers look after 12 million children from newborns to 5-year-olds, and they are among the lowest-paid workers in the country, sometimes earning little more than minimum wage” (Cohen, 2016). “Teaching preschoolers is every bit as complicated and important as teaching any of the K-12 grades, if not more so... But we still treat preschool teachers as babysitters. We want them to ameliorate poverty even as they live in it themselves” (Interlandi, 2018).

Children in low-income and minority neighborhoods stand to gain (or lose) the most from whatever preschool system we ultimately establish. And the one-on-one exchanges between students and teachers – what developmental psychologists call “process quality” – may well be the key to success or failure. In other words, if preschool classrooms really are crackling with the kind of raw power that can change the course of a life, that power most likely resides in the ability of teachers like Kelly to connect with students But if teachers are crucial to high-quality preschool, they are also its most neglected component (Interlandi, 2018).

While support for early childhood teaching professionals is certainly a national issue, it has increasing implications for the New Hampshire workforce, and for families with young children.

Number of Licensed Programs

There has been a gradual but steady decline in the number of licensed programs over the past two decades. There are 30.90% fewer programs in 2018 than in November 2001. In effect,

the state has “lost” 373 programs during this period. Please refer to the table and its graph below for detailed information on the number of licensed programs over the past market rate survey years.

Year	Licensed Program Count
2001	1207
2003	1160
2005	1150
2007	1128
2009	1114
2011	1016
2014	936
2015	902
2018	834

Table 31. Licensed Programs By Year

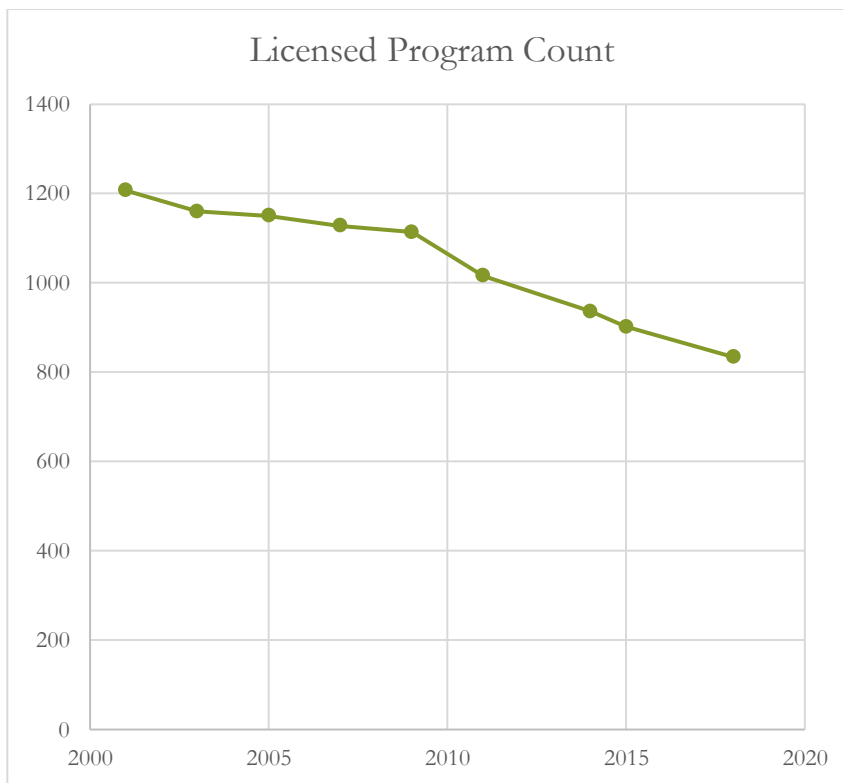


Chart 13. Licensed Program Counts by Year

Mean Licensed Capacity

Consistent with trends across the United States, mean licensed capacity has increased over the past decade, from 38.49 children in 2001 to 54.74 children in 2018. Please refer to the table and graph below for details. Thus, while the number of programs has fallen, overall licensed capacity has increased. It must be noted program size increases are not necessarily distributed in the same geographic areas as the closed programs.

Year	Mean Licensed Capacity
2001	38.49
2003	40.70
2005	42.00
2007	41.80
2009	45.14
2011	45.51
2014	49.86
2015	51.00
2018	54.74

Table 32. Mean Licensed Capacity by Year

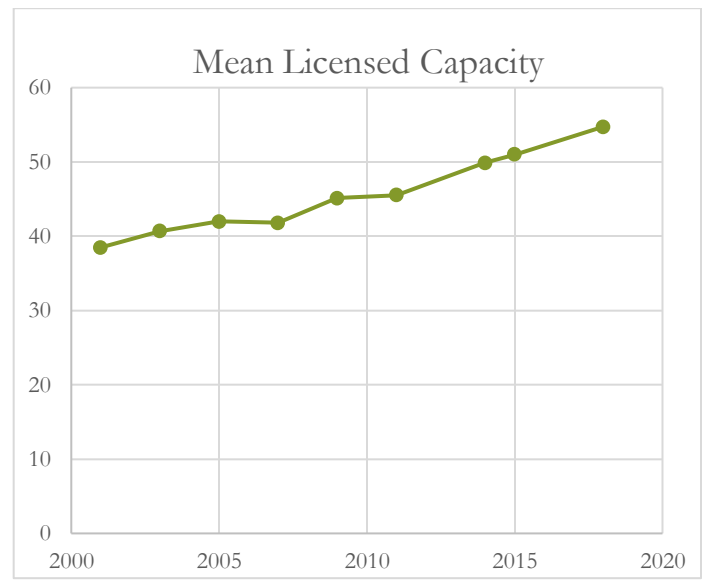


Chart 13. Mean Licensed Capacity by Year

Program Type Breakdown

Center based programs have consistently been the largest group of licensed programs in New Hampshire, increasing from early one-third (32%) of licensed programs in 2001 to over half (51.50%) of total programs in 2018.

