



Pre-K Feasibility Study

Forsyth County, North Carolina



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THE
PRE·K
PRIORITY

The Pre-K Priority is a coalition of Forsyth County organizations dedicated to increasing opportunities for children to attend quality Pre-Kindergarten programs.

 **Forsyth Futures**

Forsyth Futures studies our community to inform action by providing valuable context to community stakeholders and advocates. We believe that a better-informed community is empowered to advocate for the evidence-based policies and solutions that can improve quality of life for all.

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Introduction

The goal of the Pre-K Feasibility Study is to learn more about the perceptions, existing utilization, and interest in Pre-K/preschool services for families in Forsyth County, North Carolina. In addition to understanding existing programs and services, the study examines facility space and staffing capacity to determine what it would take to help improve and potentially expand Pre-K/preschool services.

The Pre-K feasibility study was conducted by Forsyth Futures in partnership with Family Services, Inc. and funded by the Kate B. Reynolds Charitable Trust. Forsyth Futures is a data and research nonprofit that seeks to study, share findings, and convene with diverse community stakeholders to support data-informed decision making for program planning, alignment, and community impact.

Research Components

Interviews and Focus Groups

Throughout 2019, Forsyth Futures engaged in primary data collection and analysis, conducting interviews with stakeholders and participants across the Pre-K system. These included interviews with parents, Pre-K program administrators, teachers, post-secondary instructors, and administrators in universal Pre-K communities outside of Forsyth County. In addition to interviews, focus groups were conducted with parents and students.

Surveys

Forsyth Futures created, distributed, and analyzed the results of two surveys. One survey aimed to gain parents' perceptions of Pre-K and was completed by over 700 households in Forsyth County. The other collected information from Pre-K and child care providers such as enrollment, number of teachers, and willingness to meet various Pre-K Priority quality standards. Over 75 providers completed this survey.

Secondary Data

Forsyth Futures' researchers studied secondary data on Pre-K enrollment patterns, population patterns within Forsyth County and population trends, and other secondary sources. This data was used to highlight patterns in Pre-K enrollment and pinpoint demand hot spots.

Key Findings

Current Care Arrangements and Parent Preferences

Forsyth Futures' estimates that 49% of four year olds in Forsyth County are currently enrolled in licensed centers and homes or unlicensed elementary school classrooms, and an additional 18% of four-year-olds are enrolled in half-day programs. The majority of parents report being satisfied or very satisfied with their children's care arrangements, and income and race are not correlated with this satisfaction. Many parents who do not have their four-year-old children in a formal care arrangement reported being satisfied with that arrangement, but when asked how likely they would be to enroll their four-year-old in a Pre-K/preschool program if cost was not a factor, about 91% reported that they would be very likely to send their child to Pre-K/preschool. The most commonly reported considerations that would prevent parents from enrolling their children in a Pre-K/preschool program were the cost of care, limited slot availability, lack of full-time or 8/9 hour care, classroom overcrowding, and a lack of year-round care. Parents generally expressed a preference for full-day care, a schedule similar to the school system, and elementary or private center settings.

Capacity and Affordability

Forsyth Futures' estimates that there are currently between 560 and 1,110 open slots for four-year-olds in Forsyth County, but if 91% of parents were to enroll their children in the current system there would be an estimated shortage of between 230 and 1,660 slots. Additionally, while the number of four-year-olds has decreased in Forsyth County in recent years, the number is expected to begin increasing and continue increasing into the near future in 2020, which could increase the demand for slots. Despite the estimated current surplus of 560 - 1,110 slots, many parents reported that there were not enough slots, especially slots that were both affordable and high quality. The median cost of full-day Pre-K/preschool for four-year-olds according to the North Carolina State Market Rate Study was \$626, but the median cost reported as affordable by parents in the parent survey was \$200 a month. Only 6% of parent survey respondents identified a cost of over \$626 a month as affordable, which suggests that parents may face challenges finding Pre-K/preschool options that they consider affordable. Forsyth Futures also compared the number of four-year-olds enrolled in any program to the number of children living in different areas of the county and found that the greatest disparity of potential demand to enrollment were in the 27105 and 27107 ZIP codes.

Pre-K Teachers and Assistant Teachers

When discussing the potential future demand for teachers in interviews, Pre-K program administrators generally expressed that they did not believe there are enough teachers in Forsyth County to meet the potential demand for teachers in the future, especially if those teachers were required to have a BK license. This issue may be compounded by what current teachers and students in early childhood education programs at local colleges and universities described as decreasing interest in the field. Forsyth Future's estimates that there are likely not enough teachers with BK licenses or assistant teachers with Child Development Associate's degrees to meet the potential demand for Pre-K if 91% of parents were to enroll their children in Pre-K. When considering the staffing needs of Pre-K programs, it is also important to consider that about 22% of children under the age of five in Forsyth County live in homes where Spanish is spoken as the primary language and that about 7% of all children under the age of five live in households where all of the members over the age of 14 have at least some difficulty speaking English.

In addressing the supply of teachers, recruitment and retention are a particular challenge for licensed private sites and GS110 facilities, but appear to be less of a challenge for school-based and some half day sites. The factors reported most frequently that contribute to challenges with recruitment and retention of qualified teachers were low salaries, the difficulty of the work, and dissatisfaction with management. If the number of qualified teachers in Forsyth County is to be increased by increasing the educational attainment of teachers and students entering the teaching field, one of the primary supports needed will be financial assistance, especially for teachers who need to earn an income while pursuing their degree or who may need assistance with the cost of a college degree program.

Willingness and Ability to Participate in Pre-K Priority

Current Pre-K providers generally expressed a willingness to participate in a public funding program for Pre-K. The main considerations that would prevent them from doing so are the regulations attached to the funding and not wanting to displace private pay families. Most providers would be willing to expand, though a little more than half would need resources to do so. The most common resources needed were assistance recruiting staff, additional funding, assistance with materials, assistance with building new space, and assistance upfitting current space to meet licensing requirements. Lack of physical space to expand was the most common barrier to potentially expanding capacity.

No sites are currently meeting all of the Pre-K Priority's proposed quality standards, and no sites reported being willing to meet all of the standards without additional resources or supports. About 57% of providers were willing and able to meet all of the standards if additional supports were provided. Screenings, especially for mental health, were the most commonly reported as requiring more resources and supports to provide. A notable minority of providers also reported not being willing or able to provide mental and physical health screenings. Most providers reported needing support for a family support staff person, but most providers are willing to provide this service with support. When parents were asked about what aspects of quality were most important to them in a Pre-K program they generally described factors relating to the curriculum and teacher competence.

Impacts of Pre-K Expansion

Administrators generally reported that they anticipate that Pre-K expansion would improve kindergarten readiness and educational equity and expressed hopes for an expanded system to have diverse classroom settings. Administrators also expressed concerns that Pre-K expansion would negatively affect private childcare providers and that it may limit the number of teachers and childcare slots available for children ages 0-3. Peer communities that have implemented expanded Pre-K programs recommended considering a consistent or universal application process and considering the administration of the program, including an application process, as a part of the program design, and they encouraged assessing how an expanded Pre-k program might intersect with existing programs and services. They also recommended assessing the nature and scope of information technology support needed for the initiative and considering how the data for the program will be managed. During program implementation and planning, they recommended developing good timelines, setting priorities, and incorporating local community leadership.

Special Thanks

Forsyth Futures would like to thank those in the community whose support made this study possible.

Funder

Kate B. Reynolds Charitable Trust

Project Support

Family Services, Inc. and the Pre-K Priority Initiative

Interview, Focus Group, and Survey Partners

Action4Equity	Latino Community Services
Asset-Building Coalition	Love Out Loud
CDSA/Amos Cottage	Megan Gregory
Centers for Exceptional Children	Ministers' Conference
Child Care Resource Center	Neighbors for Better Neighborhoods
Department of Public Health	North Point Academy
Department of Social Services	Novant Health
Downtown Health Plaza	Partnership for Prosperity
Family Services, Inc.	READ WS
Financial Pathways of the Piedmont	Second Harvest Food Bank
First Baptist Church of Kernersville	Smart Start of Forsyth County
Forsyth County Public Library	The Hispanic League
Forsyth Technical Community College	The Maya Angelou Center
Habitat for Humanity	Triad Moms on Main
HandsOn Northwest NC	United Way of Forsyth County
Imagine Forsyth	Wake Forest Baptist Health
Imprints Cares	Winston-Salem Foundation
Kaleideum	Winston-Salem State University
Knollwood Baptist Church	Zina Johnson
La Petite Academy	

Young Children and Their Families

The county's demographics provide context to current Pre-K enrollment figures. They shed light on the percentage of children enrolled in Pre-K and the degree to which Pre-K children reflect the community.

This section lays out child demographics within Forsyth County. It provides population totals for four-year-olds and then breaks the population down by race / ethnicity and residential geography. The section also includes household characteristics for children under five. Children under five are used when examining household characteristics because the data for four-year-olds has a large margin of error.

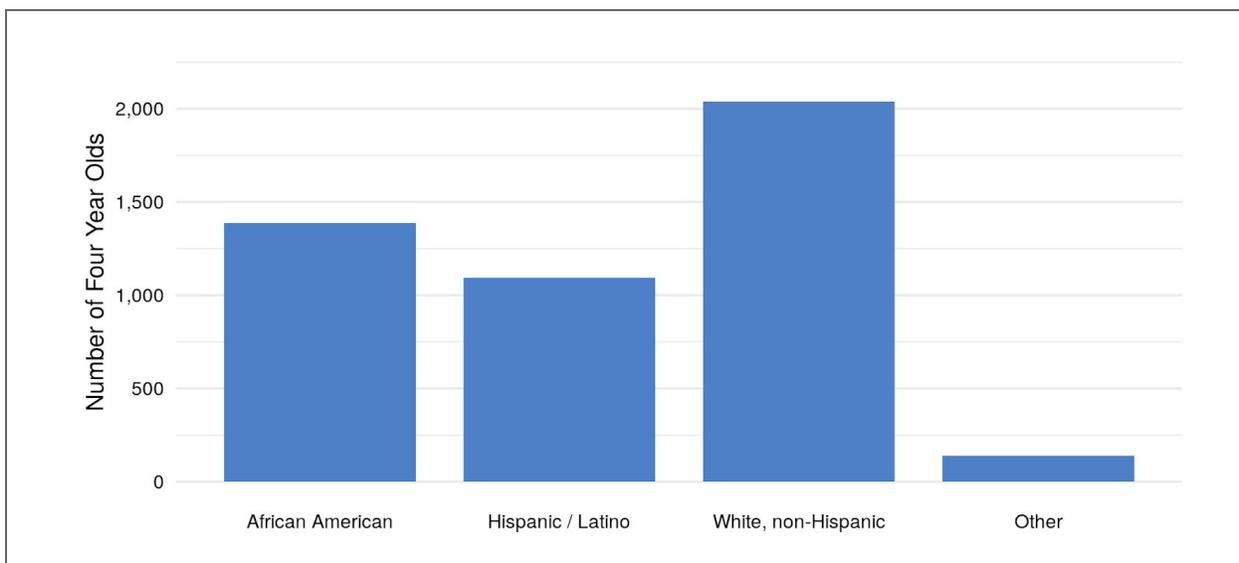
Key Findings: Young Children and Their Families

- There were approximately 4,600 four-year-olds in Forsyth County in 2018.
- The population of four-year-old children is very diverse racially, economically, and geographically.
- About 65% of children under the age of five are in households where the only or both parents work, and it is likely that some kind of care arrangement is made for them.
- About 22% of children under the age of five live in Spanish-speaking households, and about 7% of children in this age group live in households in which all members over the age of 14 have at least some difficulty speaking English.

Number of Four-Year-Old Children

There were approximately 4,660 four-year-olds in Forsyth County in 2018.¹ As the graph below shows, these children come from racially diverse backgrounds. In fact, Forsyth County is a majority-minority community for four-year-olds, meaning there are more minority four-year olds in the county than white, non-Hispanic children.

Four-Year-Olds by Race/Ethnicity



The National Center for Health Statistics. Bridged-Race Resident Population Estimates

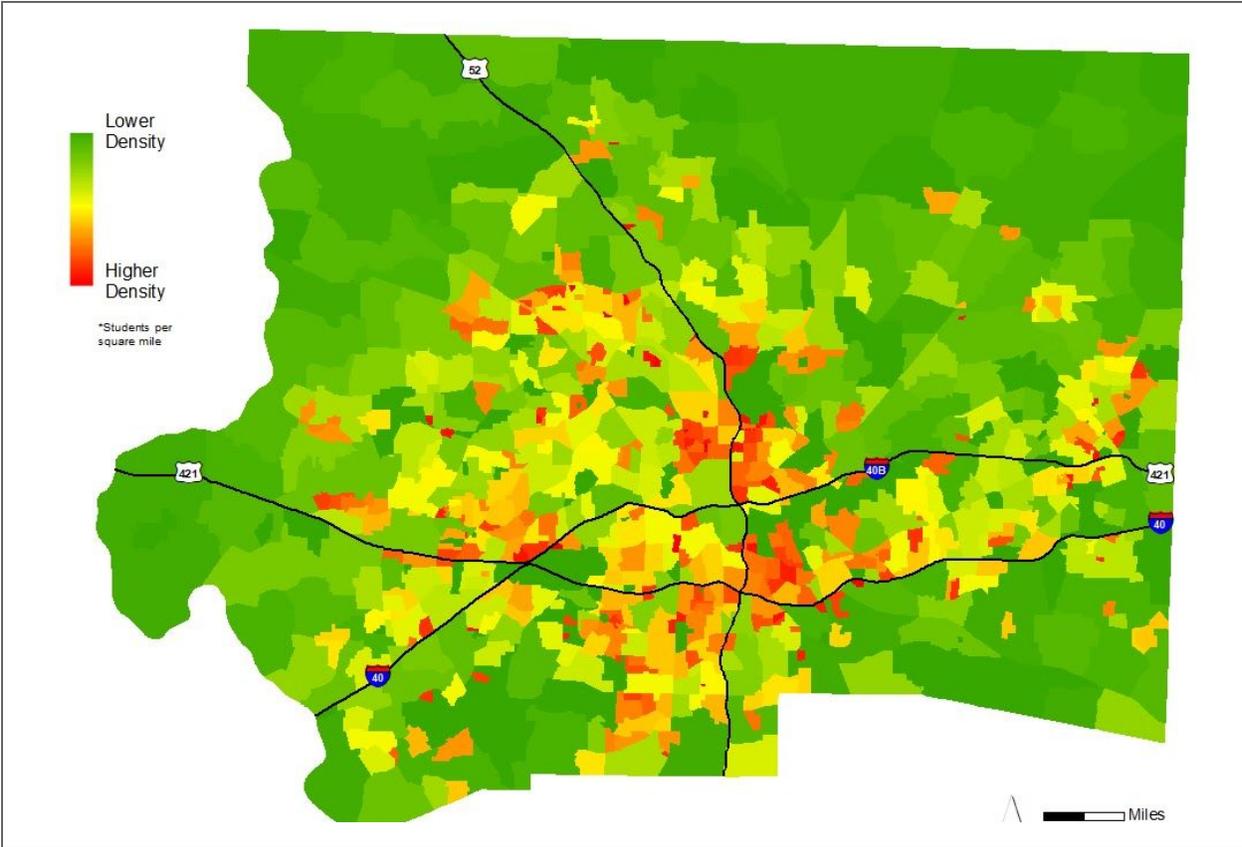
Race/Ethnicity	Population Estimate	Percentage of Population
African American	1338	29%
Hispanic / Latino	1093	24%
White, non-Hispanic	2039	44%
Other	140	3%

¹ The National Center for Health Statistics. Bridged-Race Resident Population Estimates.