Family home based programs have fallen from 21% in 2001 to 9.34% in 2018.

The percentage of Family Group programs hit a high of 15% in 2001, then were significantly reduced and had regained some of their losses to 13.23% in 2011. Their percentage dipped to 10.71% in 2014 and didn't change much (9.94%) in 2018.

The percentage of nursery school programs was 16% of the total in 2001, hovered at about 18% in the interim years, had fallen to 12.52% in 2011, and further to 9.52% in 2014. Their percentage bounced back to 11.15% in 2015 and dipped again to 8.55% in 2018.

Montessori programs have held consistent about two percent of the total over the years.

Head Start programs have varied from 4-6%; they represented 5.46% of 2014 returns and 5.72% of 2015 returns. Their percentage has increased to 8.62% in 2018.

Full-Time Rate Trends

Infant Care (6 weeks to 12 months) Weekly Rate

NH infant care rates have risen consistently over the past nearly two decades. The median (50th percentile) for infant full-time care has increased 72.22%, from \$135.00 in November 2001 to \$232.50 in 2018. The mean (average) for infant full-time care has increased 68.69%, from \$140.77 in November 2001 to \$237.47 in 2018.

NH Infant	2001	2003	2005	2007	2009	2011	2014	2015	2018
Min	\$50.00	\$42.50	\$50.00	\$75.00	\$75.00	\$75.00	\$80.00	\$107.00	\$125.00
25 th	\$120.00	\$130.00	\$149.50	\$150.25	\$165.00	\$180.00	\$185.00	\$195.00	\$205.00
50 th	\$135.00	\$155.00	\$170.00	\$180.00	\$192.00	\$200.00	\$206.00	\$220.00	\$232.50
75 th	\$160.00	\$180.00	\$192.00	\$205.00	\$220.00	\$225.00	\$240.00	\$255.00	\$265.00
90 th	\$185.00	\$217.20	\$226.50	\$236.25	\$250.00	\$260.00	\$269.00	\$297.00	\$295.00
Max	\$317.00	\$313.60	\$325.00	\$309.00	\$414.50	\$432.00	\$349.00	\$380.00	\$394.00

Table 33. Full-Time Infant Weekly Rates by Year

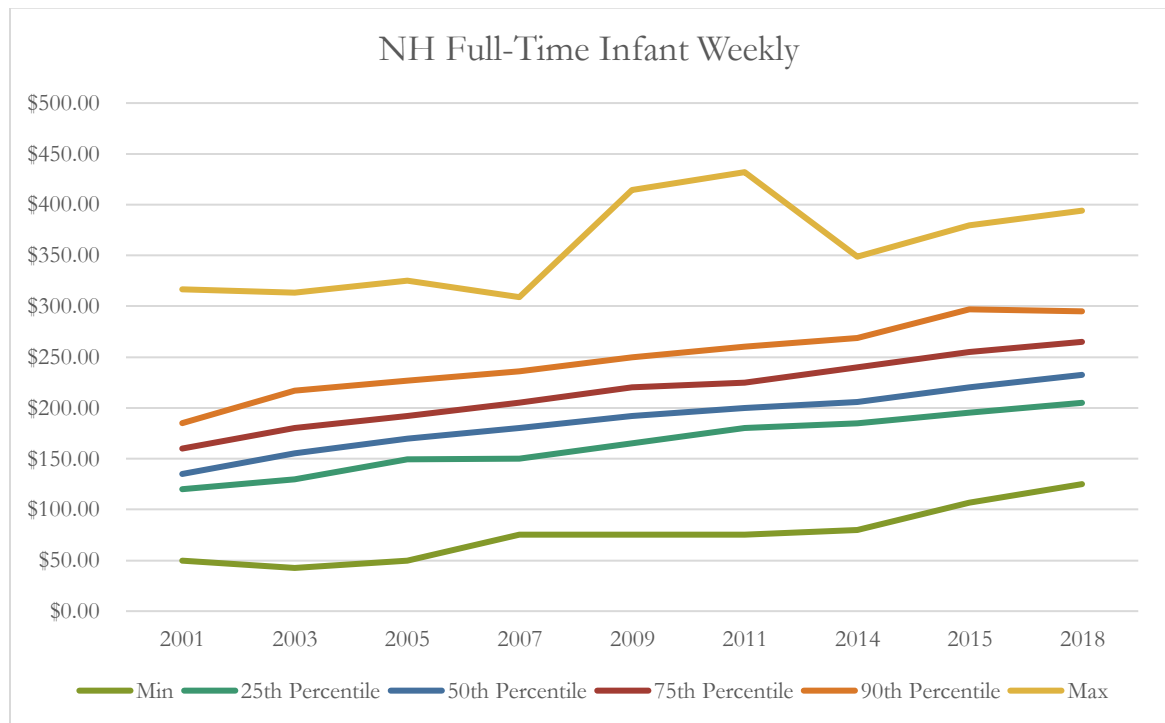


Chart 14. Full-Time Infant Rates by Year

Toddler Care (13-24 months) Weekly Rate

NH toddler care rates have risen steadily over the past surveys. The median (50th percentile) of toddler full time care has increased \$90.00 (69.23%), from \$130.00 in November 2001 to \$220.00. The mean (average) for toddler full time care has increased \$89.44 (67.97%) from \$131.59 in November 2001 to \$221.03 in 2018.

	2001	2003	2005	2007	2009	2011	2014	2015	2018
Min	\$50.00	\$42.50	\$50.00	\$75.00	\$75.00	\$75.00	\$80.00	\$120.00	\$125.00
25 th	\$110.00	\$125.00	\$135.00	\$150.00	\$160.00	\$165.00	\$180.00	\$190.00	\$194.00
50 th	\$130.00	\$150.00	\$160.00	\$168.00	\$182.00	\$187.00	\$200.00	\$205.00	\$220.00
75 th	\$150.00	\$165.00	\$180.00	\$193.50	\$200.00	\$210.00	\$229.00	\$236.00	\$240.00
90 th	\$173.00	\$189.10	\$205.00	\$236.25	\$230.00	\$240.00	\$250.00	\$260.00	\$278.50
Max	\$317.00	\$313.60	\$325.00	\$330.00	\$414.50	\$432.00	\$343.00	\$350.00	\$374.00

Table 33. Full-Time Toddler Weekly Rates by Year

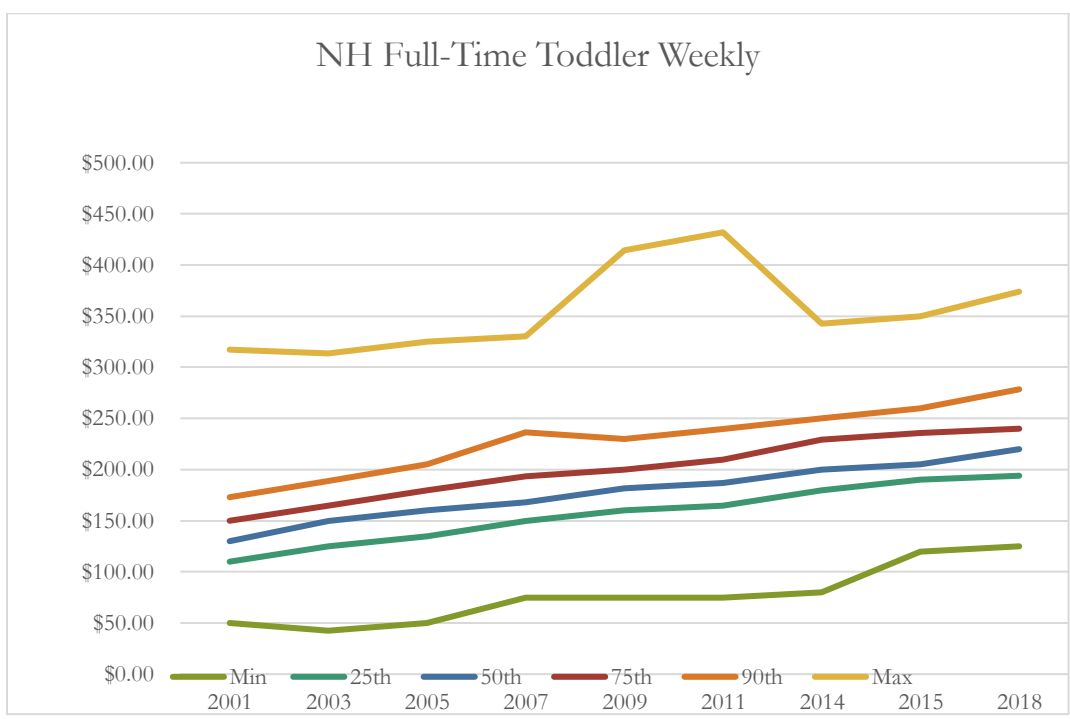


Chart 15. Full-Time Toddler Rates by Year

Young Preschool Age Care (25-35 months) Weekly Rate

NH young preschooler care rates have risen consistently. The median (50th percentile) for young preschooler full time care has increased \$85.00 (70.83%), from \$125.00 in November 2001 to \$210.00 in 2018. The mean (average) for young preschooler full time care has increased \$87.54 (68.23%) from \$128.30 in November 2001 to \$215.84 in 2018.