Location of Four-Year Old Children

Forsyth County is geographically diverse with rural, suburban, and urban areas. The map below shows the population density of Kindergarten students in Forsyth County for the 2018-19 school year. The distribution patterns of where children live does not change much from year to year, so the distribution of Kindergarten students is a good approximation of where four-year old children live.

Estimated Population Density of Four-Year Old Children (2018-19 School Year)



Winston-Salem Forsyth County Schools, Department of School Assignment, 2018-19 School Year

Children Four and Under by Household Characteristics

Due to large margins of error, household characteristics cannot be tabulated for four-year-olds. But, they can be accurately calculated for children four and under. As a result, the rest of this section presents population figures for children four and under based on various household characteristics.

Household Income

The median income for households with children four and under is \$45,000.² This means that half of all households with children four and under have incomes below \$45,000 and half have incomes above this amount. As the table below shows, these children live in households with a wide range of incomes.

Households with Children Four and Under by Household Income

Household Income	Number of Children	Percentage
Less than \$10,000	2,833	12%
\$10,000 - \$19,999	2,978	13%
\$20,000 - \$29,999	3,011	13%
\$30,000 - \$39,999	2,108	9%
\$40,000 - \$49,999	1,350	6%
\$50,000 - \$74,999	4,013	18%
\$75,000 - \$99,999	2,722	12%
\$100,000 and over	3,942	17%

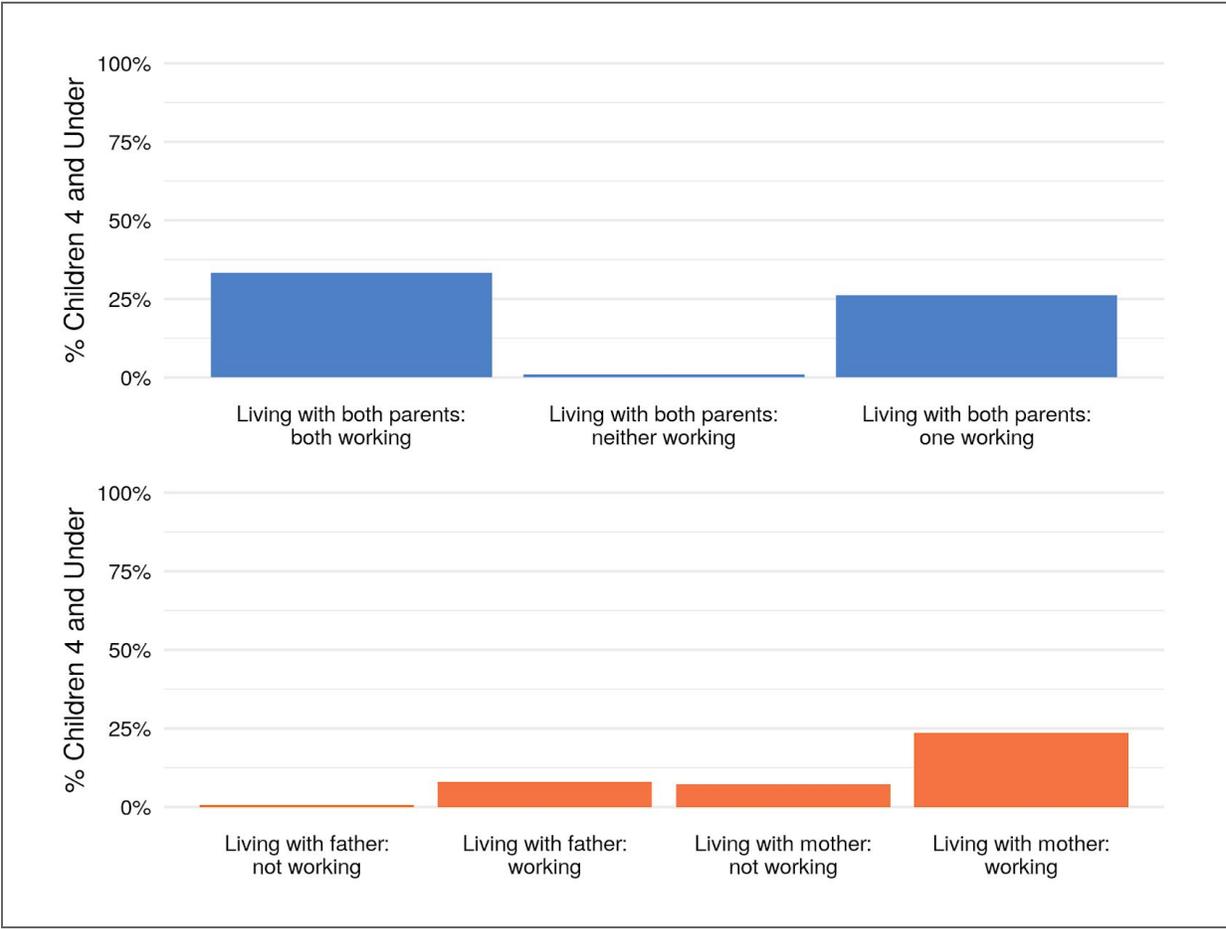
U.S. Census Bureau; American Community Survey, Five-Year Public Use Microdata Sample, 2017

² U.S. Census Bureau; American Community Survey, Five-Year Public Use Microdata Sample, 2017

Employment Status of Parents

Stable employment not only provides a steady income stream to help pay for Pre-K, but also leads to financial comfort for the child and family. The graph below looks at employment through the lens of the parents' employment status, with various family compositions provided. It shows the percentage of children residing in households of a given family composition, along with the employment status of the child's parent or parents who are living in the household.

Four and Under Population by Employment Status of Parents



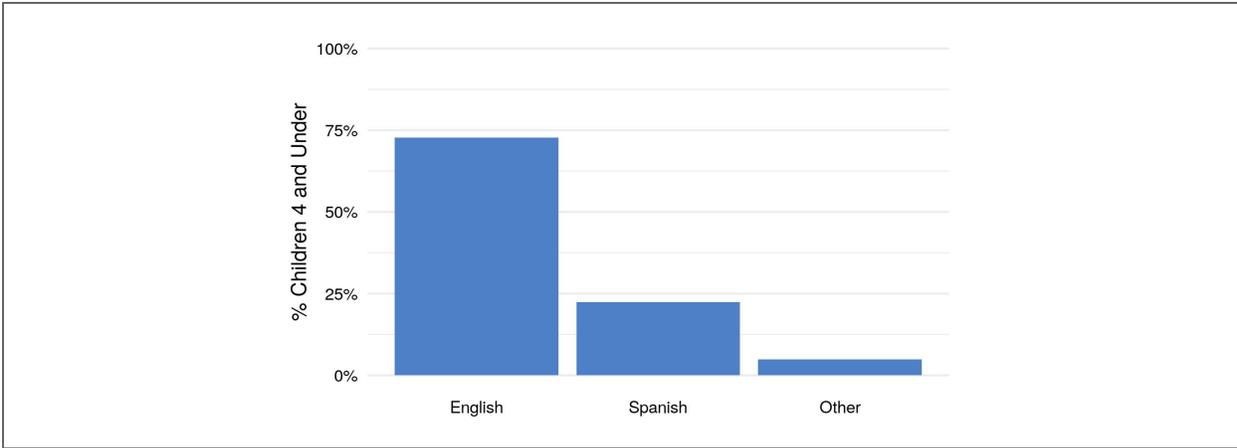
U.S. Census Bureau; American Community Survey, Five-Year Public Use Microdata Sample, 2017

Family Composition / Employment Status	Estimated Percentage of Children
<i>Living with both parents:</i>	
Both working	33%
Neither working	1%
One working	26%
<i>Living with father:</i>	
Working	8%
Not working	1%
<i>Living with mother:</i>	
Working	24%
Not working	7%

Language Spoken at Home

The following plot breaks down children by their household language. It shows the percentage of children four and under living in households speaking a given language as its primary one. 73% of children four and under live in English-speaking households. But at 22%, there is a sizable minority of children living in Spanish-speaking households.

Four and Under Population by Household Language



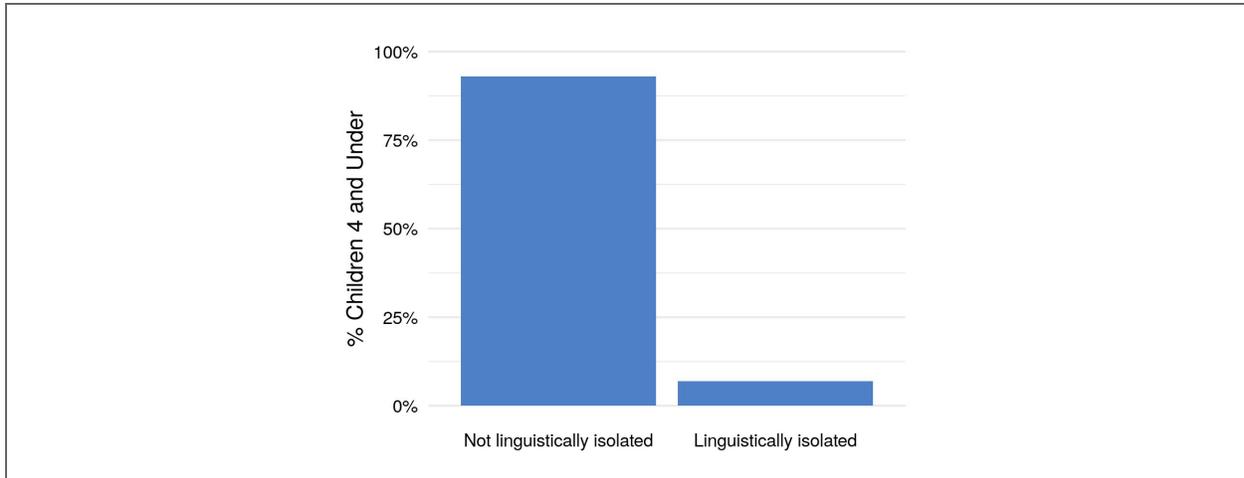
U.S. Census Bureau; American Community Survey, Five-Year Public Use Microdata Sample, 2017

Household Language	Estimated Percentage of Children
English	73%
Spanish	22%
Other	5%

Linguistic Isolation

Linguistic isolation is another way to look at language usage within households. A linguistically isolated household is one where all members of the household 14 years old and over have at least some difficulty with English. The plot below shows the percentage of children four and under living in linguistically isolated households within Forsyth County.

Four and Under Population by Linguistic Isolation



U.S. Census Bureau; American Community Survey, Five-Year Public Use Microdata Sample, 2017

Linguistic Isolation Status	Estimated Percentage of Children
Not linguistically isolated	93%
Linguistically isolated	7%

Care Arrangements for Four-Year-Old Children

This section looks at the care arrangements of four-year-old children. It includes data on how many four-year-olds are in facilities in Forsyth County, broken down by various facility types and categories. The next part then has data on how satisfied parents are with their arrangements, the cost and availability of care, barriers to accessing care, and questions of equity in access to care.

Key Findings: Care Arrangements for Four-Year-Old Children

- Slightly less than half of four-year-olds are in formal care arrangements for most of the day, and the majority of parents are satisfied with their four-year-old children's care arrangements.
- The median cost of child care for four-year-olds according to the North Carolina State Market Rate Study for full-day centers and homes was \$626 in 2017, but the median cost reported as affordable by parents in the parent survey was \$200 a month. Only 6% of parents responding to the survey identified a cost over \$626 a month as affordable.
- Forsyth Futures' estimates that there are currently between 560 and 1,110 open slots, but if all of the parents who expressed interest in enrolling their child in Pre-K if cost was not a factor were to enroll there would be an estimated shortage of between 230 and 1,660 slots.
- The most commonly reported factors that would prevent parents from enrolling their children in a Pre-K program were the cost of care, limited slot availability, lack of full-time or 8/9 hour care, classroom overcrowding, and lack of year-round care.

Number of Four-Year-Old Children in Facilities

Between August 2018 and July 2019, there were approximately 1,803 four-year-old children in licensed centers and home care facilities within Forsyth County per month, on average.³ This equates to 39% of the 4,660 four-year-olds in Forsyth County. Adding unlicensed elementary schools to this total raises it to 2,302, or 49% of Forsyth County's four-year-olds.

Adding more refinement to these numbers, there were at least 854 children enrolled in formal half-day programs during the 2018-2019 school year.⁴ Adding this to the cumulative number of 2,302 raises the percentage of children in either licensed facilities, unlicensed elementary schools, or half-day programs up to at least 67% of the four-year-old population.

These are only estimates of the total number of children enrolled because it is derived, in part, by summing the enrollment at all types of facilities and some children may be enrolled at multiple facilities. In such cases, these children will be counted twice. Therefore, the true number of children enrolled in licensed facilities is likely slightly less than these reported numbers.

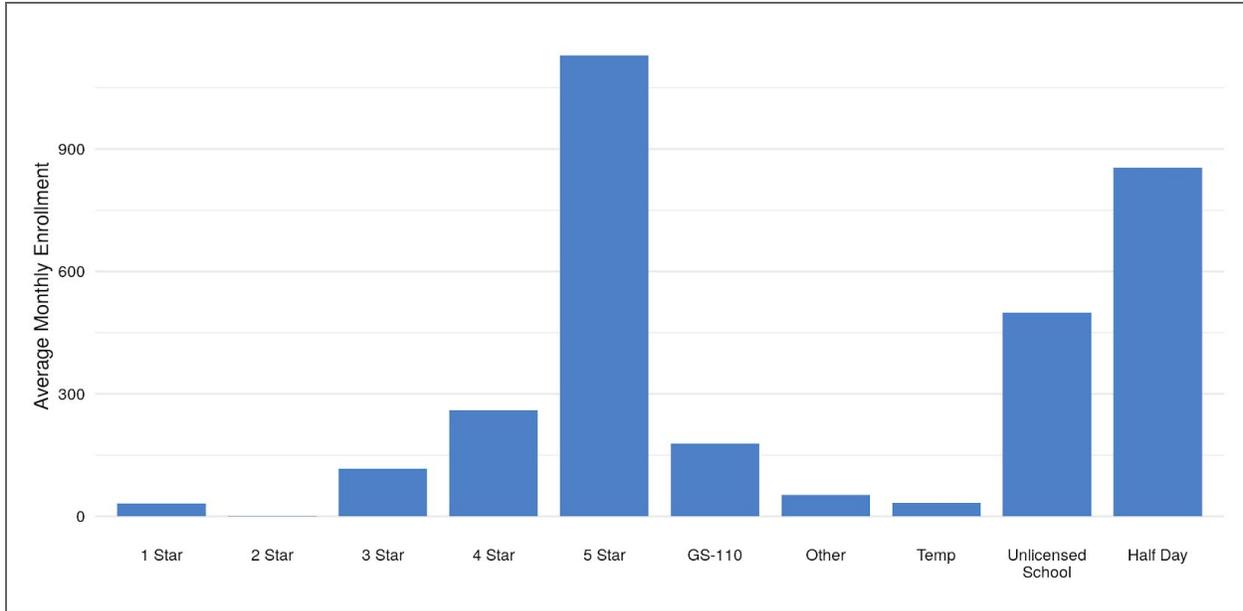
This subsection further breaks down the enrollment figure by licensing status, category of five-star facility, and type. All average monthly enrollments represent the average between August 2018 and July 2019. The plot below shows the number of facilities by licensing status. For the licensed status categories, the star ratings, GS-110, other, and temp categories represents licensed facilities. Licensed elementary schools will fall under these categories, while unlicensed schools reside in their own category.