	2001	2003	2005	2007	2009	2011	2014	2015	2018
Min	\$50.00	\$42.50	\$50.00	\$75.00	\$65.00	\$80.00	\$80.00	\$103.62	\$125.00
25 th	\$106.25	\$125.00	\$130.00	\$145.00	\$150.00	\$160.25	\$175.00	\$175.00	\$192.50
50 th	\$125.00	\$141.88	\$150.00	\$160.00	\$175.00	\$180.00	\$188.00	\$200.00	\$210.00
75 th	\$145.75	\$157.50	\$170.00	\$180.00	\$195.00	\$200.00	\$220.00	\$225.00	\$234.00
90 th	\$165.00	\$175.00	\$190.00	\$200.00	\$220.00	\$223.80	\$243.80	\$250.00	\$266.00
Max	\$317.00	\$313.60	\$325.00	\$277.00	\$414.50	\$432.00	\$375.00	\$350.00	\$369.00

Table 34. Full-Time Young Preschooler Weekly Rates by Year

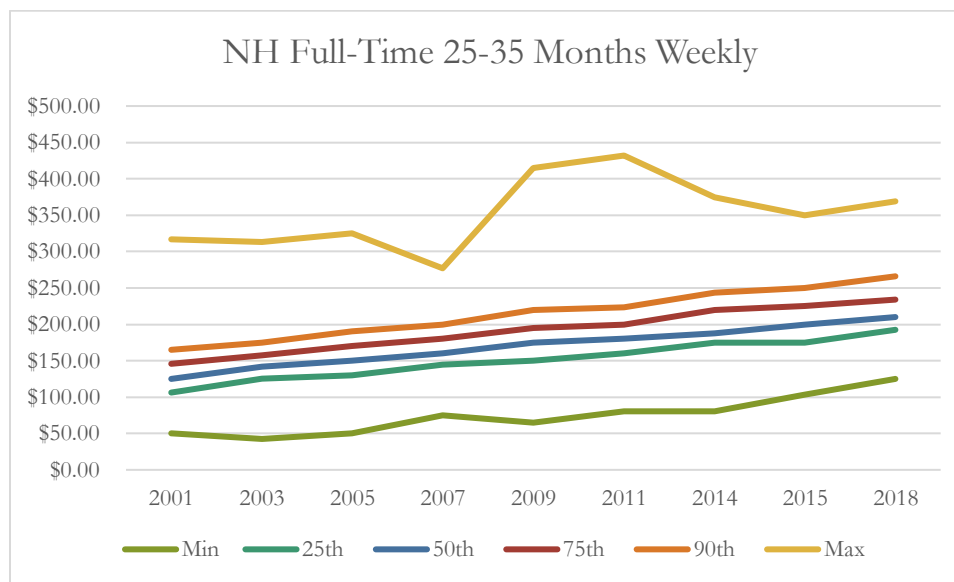


Chart 16. Full-Time Young Preschooler Rates by Year

Preschool Aged Care (36-59 months) Weekly Rate

NH preschool care rates have also risen consistently. The median (50th percentile) for preschool full-time care has increased \$71.00 (59.17%), from \$120.00 in November 2001 to \$191.00 in 2018. The mean (average) for preschool full-time care has increased \$76.49 (63.47%) from \$120.51 in November to \$197.00 in 2018.

	2001	2003	2005	2007	2009	2011	2014	2015	2018
Min	\$50.00	\$42.50	\$50.00	\$75.00	\$65.00	\$75.00	\$80.00	\$103.62	\$120.00
25 th	\$100.00	\$115.00	\$125.00	\$135.00	\$145.00	\$150.00	\$160.00	\$170.00	\$175.00
50 th	\$120.00	\$130.00	\$140.00	\$150.00	\$160.00	\$170.00	\$175.50	\$183.00	\$191.00
75 th	\$135.00	\$145.00	\$158.25	\$165.00	\$180.00	\$185.00	\$199.25	\$200.00	\$212.00
90 th	\$150.00	\$160.00	\$175.00	\$189.20	\$200.00	\$211.00	\$255.00	\$232.00	\$239.60
Max	\$280.00	\$274.30	\$275.00	\$300.00	\$368.50	\$384.00	\$375.00	\$306.00	\$335.00

Table 35. Full-Time Preschooler Weekly Rates by Year

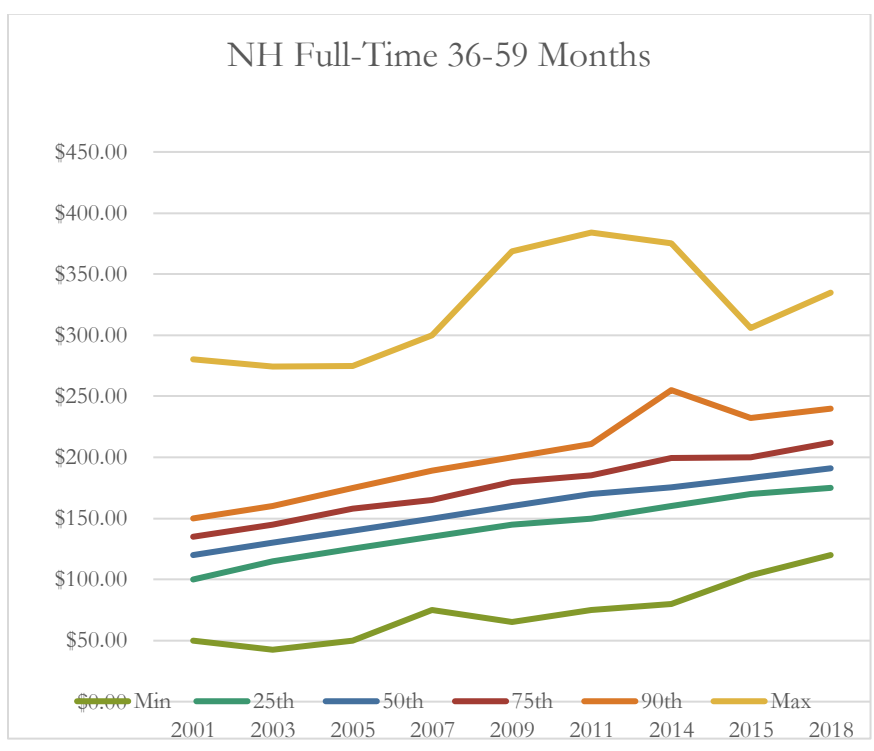


Chart 14. Full-Time Preschooler Rates by Year

Care for Children Between Five and Six Weekly Rate

NH five and six-year-old full-time care rates have risen consistently over the past sixteen years. The median (50th percentile) rate has increased \$65.00 (54.17%), from \$120.00 in November 2001 to \$185.00 in 2018. The mean (average) rate has increased \$62.37 (52.87%), from \$117.96 in November 2001 to \$180.33 in 2018.

	2001	2003	2005	2007	2009	2011	2014	2015	2018
in	\$55.00	\$42.50	\$50.00	\$40.00	\$50.00	\$40.00	\$70.00	\$55.00	\$50.00
5 th	\$100.00	\$107.25	\$110.00	\$130.50	\$140.00	\$145.00	\$155.00	\$160.00	\$168.75
0 th	\$120.00	\$125.00	\$135.00	\$149.50	\$155.00	\$160.00	\$175.00	\$176.00	\$185.00
5 th	\$132.00	\$140.00	\$152.00	\$165.00	\$175.00	\$175.00	\$188.00	\$198.00	\$200.00
0 th	\$146.70	\$160.00	\$170.00	\$185.00	\$195.00	\$195.00	\$225.00	\$234.00	\$228.10
ax	\$280.00	\$195.00	\$275.00	\$235.00	\$368.50	\$275.00	\$275.00	\$294.00	\$274.00

Table 36. Full-Time School Age Weekly Rates by Year

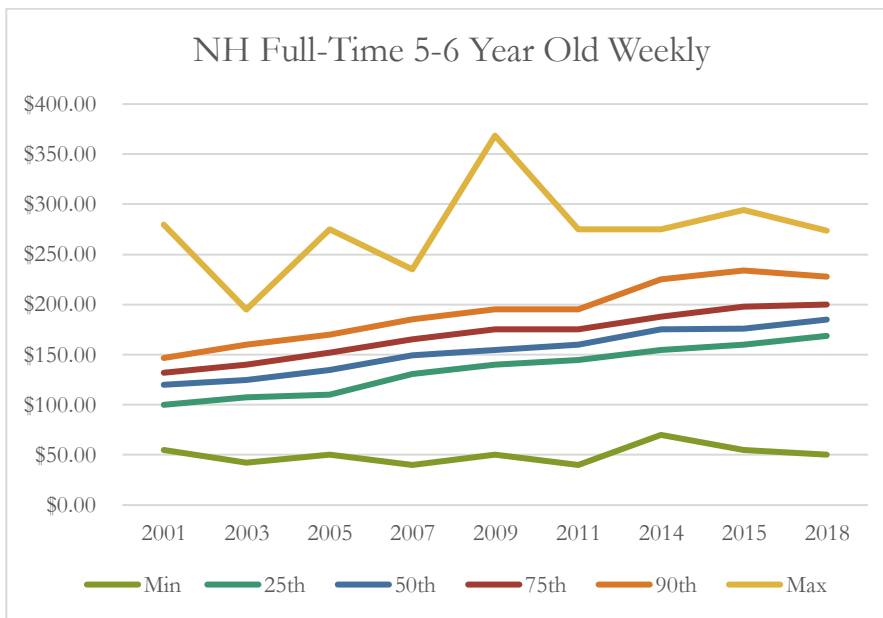


Chart 14. Full-Time School Age Rates by Year

Considerations for Future Market Rate Studies

- a. Request information on the number of Scholarship slots available by program and compare those subtotals by region to the total number of licensed slots in order to better identify the number and probably location of future needs.

- b. Compare the number of licensed child care slots to the number of children aged 0-5 in selected regions to obtain a crude measure of access. This could be further broken down by age categories (infants, toddlers, preschoolers).

- c. Compare Waiting List lengths in child care and early education programs to licensed slots by age categories in selected regions to determine where there may be the greatest need for additional slots. This might potentially be further refined by a breakdown by town or zip code.

- d. Compare Unfilled Slots to licensed slots by age categories in selected regions to determine where there may be the greatest need for additional slots.

- e. Since infant care remains at least a partially unfilled need, prepare a postcard sized survey for NH hospitals to present parents in maternity wards asking their plans regarding child care. The aggregated results could provide excellent data for determining the location of greatest near term need.

f. We should work carefully together next time with Child Care Aware and any other known organization that may be planning a November 2020 survey to ensure providers are not burdened with too many requests at or near the same time, and to avoid any unnecessary duplication of effort.