³North Carolina Child Care Statistical Report. Retrieved December 12, 2019, from <https://ncchildcare.ncdhhs.gov/County/Child-Care-Snapshot/Child-Care-Statistical-Report>

⁴ There were likely more than 854 children enrolled in half-day programs during the 2018-2019 school year, but the data source did not have counts for all facilities. So, all numbers in this report showing 854 half-day students are likely an undercount.

The plot below shows the number of facilities by licensing status. For the licensed status categories, the star ratings, GS-110, other, and temp categories represents licensed facilities. Licensed elementary schools will fall under these categories, while unlicensed schools reside in their own category.

Four-Year-Old Enrollment by Licensing Status

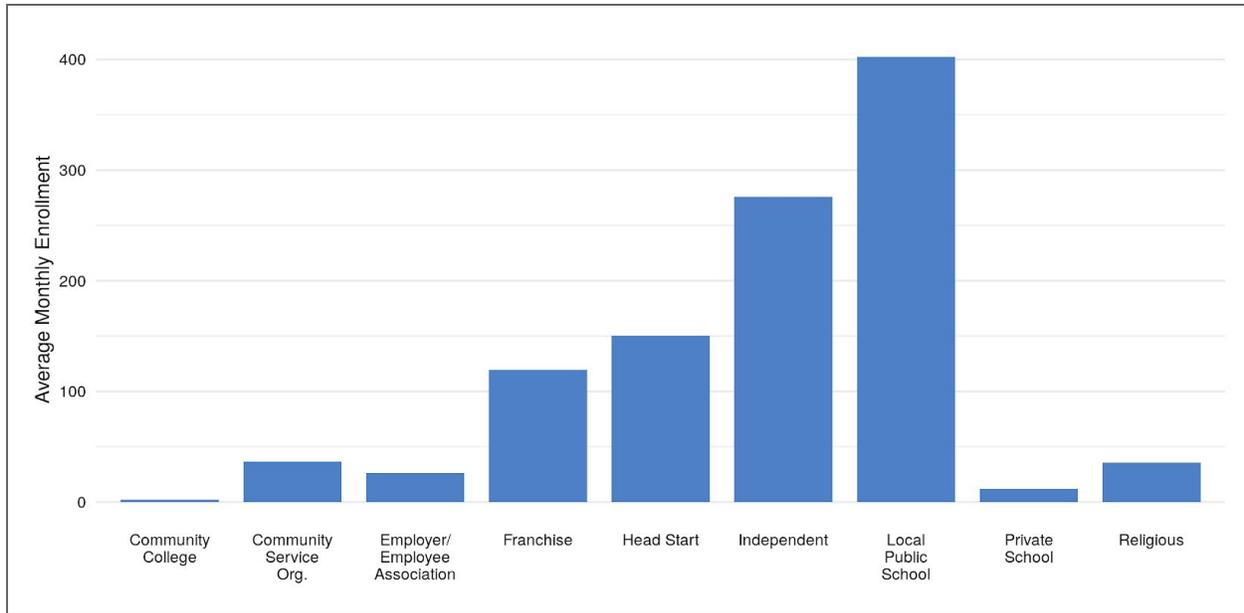


North Carolina Child Care Statistical Report; Forsyth Futures' Provider Survey; Family Services

Licensing Status	Enrollment
1 Star	32
2 Star	2
3 Star	117
4 Star	260
5 Star	1176
GS-110	178
Other	53
Temp	33
Unlicensed School	451
Half Day	854

Five-star facilities make up the largest licensing status, but this group is not a synchronous whole. It is diverse. The plot below shows this diversity by breaking down licensed five-star facility enrollment into categories based on the North Carolina DCDEE listed categories.

Four-Year-Old Enrollment by Licensed Five Star Category

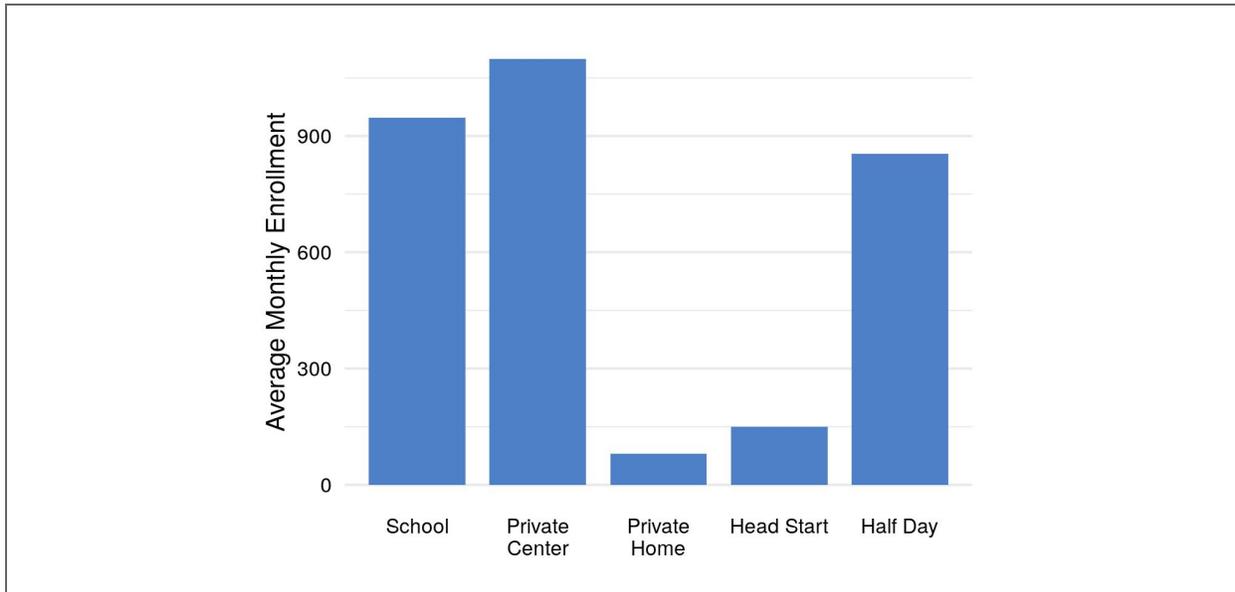


North Carolina Child Care Statistical Report; Forsyth Futures' Provider Survey; Family Services

Category	Enrollment
Community College	2
Community Service Org.	45
Employer/Employee Association	37
Franchise	141
Head Start	150
Independent	291
Local Public School	412
Private School	22
Religious	36

The plot below shows various facility types. The school type is licensed and unlicensed elementary schools, while the private center and private home types represent licensed centers and homes. Further, Head Start only represents enrollment at Head Start facilities. Some facilities have Head Start seats, but are not Head Start facilities.

Four-Year-Old Enrollment by Facility Type



North Carolina Child Care Statistical Report; Forsyth Futures' Provider Survey; Family Services

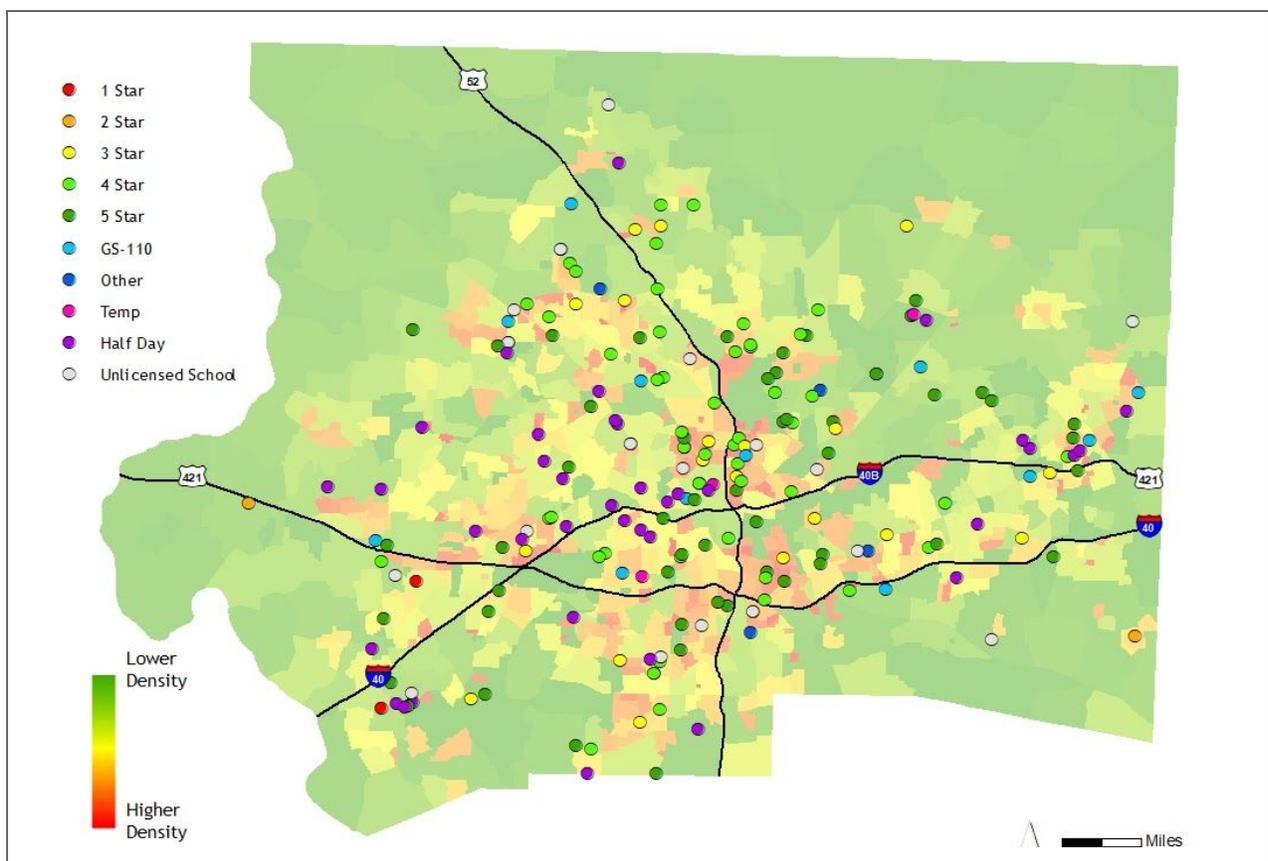
Category	Enrollment
School	947
Private Center	1125
Private Home	80
Head Start	150
Half Day	854

Location of Facilities and Enrollment

The maps in this section show the locations of facilities by licensing status and by the number of four-year-olds enrolled. The first map displays facility licensing status with the different statuses represented by different color circles.

Facilities by Licensing Status

Child Care and Pre-K/Preschool Facilities in Forsyth County by Licensing Status with Estimated Four-Year-Old Population Density (Family Child Care Homes are not included)

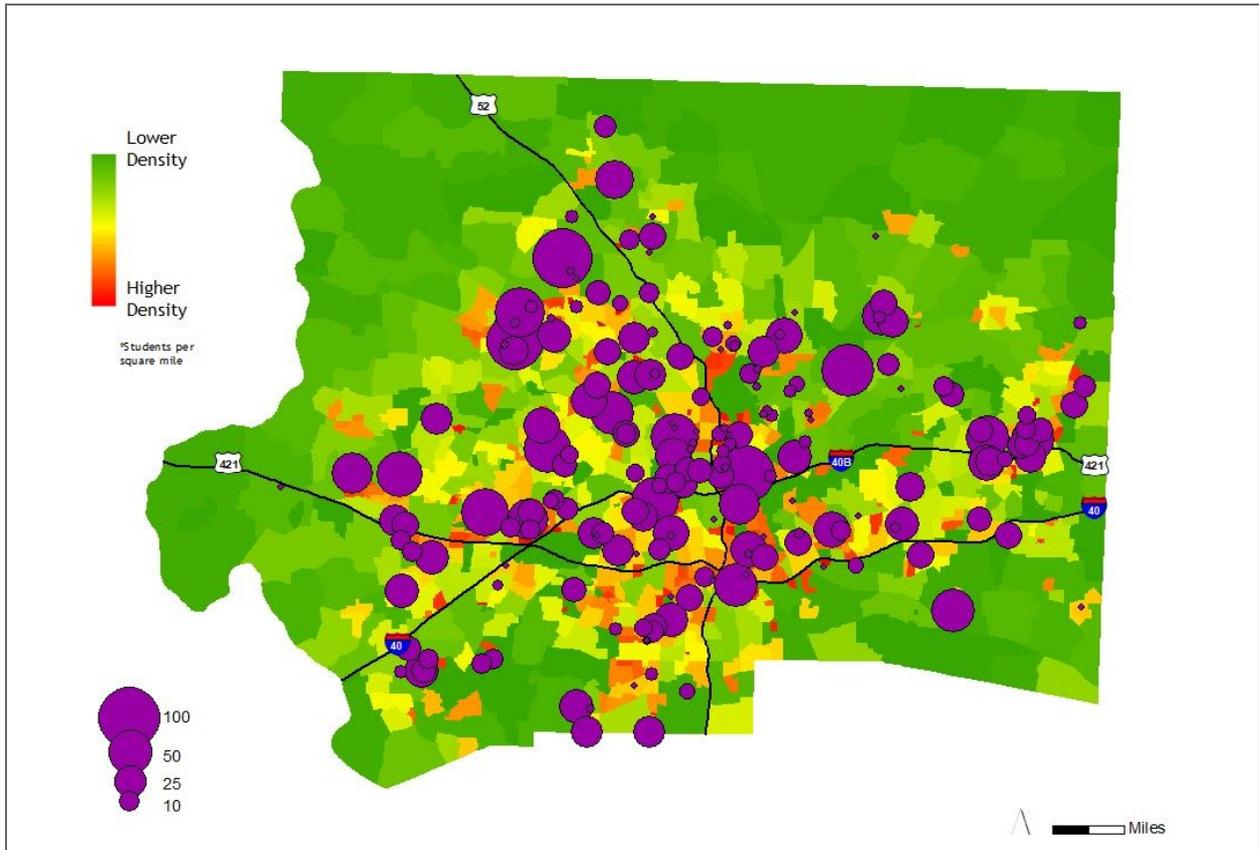


North Carolina Child Care Statistical Report; Forsyth Futures' Provider Survey; Family Services

The map below displays all facilities, with the exclusion of Family Child Care Homes, and the size of the circle is proportional to the number of four-year-old children enrolled at that facility.

Facilities by Four-Year-Old Enrollment

Facilities in Forsyth County by Four-Year-Old Enrollment with Estimated Four-Year-Old Population Density (Family Child Care Homes are not included)



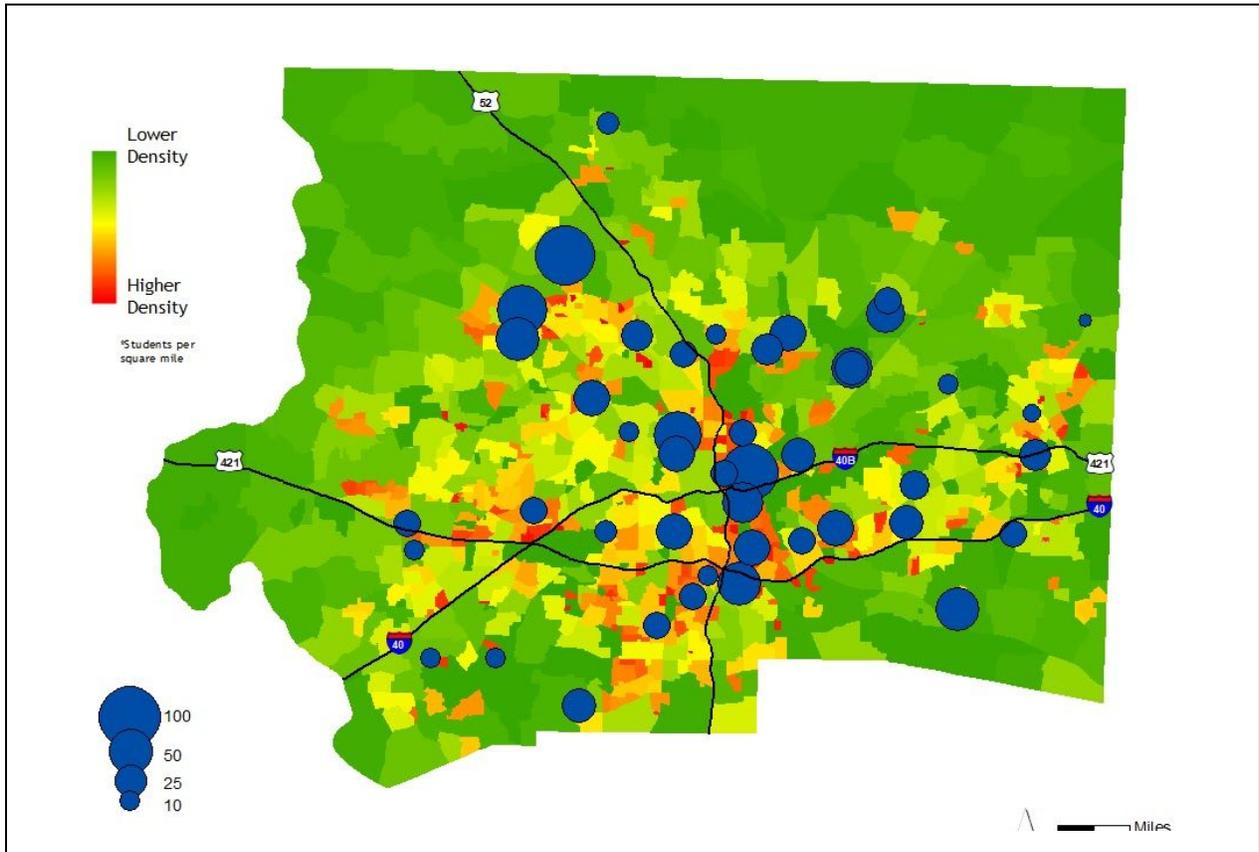
North Carolina Child Care Statistical Report

The map shows there is a dispersed pattern of facilities with few facilities in the rural areas of Forsyth County.

The map below displays facilities with publicly funded classrooms. The size of the circle is proportional to the number of four-year-old children enrolled at that facility.

Publicly Funded Facilities by Four-Year-Old Enrollment

Publicly Funded Facilities in Forsyth County by Four-Year-Old Enrollment and Estimated Four-Year-Old Population Density



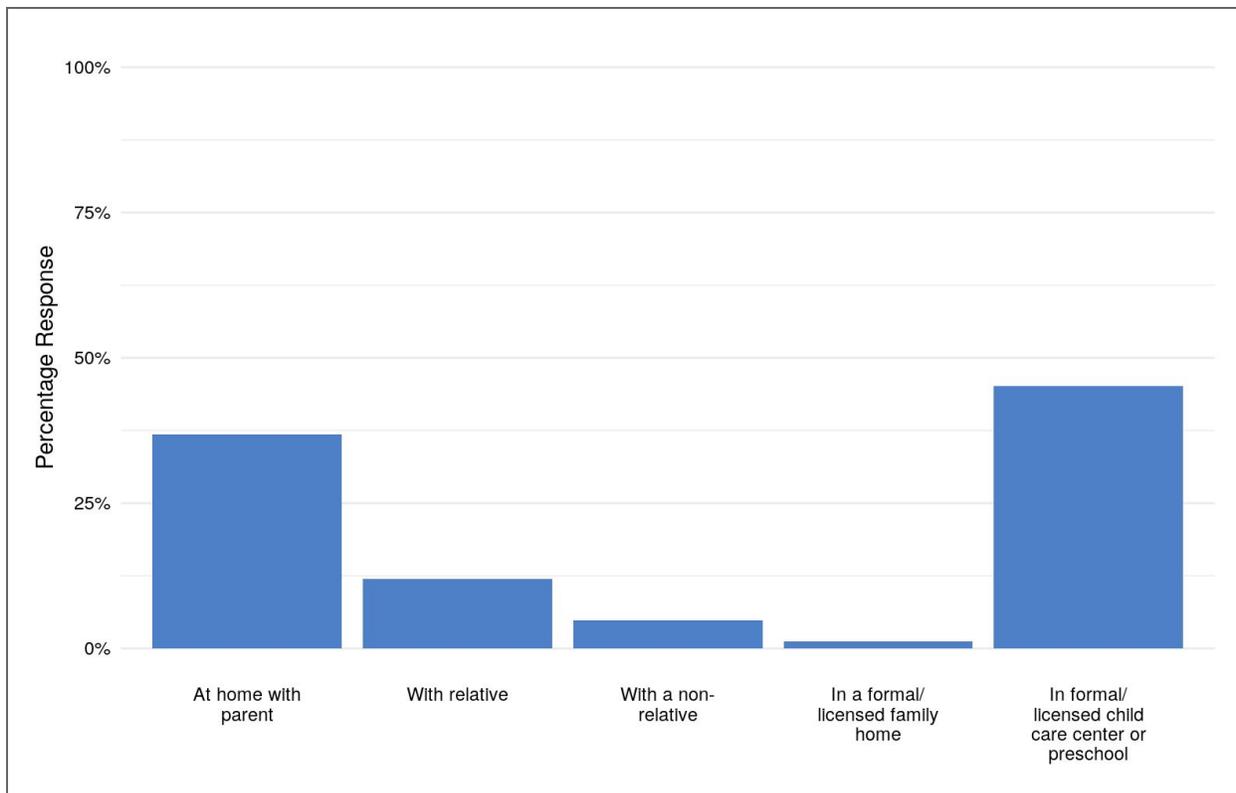
North Carolina Child Care Statistical Report; Family Services

The map shows there is a pretty well dispersed pattern of facilities with publicly funded classrooms across Forsyth County.

Care Arrangements of Four-Year-Old Children for the Majority of the Day

The previous section outlines the types of facilities that children enroll at, but it did not reveal any information on children not enrolled in Pre-K. This subsection looks to the Forsyth Futures Parent/Caregiver Survey to analyze how all four-year-olds spend their day, not just those in licensed care facilities. The survey asks caregivers to list “their current childcare arrangements for the majority of the day” for both four- and five-year-olds and the responses immediately below were modeled to produce Forsyth County estimates. For example, Forsyth Futures estimates that roughly 37% of all children in Forsyth County spend the majority of the day with a parent.

Care Arrangements for Four-Year-Old Children for the Majority of the Day



Forsyth Futures' Parent/Caregiver Survey

The following table shows the percentages along with population estimates for Forsyth County four-year-olds. The estimates were derived by multiplying the lower and upper ranges, technically the 95% confidence interval, of the percentages by the Forsyth County four-year-old population estimate of 4,660. The population ranges in the table represent a reasonable range that the true population estimate might fall within.

Child Care Arrangement	Percentage	Forsyth County Population Estimate
At home with parent	37%	1,425 to 2,011
With relative	12%	365 to 751
With a non-relative	5%	107 to 338
In a formal/licensed family home	1%	6 to 106
In formal/licensed child care center or preschool	45% ⁵	1,806 to 2,399

Forsyth Futures Parent Survey

Conclusions: Care Arrangements of Four-Year-Old Children

Approximately slightly less than half of Forsyth County’s 4,660 four-year-olds are in formal care arrangements for the majority of the day. These arrangements can be broken down into licensed and unlicensed facilities, and the best data is available for licensed facilities. Around 39% of Forsyth County’s four-year-olds attend licensed facilities, with over 95% of these children enrolled at centers. Further, the majority of attendance at centers occurs within those rated 5 stars.

⁵ As a technical note, the 46% of children in formal/licensed centers (45%) and formal/licensed family home care (1%) from the survey is a smaller reported percentage than the 49% in licensed care and unlicensed elementary schools reported earlier in this report. This difference can be attributed to the uncertainty surrounding the survey estimate. The 95% confidence interval for the 46% value is 40% to 52%. Also, all data sources have uncertainty that cannot be measured and this further contributes to the discrepancy.

Parent Satisfaction with Current Arrangements

This section looks at parent satisfaction with current care arrangements. The section includes data on: how parents are choosing current settings, parents' reported satisfaction, parents' implied satisfaction, and the reasons parents do not enroll their children in Pre-K.

How Parents are Choosing Settings

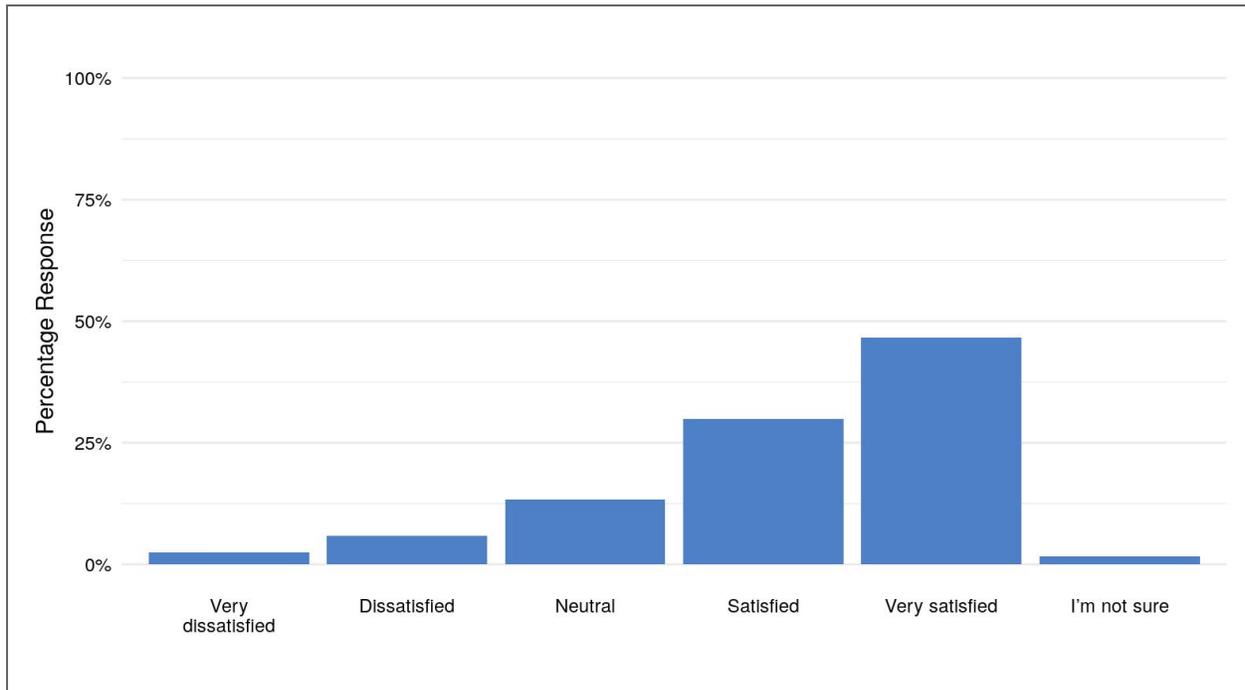
In interviews and focus groups with parents, the factors that parents described using to enroll their children in Pre-K/preschool includes:

- cost of the facility and deposit fees,
- location and proximity to either home or work,
- hours of operation and drop off policy,
- matching parent schedule - full day versus half day,
- ease of enrollment (paperwork and application process),
- classroom characteristics, like the size of the space, student-teacher ratio, diversity of student body, and presence of an assistant teacher,
- instructor level of education, teaching style, rapport with family, and transparency level of instructors background,
- diverse instruction styles including play, differentiated instruction, and instruction geared towards kindergarten readiness (socialization, skill building, structure day similar to kindergarten),
- verbal recommendation from friends or family, and
- testing requirements.

Parents' Reported Satisfaction

Parent Satisfaction with Pre-K/Preschool Arrangements

Percent of parents by level of satisfaction, from “Very dissatisfied” to “Very satisfied”, of their Pre-K/preschool arrangements for the majority of the day for their four-year old children.



Forsyth Futures' Parent/Caregiver Survey

In the Parent Survey, about 77% of parents described their satisfaction with Pre-K/preschool arrangements for their four-year old children as “Very satisfied” or “Satisfied”, and about 8% described it as “Dissatisfied” or “Very dissatisfied”. The remaining approximately 13% of parents described their satisfaction level as “Neutral”.

In interviews with parents, the types of things that parents described satisfaction with were the structure of the environment and teachers, teacher education level, relationships with the teachers, and progress reports and take home materials. Parents described the following as needing to be changed or improved: reducing cost barriers, reducing teacher turnover, fairly compensating teachers, reducing child disparities, providing more flexible hours, providing more balanced instruction, improving information sharing, more consistent schedule, assistance with enrollment, inclusion of families in activities, and improved curriculum and instruction.

See the sections on pages 57-63 for satisfaction of care arrangements by race/ethnicity, income, and special needs.

Conclusions: Parent Satisfaction with Current Arrangements

The majority of parents are very satisfied or satisfied with their four-year-old childrens' care arrangements, though they did identify aspects of care that they felt could be improved.

Costs of Current Pre-K Arrangements

This section examines the costs of Pre-K/preschool by using data from the North Carolina State University Market Rate Study and the Forsyth Futures Provider Survey. It then compares these rates to parents' views of affordability based on the Forsyth Futures Parent/Caregiver Survey. The section concludes by noting the large gap between rates facilities charge and parental perceptions of affordability.

Costs According to the Market Rate Survey

In 2017, the Center for Urban Affairs and Community Services (CUACS) at North Carolina State University conducted a market rate study for the Division of Child Development and Early Education, North Carolina Department of Health and Human Services. Tied into the study was a survey of licensed providers aimed at gathering information on their market rates. The tables below summarize the 2017 market rate study survey results and they represent full-time centers and homes for 98 Forsyth County facilities that responded to the survey.

Each table contains median and percentile amounts. The median, or 50th percentile, is the amount where half of all sites charge more than the given amount and half charge less. The same concept holds true for the 25th and 75th percentiles. For example, the 25th percentile is the rate at which 25% of all sites charge less than the amount and 75% charge more.

Licensed Center and Home Child Care Rates

Minimum	25%	50% (Median)	75%	Maximum
\$317	\$550	\$626	\$694	\$857

2017 NC State Market Rate Study

Licensed Center and Home Child Care Rates by Star Rating

Star Rating	Minimum	25%	50% (median)	75%	Maximum
1	\$317	\$458	\$609	\$651	\$792
3	\$468	\$559	\$566	\$661	\$762
4	\$480	\$538	\$599	\$674	\$783
5	\$522	\$602	\$682	\$736	\$857

2017 NC State Market Rate Study

*Two star centers were removed due to lack of data

Costs According to the Provider Survey

Forsyth Futures also collected information on market rates through the provider survey. The full- and part-time rates are shown below, along with rates for five-star and faith-based programs. There is not enough data to provide rates for one- through four- star facilities.