Training Considerations

Responses to the Additional Questions (items numbered 33-39) imply that at least some providers may not be fully prepared to identify and quantify all program quality costs, perhaps to some degree because of the amount of undocumented extra labor and financial support they provide their programs.

Some training to help providers tease out such costs, and perhaps a template for recording such costs may be worthwhile.

Conclusion

Child care and early education in New Hampshire is more complicated than one might imagine for a relatively small state. With nine completed market rate surveys, the full complexity of this picture is now emerging, and it has become easier to identify several key changes and trends over the past two decades. For general readers, the wealth of detail in this report can appear overwhelming, and this can make it appear slightly redundant if read in its entirety in one sitting. This is one reason most chapters were written so that each can be read and understood separately, and also why a separate Executive Summary will be prepared.

The authors are grateful to all the New Hampshire providers who took time from their busy and demanding schedules to respond to the survey and have tried to secure tokens of our appreciation in the form of randomly selected gift card prize drawings. Perhaps no one works harder on behalf of our state's families and our children.

We are also grateful to the considerable number of people and organizations that partnered in this effort to obtain a complete picture of market rates. These includes Maureen Burke and Debra Nelson and other dedicated staff of the NH Bureau of Child Development and Head Start Collaboration, Melissa Clement and Mychelle Brown at the NH Child Care Licensing Unit, staff of the DHHS Office of Finance, Cynthia Lamper of the DHHS Bureau of Contracts & Procurement, Tracy Pond and Child Care Aware of New Hampshire, and Martha Belanger and the telephone callers at the UNH Survey Center.

[Comments and suggestions are most welcome and should be directed to m.kalinowski@unh.edu.](mailto:m.kalinowski@unh.edu)

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APPENDICES

Appendix A	Market Rate Survey Instrument	80-83
Appendix B	MR2017 Regional Areas	84-85

PLEASE RETURN BY MARCH 21, 2018

Program Name _____

Licensing Number of Program _ _ _ _ _

Town _____

- 1) Did you provide a program for children? on Wednesday, March 7, 2018?
 Yes No *(if no, there is no need to continue. Please return the form. Thanks.)*
- 2) On March 7, 2018 which of the following best fit your program?
 Licensed
 License exempt
 Unlicensed
- 3) What type of program do you have?
 Proprietary (for-profit) program
 Not-for-profit program
- 4) What is your program? *(Choose only one)*
 Child Care Center
 Family Group Child Care program
 Family Child Care Home
 School Age *(only)* Program
 Nursery School/Preschool
 Montessori Program
 Other *(Please explain)*

- 5) On March 7, 2018 was your program Licensed Plus? Yes No
 NAEYC accredited? Yes No
- 6) Did you offer a Head Start program on March 7, 2018?
 Yes No
- 7) Did you receive CCDF scholarship reimbursements from DHHS for the care you provided on March 7, 2018?
 Yes No
- 8) What MONTHS of the year does your program provide services to children?
 Jan Feb Mar Apr
 May Jun Jul Aug
 Sep Oct Nov Dec
- 9) How many HOURS each day during the week of March 7, 2018 did you provide a program for children (NOT how many hours you were at work)?
 __Mon__ Tues __Weds__ Thurs __Fri__
 __Sat__ Sun

- 10) Did you offer any of the following during this week? *(Please check any that apply.)*
 Care from 7-9 pm
 Care from 9-11pm
 Overnight care
 Care PRIMARILY for sick children
- 11) What is your program SCHEDULE?
 Full Day Only
 Partial Day Only
 Full and Partial Day
- 12) _____ How many children were you LICENSED to serve on March 7, 2018?
- 13) _____ How many total children were ENROLLED on March 7, 2018?
- 14) _____ What was your DESIRED CAPACITY *(the number you would have liked to enroll)* on March 7, 2018?
- 15) _____ How many total children ATTENDED on March 7, 2018? *(This number may be higher than licensed capacity due to part-time schedules)*
 a. _____ How many were full fee paying?
 b. _____ How many had DHHS scholarships *(NH state reimbursements)*?
- 16) For children receiving the NH Child Care Scholarship, does your program charge the DHHS-assigned cost share to parents?
 Yes No Does not Apply
- 17) For children receiving the NH Child Care Scholarship, does your program charge parents the difference between the maximum weekly standard rate (WSR) and your actual charge (also known as co-pay)?
 Yes No Does not Apply
- 18) If you answered YES to Question 16 or 17, what was the total amount of cost share or co-pay you collected from families last month?