Full-time Pre-K/Preschool Rates from Provider Survey

Program Type	25%	50% (Median)	75%	Maximum
Full-time	\$395	\$675	\$764	\$940
Part-time	\$188	\$268	\$389	*
5 Star Rating	\$586	\$743	\$795	\$940
Faith-based	\$393	\$583	\$710	\$750

Forsyth Futures' Provider Survey

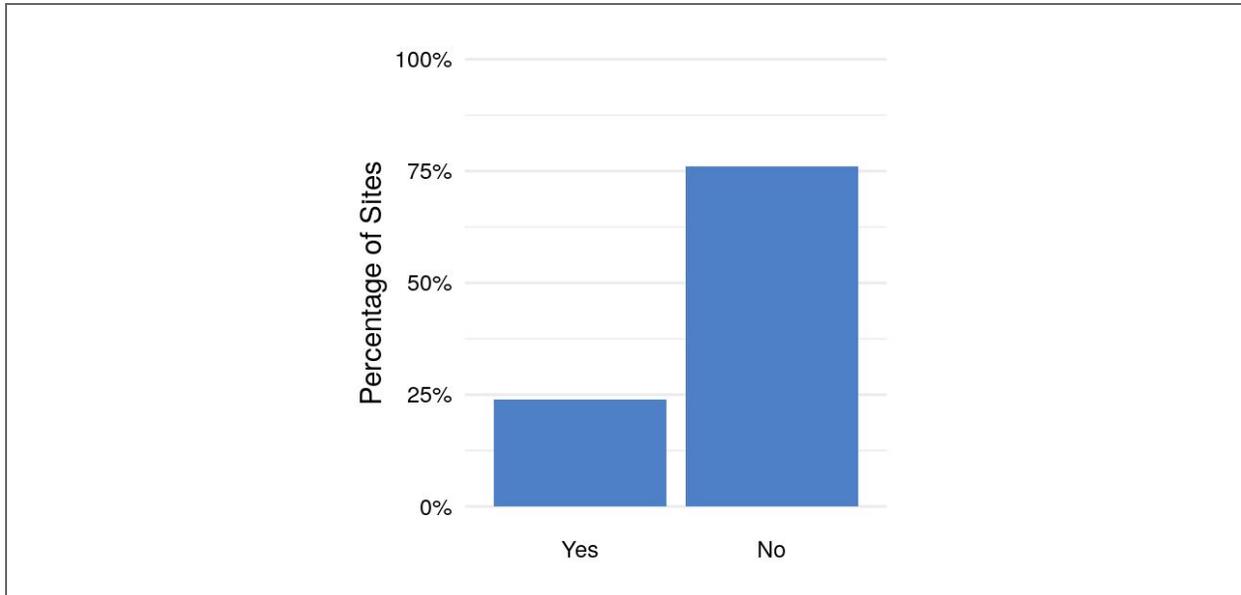
*Maximum monthly part-time values are not provided because some part-time sites listed weekly rates in the survey. Converting these weekly rates to monthly rates would have led to the maximum value. But, these weekly rates may not represent what someone will pay for child care arrangements with a set monthly rate.

Programs Providing Discounted Rates

Forsyth Futures also asked providers whether they offer discounted rates through the following question: “Do you have a sliding fee scale, discounted rates, scholarships, or other fees reduced for families with low incomes?” The responses are displayed below.

Percentage of Programs Providing Discounted Rates

Percentage of Programs Providing Discounted Rates or Other Reduced Fees to Low Income Families



Forsyth Futures' Provider Survey

Parent Perceptions of Affordability

This section assesses gaps between the costs described in the previous sections and what parents view as affordable. Forsyth Futures measured parents' views of Pre-K/preschool affordability through the following question on the parent/caregiver survey: "Please identify what you would consider an affordable monthly cost for Pre-K/preschool for 4-year-old children?" The table below represents modeled Forsyth County estimates of parents' answers, based on percentiles.

Parent Description of Affordable Pre-K/Preschool by Percentile

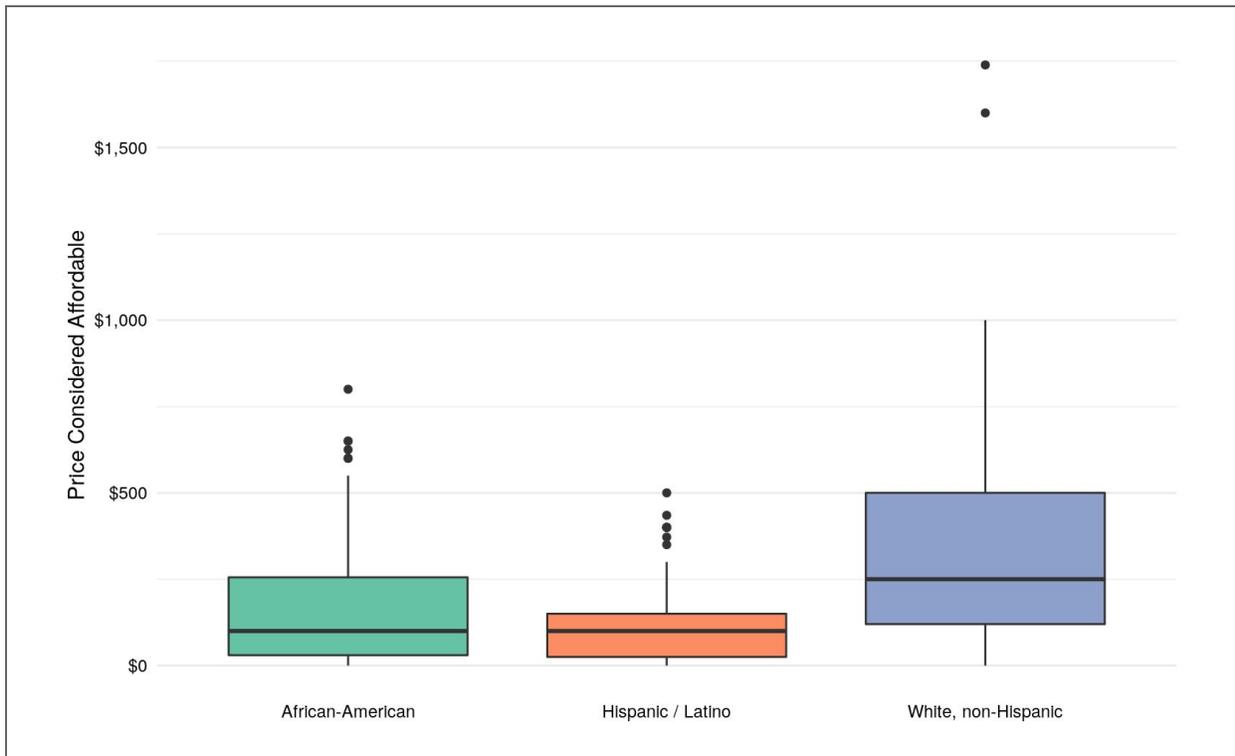
10%	25%	50% (Median)	75%	90%
\$0	\$80	\$200	\$400	\$500

Forsyth Futures' Parent/Caregiver Survey

Affordability By Race/Ethnicity

The next two sections look at descriptions of affordability by race / ethnicity and income. These numbers are not modeled to reflect county-level estimates - they represent the responses of parents who participated in the survey.

Parents' Views of Affordability by Race/Ethnicity



Forsyth Futures' Parent/Caregiver Survey

The boxplot shows that a minority of survey respondents generally viewed lower rates as more affordable. The boxplot compares perceptions of affordability by highlighting the median and 75th to 25th percentile ranges. The median is the thick black line in the middle of the box and the box itself represents the 75th to 25th percentiles.

	25%	50% (Median)	75%
African-American	\$30	\$100	\$256
Hispanic / Latino	\$25	\$100	\$150
White, non-Hispanic	\$120	\$250	\$500

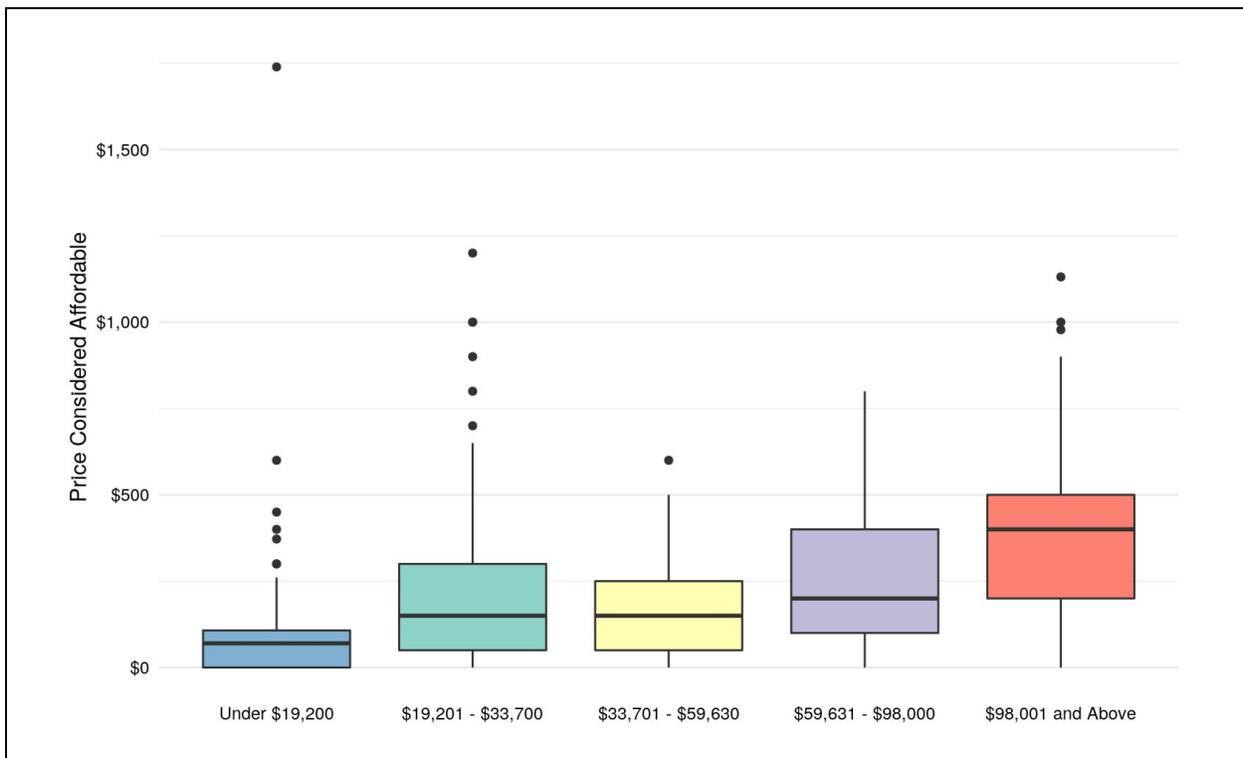
Affordability By Income

There are also differences in views of affordability by income. As shown below, respondents in the lowest and highest income bins had the lowest and highest views on affordability. Those in the middle three bins, however, had similar views on affordability.

Income bins reflect income quintiles for households in Forsyth County with children seven and under. Income quintiles are five income groupings where approximately 20% of households are in each grouping. Stated differently, the dollar amounts in the five groupings are created by devising five income groupings with an almost equal number of households in each grouping.

Parents' Views of Affordability by Race/Ethnicity

Rates Parents Identifies as Affordable by Race/Ethnicity



Forsyth Futures' Parent/Caregiver Survey

	25%	50% (Median)	75%
Under \$19,200	\$0	\$70	\$108
\$19,201 - \$33,700	\$50	\$150	\$300
\$33,701 - \$59,630	\$50	\$150	\$250
\$59,631 - \$98,000	\$100	\$200	\$400
\$98,001 and Above	\$200	\$400	\$500

Conclusions: Costs of Current Child Care Arrangements

There is general agreement in median and 75th percentile market rates between the NC market rate study and the Forsyth Futures Provider Survey. This holds for the overall full-time rates and five-star rates. Some providers in the Forsyth Futures survey, however, report low rates - under \$200 - and this leads to the provider survey having much lower 25th percentile rates. A reason for this could be the smaller sample size of the provider survey, where a handful of low values might be enough to drastically reduce the 25th percentile.

When comparing median market rates to parents' views on affordability, there is a large gap. According to the NC market rate study, the median full-time market rate was \$626, while the median amount parents viewed as affordable was only \$200. In fact, only 6% of parents in the survey said that they viewed a cost over \$626 as affordable.

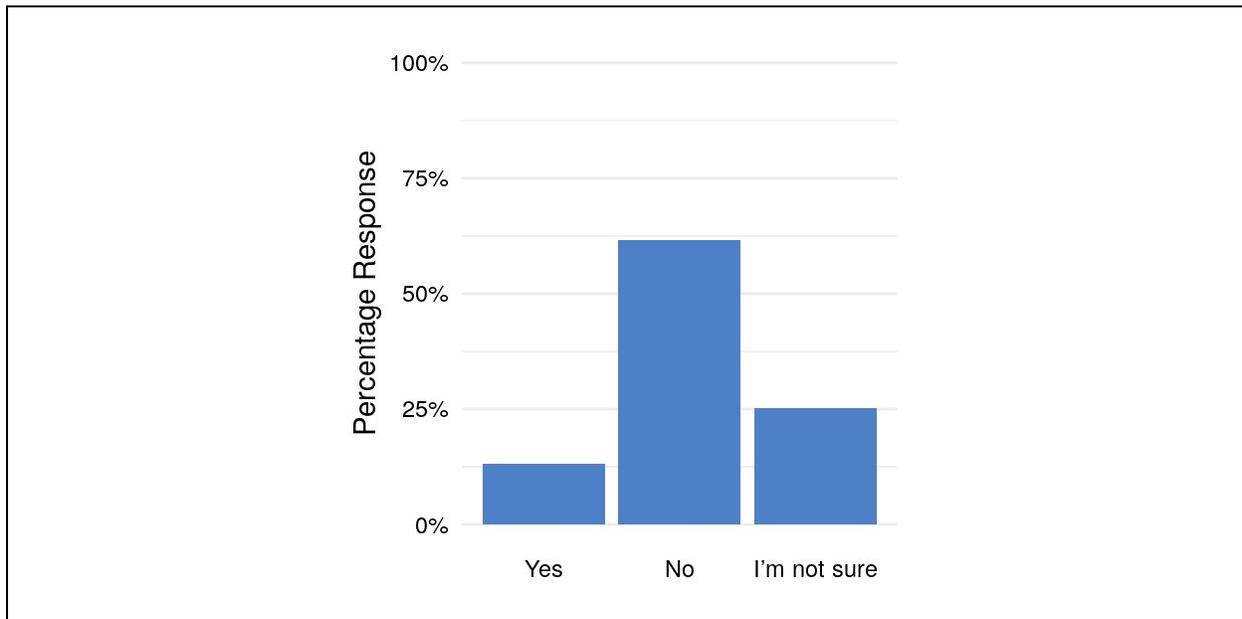
Availability of Care Arrangements for 4-Year Olds

Perception of Availability of Pre-K Slots

This section looks at parent and provider perceptions of the general availability of Pre-K slots as well as high-quality Pre-K slots.

Parent Perception about Adequate Pre-K/Preschool Slots

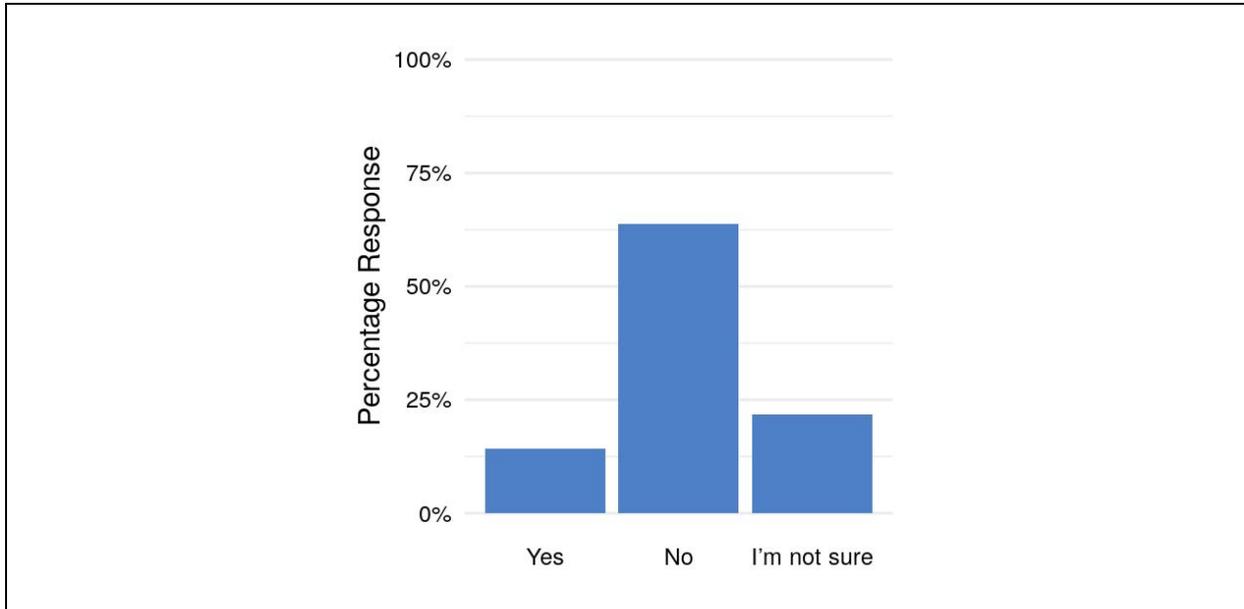
Percent of parents on whether or not they think there are enough Pre-K/preschool slots for four-year old children.



Forsyth Futures' Parent/Caregiver Survey

In the Parent Survey, about 61% of parents thought there were not enough Pre-K/preschool slots for four-year olds, while 13% thought there were enough, and 25% were not sure.

Parent Perception about Adequate High-Quality Pre-K/Preschool Slots



Forsyth Futures' Parent/Caregiver Survey

In the Parent Survey, about 64% of parents thought there were not enough Pre-K/preschool slots for four-year olds, while 14% thought there were enough, and 22% were not sure.

In interviews and focus groups with parents, there was a high level of agreement that there are not enough Pre-K/preschool slots and facilities. Some of the perceived reasons from parents for limited slots included cost barriers, too few facilities, diverse schedule offerings such as half day, high facility operation costs and onerous state regulations, facilities closing unexpectedly. There was also a shared agreement that there is a lot of existing demand for more slots.

Another major theme from the interviews and focus groups with parents was that there was not nearly enough affordable care, and that for existing affordable care, there needs to be a focus on making it high quality affordable care. Throughout much of the conversation on affordability, there was the theme that higher quality is associated with higher costs, and affordable options were sometimes questioned on quality.

In interviews with providers, providers generally indicated that there were a lot of children on the NC Pre-K waitlist and that it wasn't difficult to fill those slots. Unlicensed providers reported a mix of having trouble filling slots, only having a few slots, and having waitlists. Other provider responses include:

- some reporting they currently see enough supply to fill demand,
- increasing family, friend, and neighbor care, which is creating a net decrease in demand for Pre-K slots, and
- Some felt that the stigma of publicly funded or free programs would result in subsidized Pre-K slots being viewed as lower quality, decreasing the demand.

Conclusions: Perception of Availability of Pre-K Slots

Parents generally do not perceive there being enough slots for four-year-olds, especially affordable slots that are also high quality, and different providers reported different experiences and perspectives about the level of supply and demand for four-year-old slots.

Facility Capacity

This section begins by examining facility capacity in Forsyth County. Facility capacity is looked at through the lens of both percentage capacity and raw number of slots. The section then takes the capacity numbers and estimates whether Forsyth County can potentially meet Pre-K demand if costs were not a factor for parents.

Capacity of all Licensed Facilities

The North Carolina Division of Child Development and Early Education’s (NCDCDEE) child care statistical reports contain enrollment and capacity information for all licensed facilities within Forsyth County. The capacity information, however, is aggregated up to the total number of children the facility is licensed to enroll. They do not show how many four-year-olds a facility can enroll.

However, a general proxy for ability to enroll four-year-olds can be captured by looking at overall capacity. The average percent of capacity for all of Forsyth County was 64% between August 2018 and July 2019. This represents the monthly average of the total number of students in all ages enrolled in licensed centers divided by the total licensed capacity.

But, facilities have varying percentages of capacity and examining the distribution of these rates can be informative. The percentage figures below represent percentiles calculated from each licensed care facility’s average monthly percentage of capacity from August 2018 and July 2019. For example, The median percentage of capacity is 67%, meaning that half of all licensed centers had average monthly percentage of capacity below 67% and half had amounts above 67%.

Percentage of Capacity of Licensed Centers in Forsyth County

25th percentile	50th percentile (Median)	75th percentile
55%	67%	88%

North Carolina Child Care Statistical Report

Percentage of Capacity by Star Rating

The table below shows the average county-wide percentage of capacity by star rating. As shown, there is a general consistency in percentage of capacity between star ratings, except for one star facilities which lag in percentage of capacity behind three, four, and five star facilities.

Average Percentage of Capacity per Star Rating

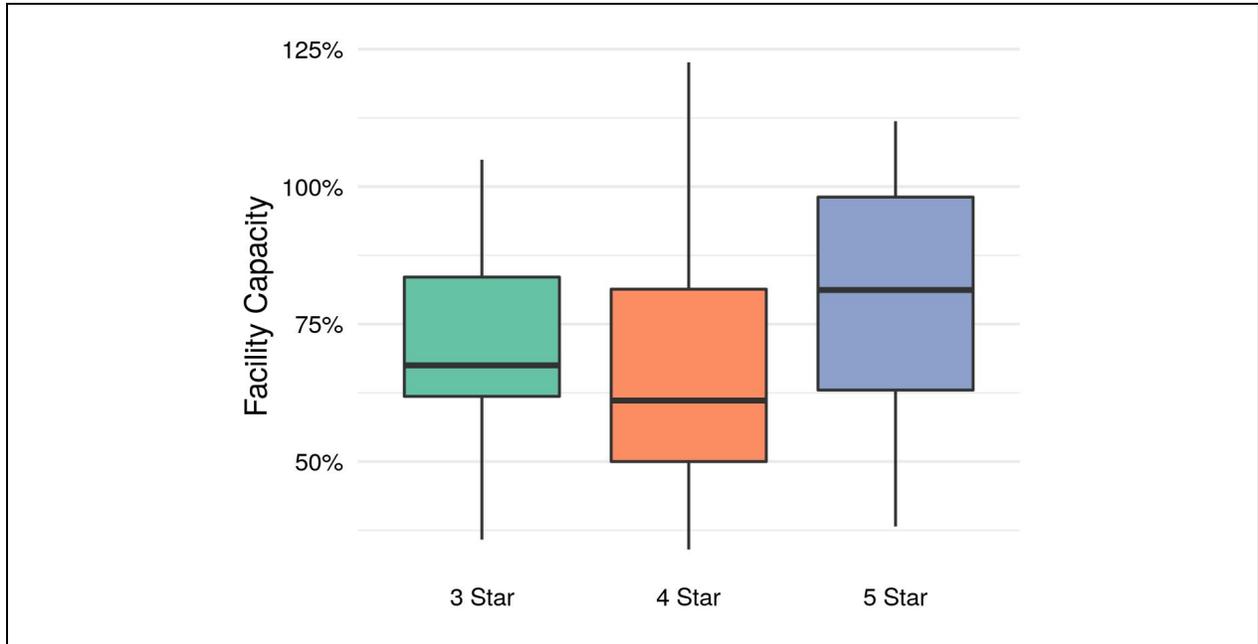
Star Rating	Average Percentage of Capacity
1 Star	55%
3 Star	71%
4 Star	66%
5 Star	67%

North Carolina Child Care Statistical Report
**2 star facilities are omitted due to lack of data*

The above table showed the county-wide average. As before, however, it is helpful to also examine percentage of capacity rates at the facility level.

The boxplot below compares percentiles of facility percentage capacity levels by star rating. The median is the thick black line in the middle of the boxplot and the box itself represents the 75th to 25th percentiles. As noted earlier, the median means that half of all facilities have percentage of capacities below the given amount and half have percentage of capacities above the amount. Only data on three, four, and five star facilities are presented due to an insufficient number of one and two star facilities.

Percentage of Capacity of Licensed Centers by Star Rating



North Carolina Child Care Statistical Report

Percentage Capacity of Licensed Centers in Forsyth County by Star Rating

Star Rating	25th percentile	50th percentile (Median)	75th percentile
3 Star	61%	68%	84%
4 Star	50%	61%	81%
5 Star	63%	81%	98%

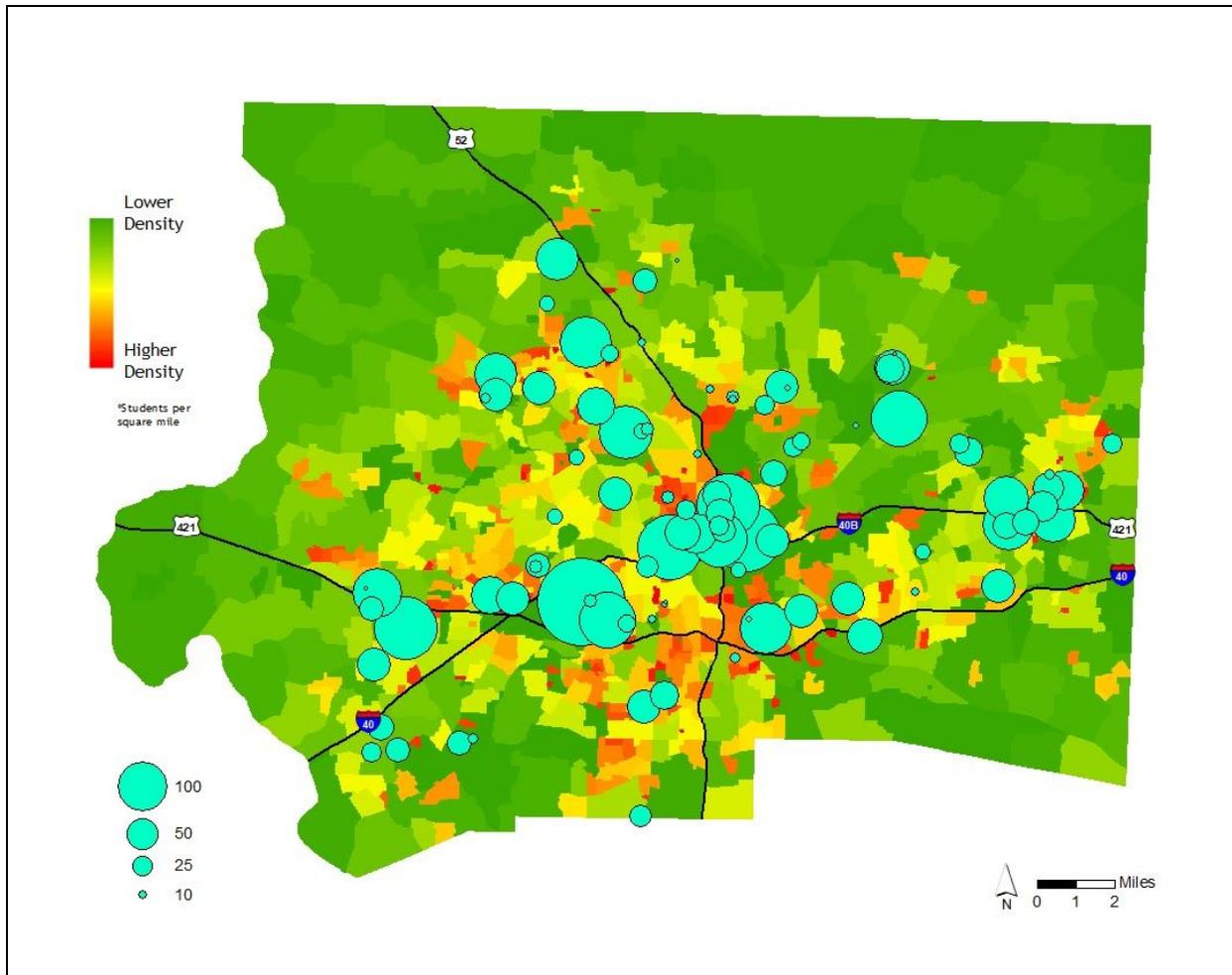
North Carolina Child Care Statistical Report

Looking closer at the capacity breakdowns by star rating, five star facilities have both a higher median and 75th percentile. Focusing on the median, half of all five star facilities have capacities at or above 81%. Additionally, a conclusion from having a 75th percentile of 98% is that 25% of all five star facilities have capacities at 98% or higher.

Available Facility Capacity by Location

The map below shows the average available capacity of all licensed centers in Forsyth County from August 2018 to July 2019. It includes available space for all ages, not just four-year-olds, so the information in the map is very likely an overestimate of available capacity for four-year olds. But, it provides a start on available capacity in the system. The map shows large capacity sites in the center of Winston-Salem, near Clemmons, and near Kernersville.

Available Capacity of Licensed Centers



North Carolina Child Care Statistical Report

Facility Capacity According to the Provider Survey

Forsyth Futures also gathered capacity information in its provider survey by asking providers their current four-year-old enrollment and target enrollment. Due to a limited number of usable responses to this question, Forsyth Futures researchers are unable to create exact county-wide numbers of enrollment and open slots. But, reasonable ranges for county-level enrollment, target, and open slots are provided in the table below. They represent ranges that the true aggregate Forsyth County value most likely falls within and represent licensed childcare centers, GS110 facilities, half-day facilities, and school system sites.

Enrollment and Facility Capacity

Category	Range
Total Enrollment	2,020 to 2,930
Total Target Enrollment	2,700 to 3,860
Open Slots	560 to 1,100

Forsyth Futures' Provider Survey

Capacity to Expand Enrollment if Costs Were Not a Factor

Given the current enrollment totals and targets, one can ask whether Forsyth County has enough Pre-K seats to fill demand if costs are excluded from the demand calculus parents face. The Forsyth Futures' parents survey helps understand demand when costs are excluded as it found that 90% of all parents with children younger than four said that they would be very likely to send their children to Pre-K if costs were not a factor.

The lower and upper uncertainty ranges of this percentage, 87% to 93%, can be multiplied by the 2018 number of four-year-olds in Forsyth County, 4,660, to give a rough estimate of future demand if costs were not a factor.⁶ This range comes to 4,090 to 4,360. Again, it merely provides a rough estimate of the number of four-year-olds in Forsyth County who might want to enroll in Pre-K if costs were not a factor.

⁶The 2018 four-year-old population is used despite the forward-looking nature of the demand projection. This number is used because child population projections from the North Carolina Office of State Budget & Management show stability in Forsyth County five-year-old population projections over the next five years, so no adjustments for population changes are needed.

North Carolina Office of State Budget and Management. (n.d.). Retrieved December 20, 2019, from <https://www.osbm.nc.gov/demog/county-projections>.

Applying this estimated range to current capacity reveals the potential need for more seats. The provider survey showed an estimated target enrollment between 2,700 and 3,860. Subtracting this from the demand range of 4,090 to 4,360 creates a potential undersupply of between 230 and 1,660 four-year-old seats in a Pre-K environment where costs are not a factor for parents.

Conclusions: Facility Capacity

Childcare facilities in Forsyth County do have some excess capacity. Licensed centers are operating at roughly 64% capacity for all ages, although there is no way of knowing to what degree they can add more four-year-olds. Facilities from the provider survey, meanwhile, have between roughly 560 to 1,110 open slots for four-year-olds.