Cost Share	Co-pay
Full-time children \$	Full-time children \$
Part-time children \$	Part-time children \$
- 19) Do you offer a SLIDING FEE SCALE to families?
 Yes No

FULL-TIME RATES ON MARCH 7, 2018

*Directions: Questions 20-25 refer only to **FULL-TIME** care and education. If you have a **SLIDING FEE SCALE**, please include a copy with your response. If you did not provide any full-time care/education on March 7 please skip to Question 26. Thanks!*

- 20) How do you **most frequently** charge for full-time children?
- a) Hour Day Week Month Other _____
- 21) **6 weeks-12 months**
- a) Did you serve any full-time children 6 wks-12 months on March 7, 2018?
 Yes No If yes, how many this age? _____
- b) How much did you charge? \$ _____ per
- c) Hour Day Week Month Other _____
- 22) **13-24 months**
- a) Did you serve any full-time children 13-24 months on March 7, 2018?
 Yes No If yes, how many this age? _____
- b) How much did you charge? \$ _____ per
- c) Hour Day Week Month Other _____
- 23) **25-35 months**
- a) Did you serve any full-time children 25-35 months on March 7, 2018?
 Yes No If yes, how many this age? _____
- b) How much did you charge? \$ _____ per
- c) Hour Day Week Month Other _____
- 24) **36-59 months**
- a) Did you serve any full-time children 36-59 months on March 7, 2018?
 Yes No If yes, how many this age? _____
- b) How much did you charge? \$ _____ per
- c) Hour Day Week Month Other _____
- 25) **60-72 months**
- a) Did you serve any full-time children 60-72 months on March 7, 2018?
 Yes No If yes, how many this age? _____
- b) How much did you charge? \$ _____ per
- c) Hour Day Week Month Other _____

PART-TIME RATES ON March 7, 2018

Directions: Questions 26-32 refer only to PART-TIME care and education. If you have a *SLIDING FEE SCALE*, please include a copy with your response. If you did not provide any part-time care/education on MARCH 7 then you are finished with this survey. Thanks!

26) How do you **most frequently** charge for part-time children?
 a) Hour Day Week Month Other _____

27) 6 weeks-12 months

a) Did you serve any part-time children 6 wks-12 months on March 7, 2018?
 Yes No If yes, how many this age? _____

b) How much did you charge? \$_____ per

c) Hour Day Week Month Other _____

28) 13-24 months

a) Did you serve any part-time children 13-24 months on March 7, 2018?
 Yes No If yes, how many this age? _____

b) How much did you charge? \$_____ per

c) Hour Day Week Month Other _____

29) 25-35 months

a) Did you serve any part-time children 25-35 months on March 7, 2018?
 Yes No If yes, how many this age? _____

b) How much did you charge? \$_____ per

c) Hour Day Week Month Other _____

30) 36-59 months

a) Did you serve any part-time children 36-59 months on March 7, 2018?
 Yes No If yes, how many this age? _____

b) How much did you charge? \$_____ per

c) Hour Day Week Month Other _____

31) 60-72 months (Please see Question #30 before responding)

a) Did you serve any part-time children 60-72 months on March 7, 2018?
 Yes No If yes, how many this age? _____

b) How much did you charge? \$_____ per

c) Hour Day Week Month Other _____

32) School Age Children

a) Did you serve any school age children **72-155 months** old on March 7, 2018?
 Before AND After School Yes No If yes, how many? _____
 Before School ONLY Yes No If yes, how many? _____
 After School ONLY Yes No If yes, how many? _____

b) How much did you charge children aged **72-155 months** old on March 7, 2018?
 Before AND After School \$_____per Hour Day Week Month Other _____
 Before School ONLY \$_____per Hour Day Week Month Other _____
 After School ONLY \$_____per Hour Day Week Month Other _____

COST SHARE AND CO-PAY QUESTIONS

33) If you charge cost share and/or copay, what would be the impact on your program if you no longer charged such payments? For example, would there be an impact on staffing, on the number of children being served, or on other things? Please briefly explain.

34) If you charge cost share and/or copay, do you charge families at all step levels?

Yes No

If your answer was NO, at which step levels do you collect these payments? (check all that apply)

1 2 3 4 5 6 7

35) Was your program able to be **fully enrolled** during 2017?

Yes No

If **YES**, do you have a Wait List?

Yes No

If **NO**, what was the primary reason (please select only one of the following)

- Lack of families/not enough children enrolled
- Competition/area saturated with other providers
- Inability to find enough staff to fill all vacant positions
- Inability to maintain staffing/keep staff
- Other (please explain)

STAFF TURNOVER QUESTIONS

36) Please indicate number of staff positions in your program and also staff turnover during 2017.

A	B	C	D	E
Position	# of Full-time Staff	# of Full-time staff that left in 2017 (can be more than Column B)	# of Part-time Staff	# of Part-time staff that left in 2017 (can be more than Column D)
Director				
Teacher				
Support Staff				
TOTAL				

PROGRAM QUALITY QUESTIONS

37) What do you estimate the annual cost to your program to fully implement the new health and safety, plus first aid and CPR requirements? \$_____

38) If you are currently Licensed Plus, what would be the annual cost to your program to become or maintain the Licensed Plus designation? \$_____

39) If you are currently nationally accredited, what would be the annual cost to your program to become or maintain the national accreditation designation? \$_____