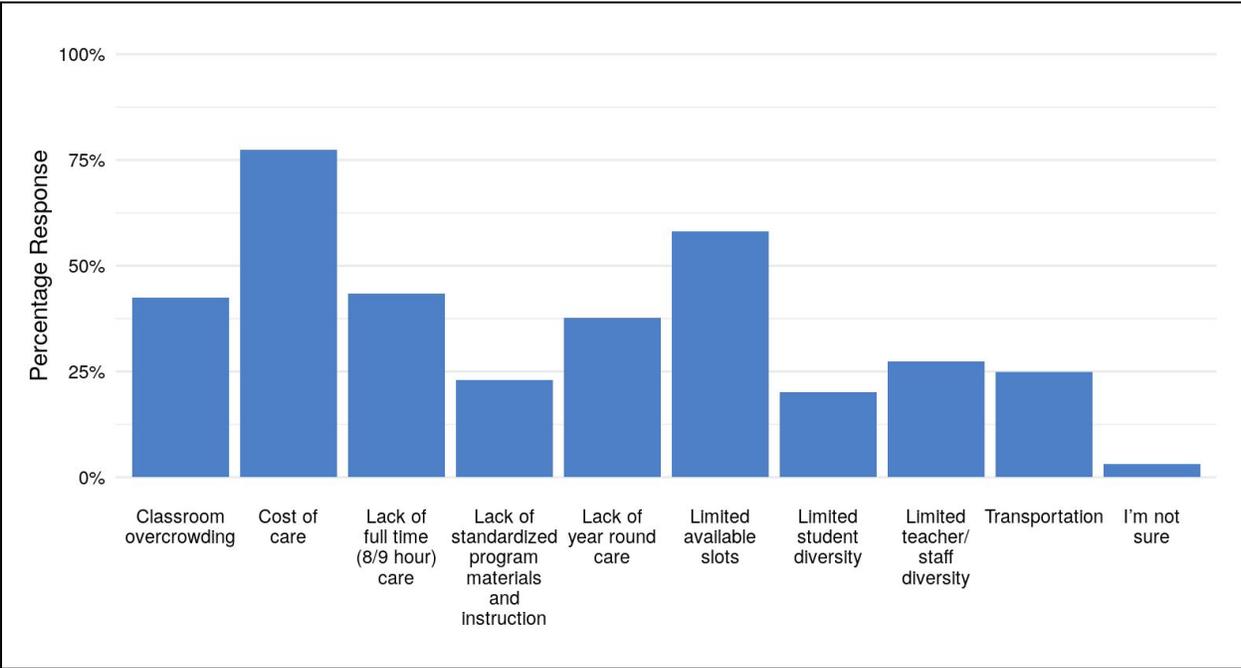
Despite this extra capacity, the county could struggle to meet demand if costs were no longer a factor for parents. An estimated 90% of parents in the county said they would be very likely to enroll their child in Pre-K if costs were not a factor and this situation could create an undersupply of seats ranging from 230 to 1,660. Forsyth Futures' analysts' best estimate is that this undersupply around 1,000 slots, but margin of error on this estimate is significant and should be noted.

Equity in Care Arrangements

Barriers to Enrollment

This section looks at parent reported barriers to enrolling in Pre-K.

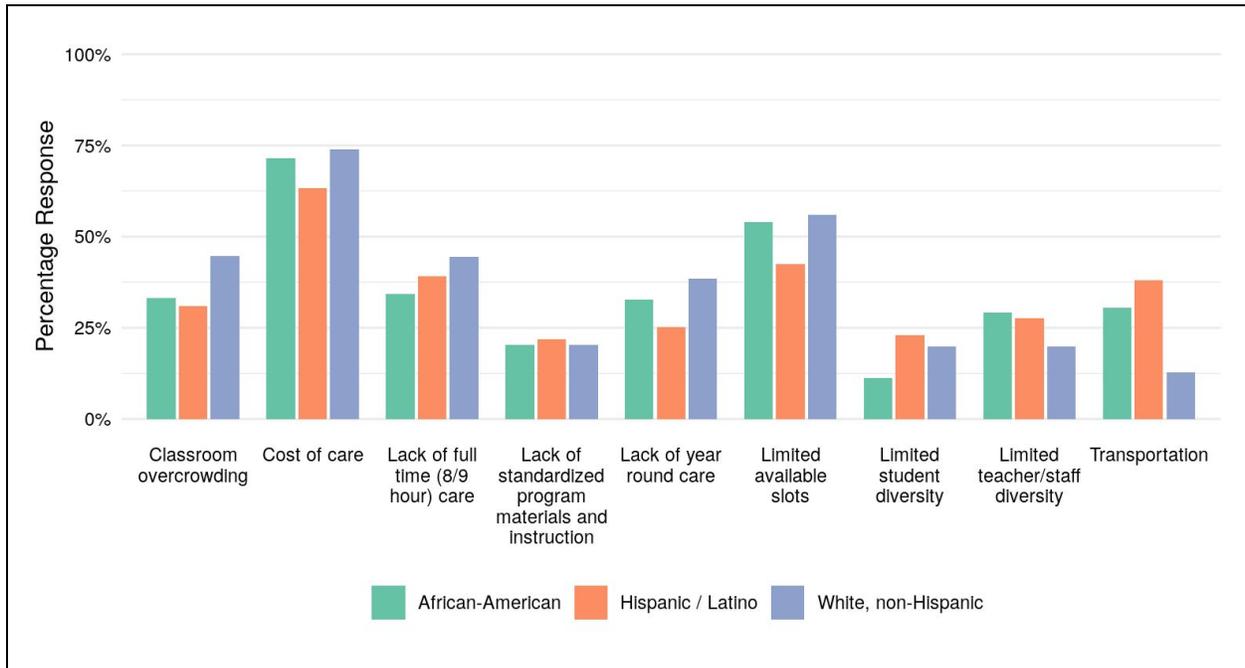
Factors that Might Prevent Parents from Enrolling their Children in Pre-K/Preschool



Forsyth Futures' Parent/Caregiver Survey

In the Parent Survey, the most frequently reported factors that parents might not enroll in Pre-K/preschool were cost of care (77%), limited available slots (58%), lack of full time or 8/9 hour care (43%), classroom overcrowding (42%), and lack of year round care (38%).

Factors that Might Prevent Parents from Enrolling their Child in Pre-K/Preschool by Race/Ethnicity



Forsyth Futures' Parent/Caregiver Survey

In the Parent Survey, the largest differences between subgroups on factors that might prevent parents from enrolling their child in Pre-K were seen in classroom overcrowding, lack of year round care, limited available slots, and transportation (see the graph above for the differences).

Factors that Might Prevent Parents from Enrolling their Child in Pre-K/Preschool by Geography



Forsyth Futures' Parent/Caregiver Survey

According to the Parent Survey,

- Classroom overcrowding is an important factor that parents on the western side of the county take into account when sending their child to a Pre-K/preschool program. In any given ZIP code, at least 30% of parents consider overcrowding as a preventing factor.
- The majority of parents in every respective ZIP code mark the cost of care as a factor that would prevent them from enrolling their child in a program.
- Parents needing full time (8/9 hour) care are spread throughout Forsyth County and there is no clear pattern geographically.
- Teacher/Staff Diversity is not an overly preventative factor for parents. Between 16% and 35% of parents for respective ZIP codes consider this a factor.
- Standardization of program materials and instruction is also not an overly preventative factor. At most, 31% of parents located in the Kernersville area say lack of standardization would prevent them from enrolling their child in a program.
- Parents spread around the county mention lack of year-round care as a factor that would prevent them from enrolling their child. There is not one area of concentration rather,
- Parents on the eastern side of the county note that limited available slots is what prevents them from enrolling their child in a Pre-K/preschool program. Generally, this is an important note for responding parents all throughout Forsyth County.
- Limited student diversity is a preventative factor for 42% of responding parents located in 27045 which is located in north central Forsyth County. Other than this area, this is not a largely preventative factor for parents.
- Transportation is an important consideration for parents in ZIP codes located in North Central Forsyth County; nearly 40% of responding parents living in 27105 and 27045, respectively, say that transportation could prevent them from enrolling in a Pre-K/preschool program.

In interviews and focus groups with parents, the barriers to enrollment that were described were affordability, limited classroom size, lack of classroom diversity, limited slots and a history of closing facilities, lack of facility diversity by geography, convenience challenges (such as hours of operation, location, and parking/drop off), limited communication between teachers and parents, concerns with instruction, safety, and attention to each child, the enrollment process, and lack of food.

Transportation was a major barrier that was described. Parent suggestions to remedy this barrier included improving proximity of facilities to neighborhoods and communities, and providing busing options for families who need the service. Relating to busing, there were some concerns about younger children riding the bus and safety issues.

Parents also expressed concerns when utilizing Pre-K, which include availability for year round care, program location and stigma associated with schools located in low-performing geographies, pressure on children created by kindergarten readiness standards and the anxiety that creates for children, classroom diversity and the perception that children are separated by income, limited availability of sliding fee options, non-standardized curriculum, and positive relationships between the teacher and children. Relationships were described as important to establish how children frame their beliefs about school and teachers and the lasting impact this can have across a child's life.

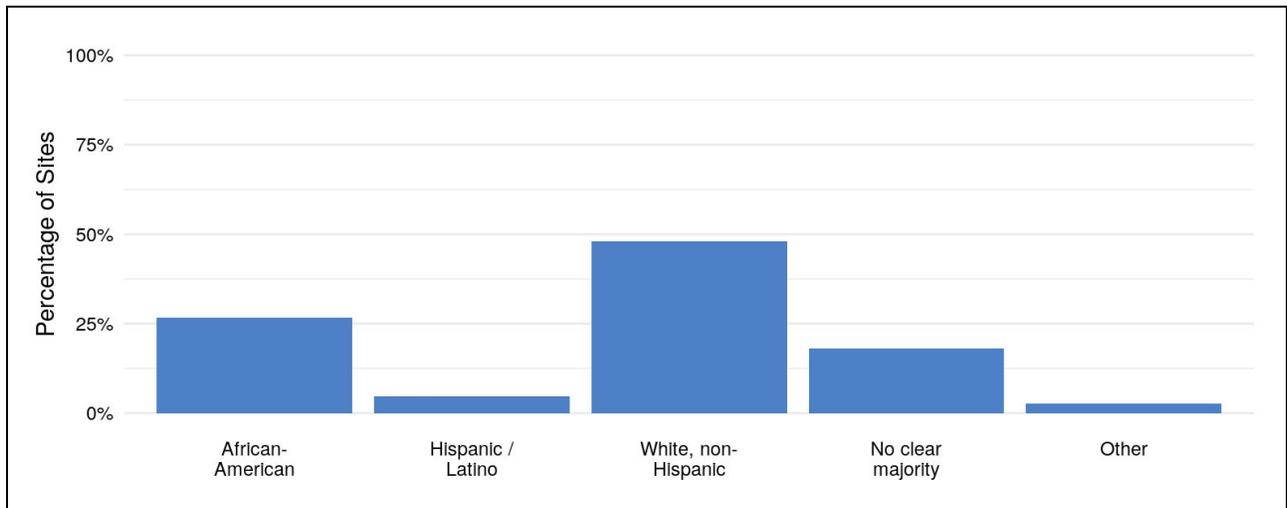
Care Arrangements by Race/Ethnicity

This section first looks at the racial / ethnic composition of children in care and then turns to examining parental care arrangements by race / ethnicity. It finishes by evaluating whether parents are satisfied with these care arrangements.

Racial / Ethnic Composition of Providers

Forsyth Futures collected information on the racial / ethnic composition of children in care through the following question on the provider survey: “How would the majority of 4-year-olds in your program describe their race or ethnicity?”

Majority Race/Ethnicity of Four-Year-Olds at Provider Sites



Forsyth Futures' Provider Survey

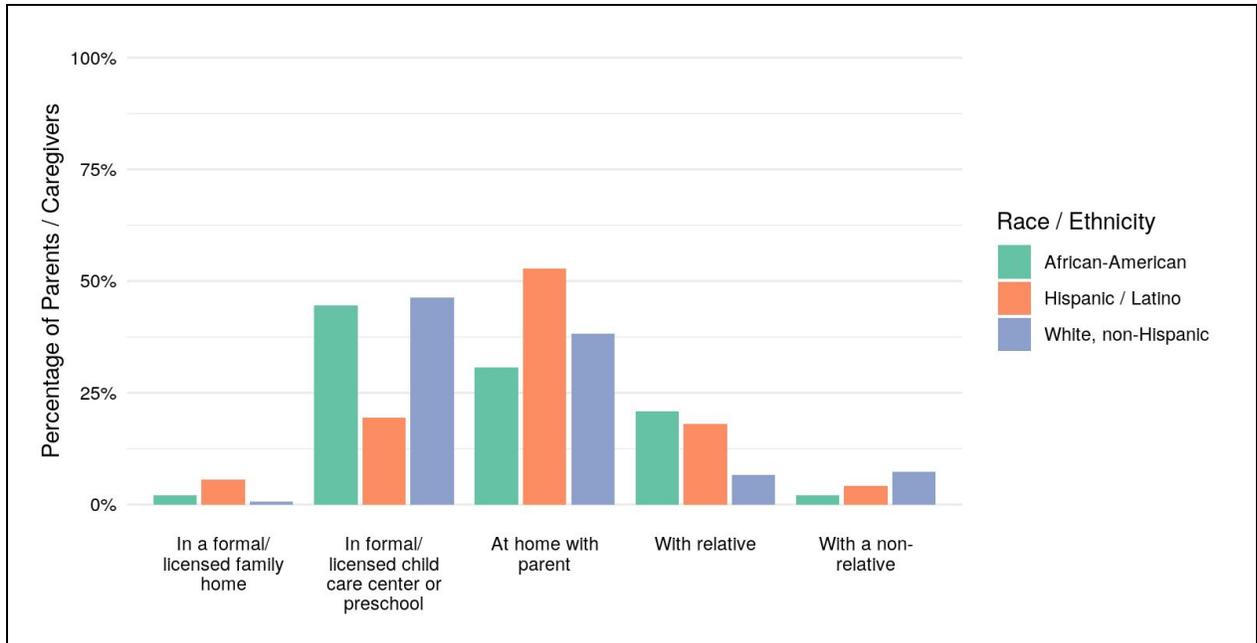
Responses show that slightly less than half of all respondent sites (48%) reported white, non-Hispanic as their majority race / ethnicity. Thus, less than half of the respondents have the county's majority race for four-year-olds as their clear majority race. For sake of comparison, 43% of all four-year-olds in Forsyth County are white, non-Hispanic. Also of note is that nearly 20% of respondents reported that their facilities have no clear majority, pointing to a fair number of racially diverse facilities.

Parental Care Arrangements by Race/Ethnicity

Moving from providers to parents, this subsection presents information on the care arrangements of families based on their race / ethnicity. The information was gathered from the Forsyth Futures Parent/Caregiver Survey, which asked parents to list each child’s “current childcare arrangement for the majority of the day.” The survey responses combine four- and five-year olds not yet in kindergarten.