MARKET RATE SURVEY REGIONS
Exhibit A-1

Central Region	Eastern Region	Northern Region	Southern Region	Southwestern Region
ALEXANDRIA	BARRINGTON	ALBANY	AMHERST	ACWORTH
ALLENSTOWN	BRENTWOOD	BARTLETT	ATKINSONE	ALSTEAD
ALTON	CANDIA	BATH	AUBURN	ANTRIM
ANDOVER	DEERFIELD	BENTON	BEDFORD	ASHUELOT
ASHLAND	DOVER	BERLIN	BROOKLINE	BENNINGTON
BARNSTEAD	DURHAM	BETHLEHEM	CHESTER	CANAAN
BELMONT	EAST KINGSTON	BROOKFIELD	DANVILLE	CHARLESTOWN
BOSCAWEN	EPPING	CARROLL	DERRY	CHESTERFIELD
BOW	EXETER	CHATHAM	FRANCISTOWN	CLAREMONT
BRADFORD	FARMINGTON	CHOCORUA	GOFFSTOWN	CORNISH
BRIDGEWATER	FREMONT	CLARKSVILLE	GREENVILLE	CROYDON
BRISTOL	GONIC	COLEBROOK	HAMPSTEAD	DEERING
CAMPTON	GREENLAND	COLUMBIA	HOLLIS	DREWVILLE
CANTERBURY	HAMPTON	CONWAY	HUDSON	DUBLIN
CENTER HARBOR	HAMPTON FALLS	DALTON	LITCHFIELD	ENFIELD
CHICHESTER	KENSINGTON	DIXVILLE	LONDONDERRY	FITZWILLIAM
CONCORD	KINGSTON	DUMMER	LYNDEBOROUGH	FRANCASTOWN
CONTOOCOOK	LEE	EASTON	MANCHESTER	GEORGES MILLS
DANBURY	MADBURY	EATON	MASON	GILSUM
DORCHESTER	MIDDLETON	EFFINGHAM	MERRIMACK	GOSHEN
DUNBARTON	MILTON	ERROL	MILFORD	GRAFTON
ELKINS	MILTON MILLS	FRANCONIA	MONT VERNON	GRANTHAM
ELLSWORTH	NEW DURHAM	FREEDOM	NASHUA	GREENFIELD
EPSOM	NEWCASTLE	GLEN	NEW BOSTON	GUILD
FRANKLIN	NEWFIELDS	GLENCLIFF	NEWTON	HANCOCK
GILFORD	NEWINGTON	GORHAM	PELHAM	HANOVER
GILMANTON	NEWMARKET	GROVETON	PINARVILLE	HARRISVILLE
GROTON	NORTH HAMPTON	HALE'S LOCTION	PLAISTOW	HINSDALE
HEBRON	NORTHWOOD	HART'S LOCATION	REEDS FERRY	JAFFREY
HENNIKER	NOTTINGHAM	HAVERHILL	WILTON	KEENE
HILL	PORTSMOUTH	INTERVALE	SALEM	LANGDON
HILLSBORO	RAYMOND	JACKSON	SANDOWN	LEBANON
HOLDERNESS	ROCHESTER	JEFFERSON	WEARE	LEMPSTER
HOOKSETT	ROLLINSFORD	KEARSARGE	WINDHAM	LYME
HOPKINTON	RYE	LANCASTER		LYNDEBOROUGH
LACONIA	SEABROOK	LANDAFF		MARLBOROUGH
LAKEPORT	SOMERSWORTH	LINCOLN		MARLOW
LOUDON	SOUTH HAMPTON	LISBON		MERIDEN
MEREDITH	STRAFFORD	LITTLETON		NELSON
NEW HAMPTON	STRATHAM	LIVERMORE		NEW IPSWICH
NEW LONDON	UNION	LYMAN		NEWPORT
NEWBURY		MADISON		ORANGE
NORTHFIELD		MELVIN VILLAGE		ORFORD
PEMBROKE		MILAN		PETERBOROUGH
PENACOOK		MILLSFIELD		PLAINFIELD
PITTSFIELD		MONROE		RICHMOND
PLYMOUTH		MOULTONBOROUGH		RINDGE
POTTER PLACE		NORTH CONWAY		ROXBURY
RUMNEY		N. STRATFORD		SHARON
SALISBURY		NORTHUMBERLAND		SPOFFORD
SANBORNTON		OSSIPEE		SPRINGFIELD
SILVER LAKE		PERCY		STODDARD
SUNCOOK		PIERMONT		SULLIVAN
SUTTON		PIKE		SUNAPEE
THORNTON		PITTSBURG		SURRY
TILTON		RANDOLPH		SWANZEY
WARNER		SANBORNVILLE		TEMPLE

Exhibit A-1: MARKET RATE SURVEY REGIONS

Central Region	Eastern Region	Northern Region	Southern Region	Southwestern Region
WEBSTER		SANDWICH		TROY
WILMOT		SHELBURNE		UNITY
WATERVILLE VALLEY		SILVERLAKE		W. LEBANON
WENTWORTH		SNOWVILLE		WALPOLE
WENTWORTH LOCATION		STARK		WASHINGTON
WINNISQUAM		STEWARTSTOWN		WESTMORELAND
		STRATFORD		WINCHESTER
		SUGAR HILL		WINDSOR
		TAMWORTH		
		TUFTONBORO		
		TWIN MOUNTAIN		
		WAKEFIELD		
		WARREN		
		W STEWARTSON		
		WHITEFIELD		
		WOLFEBORO		
		WOODSTOCK		
		WOODSVILLE		
		WHITEFIELD		
		WOLFEBORO		
		WOODSTOCK		
		WOODSVILLE		