Care Arrangements of Children by Race/Ethnicity

Care Arrangements of Four and Five-Year-Olds for the Majority of the Day by Race/Ethnicity



Forsyth Futures' Parent/Caregiver Survey

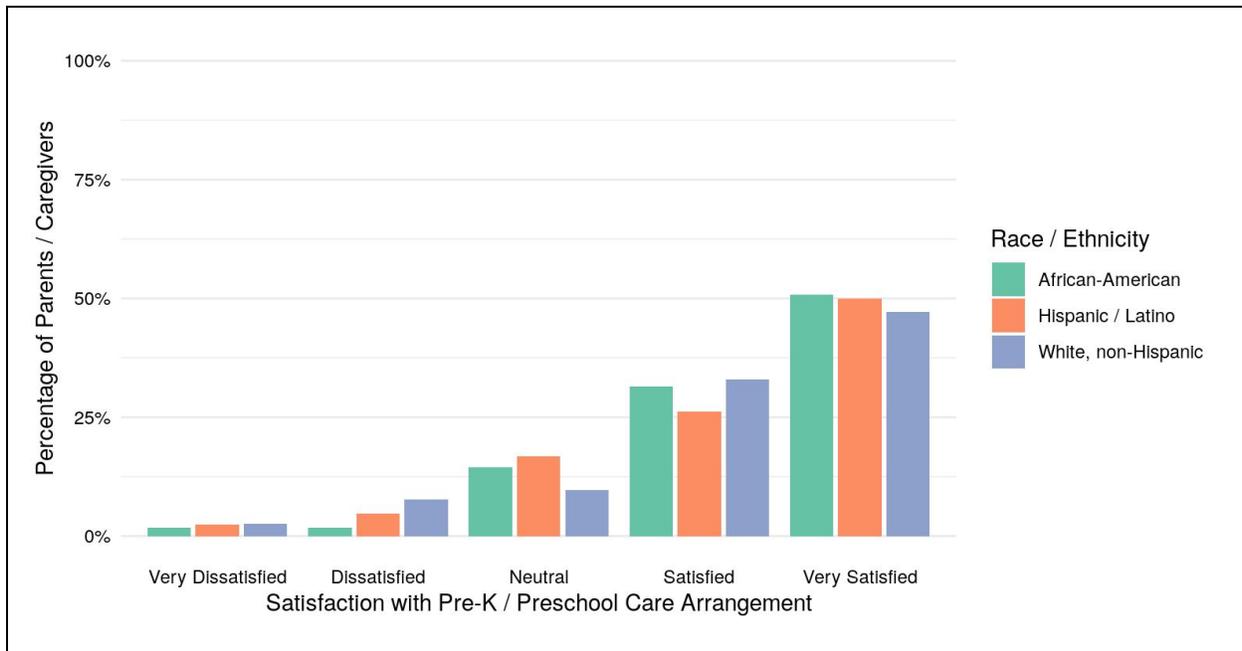
As the results in the visualization show, there are differences in care arrangements by race / ethnicity. Specifically, Hispanic / Latino respondents were less likely to have four and five-year-olds in formal / licensed child care centers (20%) and more likely to have children at home with parents (52%) compared to African Americans (45% and 31%) or white, non-Hispanics (46% and 38%).

Satisfaction with Care Arrangements by Race/Ethnicity

Now that there is an understanding of where children spend the majority of their day, broken down by race / ethnicity, attention can be turned to parents' satisfaction with these arrangements. Parents' satisfaction was gauged on the parent survey through the following question: "If your child is 4 years old or older, how satisfied are/were you with their Pre-K/preschool care arrangements for the majority of the day during their 4-year-old year?"

Satisfaction with Care Arrangements for Children by Race/Ethnicity

Satisfaction with Care Arrangements for the Majority of the Day by Race/Ethnicity



Forsyth Futures' Parent/Caregiver Survey

As the visualization shows, there is little difference in satisfaction between races / ethnicities. And the differences that do appear are slight and could simply be the product of chance. Practically speaking, African American, Hispanic / Latino, and white, non-hispanic survey respondents reported similar levels of satisfaction with their care arrangements.

Conclusions: Care Arrangements by Race/Ethnicity

Forsyth County's Pre-K facilities have wide-ranging racial compositions as less than half of the survey respondents reported white, non-Hispanic as the majority race / ethnicity at their facility. Further, many respondent sites had racially diverse facilities as 20% noted that there was no clear majority race / ethnicity. Finally, although Hispanic / Latino survey respondents reported a smaller percentage of children in formal care arrangements, all races / ethnicities had similar levels of satisfaction with their care arrangements.

Care Arrangements by Income

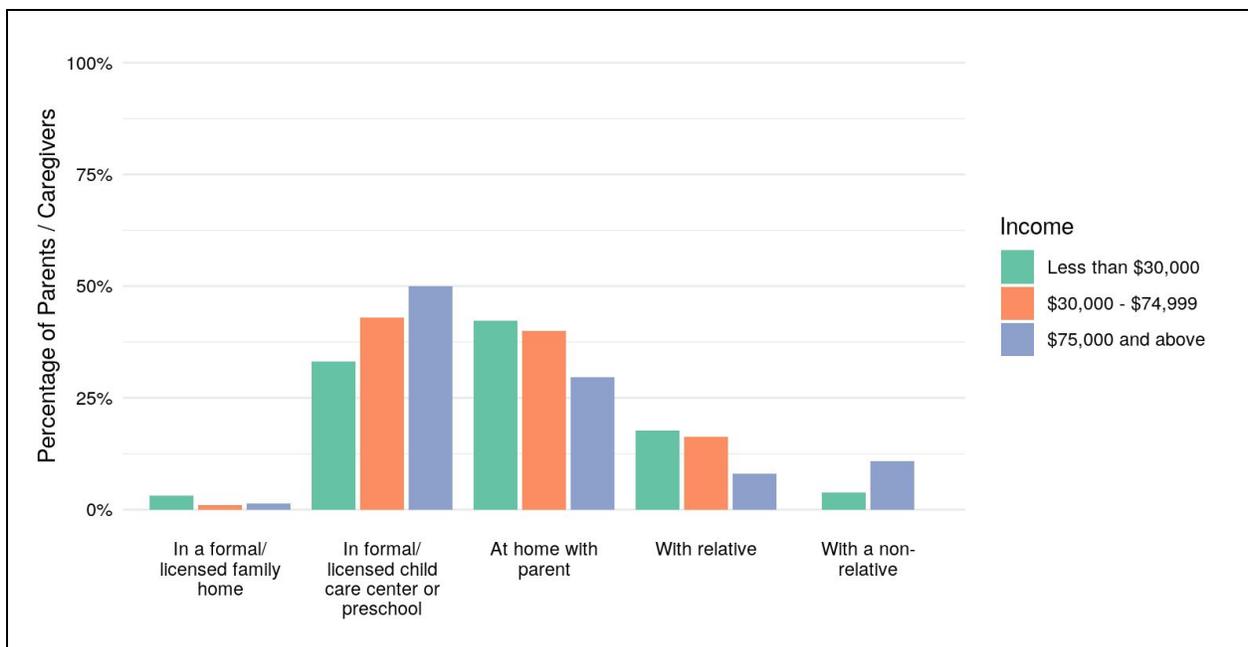
This section examines children’s care arrangements by income. It looks at where children spend the majority of their day by income and then notes whether parents are satisfied with these arrangements.

Parental Care Arrangements by Income

This subsection examines whether there are differences in care arrangements by income. The information was gathered from the Forsyth Futures Parent/Caregiver Survey, which asked parents to list each child’s “current childcare arrangement for the majority of the day.” The survey responses combine four and five-year olds not yet in kindergarten and incomes of respondents were grouped into three bins.

Care Arrangements of Children by Income

Care Arrangements of Four and Five-Year-Olds for the Majority of the Day by Income



Forsyth Futures’ Parent/Caregiver Survey

There is a slight relationship between income and care arrangements among parents who responded to the survey. Parents in the top income group were the most likely to have children in a formal / licensed care center (50%), while those in the bottom income group were the least likely (33%). The situation reverses regarding children at home with parents. Those in the bottom income group are the most likely to have children at home with parents (42%) and those in the top income group are the least likely (30%).

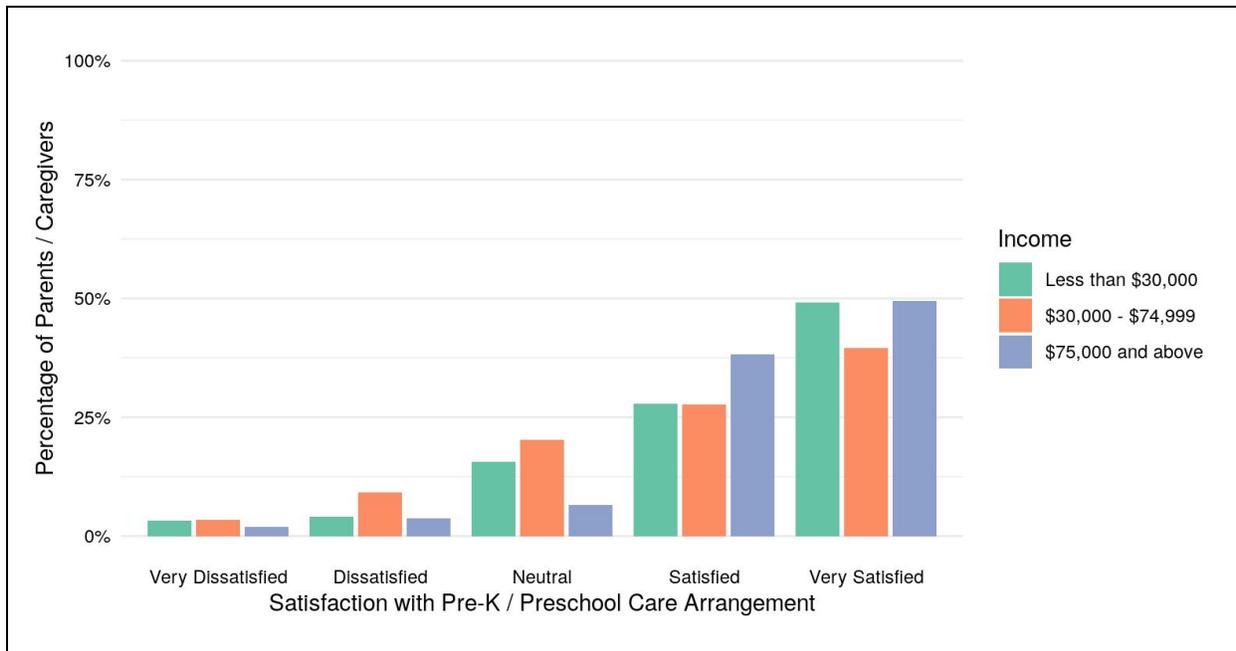
The reasons for this relationship are complex and multi-faceted. Affordability, no doubt, is a key driver. Low income families lacking access to public assistance for Pre-K often find Pre-K too expensive. Other factors might include a lack of access, parents’ employment, and willingness to use Pre-K.

Satisfaction with Care Arrangements by Income

Now that there is an understanding of where children spend the majority of their day, broken down by income, attention can be turned to parents' satisfaction with these arrangements. Parents' satisfaction was gauged on the parent survey through the following question: "If your child is 4 years old or older, how satisfied are/were you with their Pre-K/preschool care arrangements for the majority of the day during their 4-year-old year?"

Satisfaction with Care Arrangements of Children by Income

Satisfaction with Care Arrangements for the Majority of the Day by Income



Forsyth Futures' Parent/Caregiver Survey

As shown above, there are no clear overall patterns in the relationship between income and satisfaction with care arrangements. Certainly, there are some sporadic differences in groups, but no real patterns emerge.

Conclusions: Care Arrangements by Income

Higher income respondents to the parent survey were more likely to enroll their children into formal / licensed child care centers and lower income respondents were more likely to stay at home with their children. But, all income groups reported similar levels of satisfaction with their care arrangements.

Care Arrangements for Children with Special Needs

This section explores child care arrangements for children with special needs. It looks at where children with special needs spend the majority of their day and examines parent's satisfaction with these arrangements. The section concludes by presenting information on the willingness of providers to meet the needs of children with special needs.

Many children with special needs receive funding for Pre-K through IDEA Part B, Section 619. This federally funded program allows children 3 to 5 years old with qualifying disabilities to receive free Pre-K at public school sites. Therefore, in any universal Pre-K arrangement, some students with disabilities will already have their funding needs met.

Parental Care Arrangements for Children with Special Needs

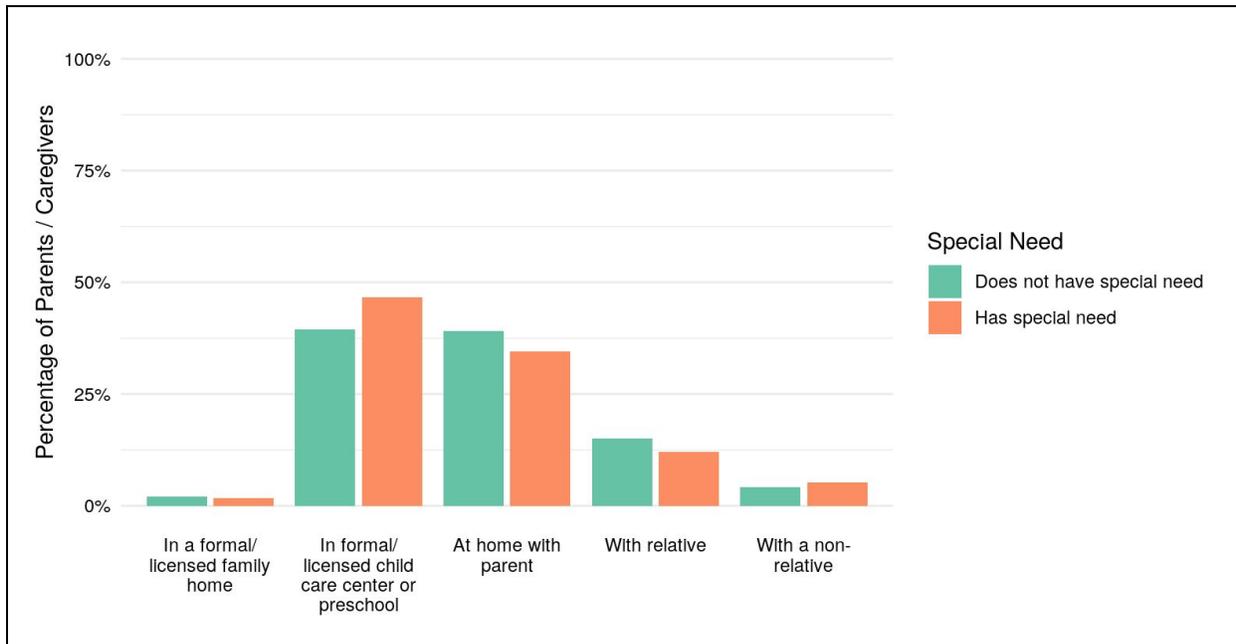
This subsection examines whether children with special needs have different care arrangements for the majority of the day. The information was gathered from the Forsyth Futures parents survey, which asked parents to list each child's "current childcare arrangement for the majority of the day." The survey responses combine four and five-year olds not yet in kindergarten.

Information on children's special needs was gathered from a survey question which asked, "Do any of your children between 0-5 years old have special needs for which you would want/need support in a preschool or early education environment?" The available options were: a) "I do not have a child 0-5 with a special need," b) "Yes, I have a child 0-5 with a special need, but no support is needed," c) "Yes, I have a child 0-5 needing support," or d) "Prefer not to answer." Options 'b' and 'c' were combined to form one group comprising children with special needs.

As a caveat, the definition of a special need in the survey does not necessarily equate to a qualifying disability under IDEA part B. Thus, simply because a parent notes that a child has a special need does not mean that the child received free Pre-K under IDEA part B. But, some of these children, no doubt, would qualify.

Care Arrangements for Children with Special Needs

Care Arrangements of Four and Five-Year-Olds with Special Needs for the Majority of the Day



Forsyth Futures' Parent/Caregiver Survey

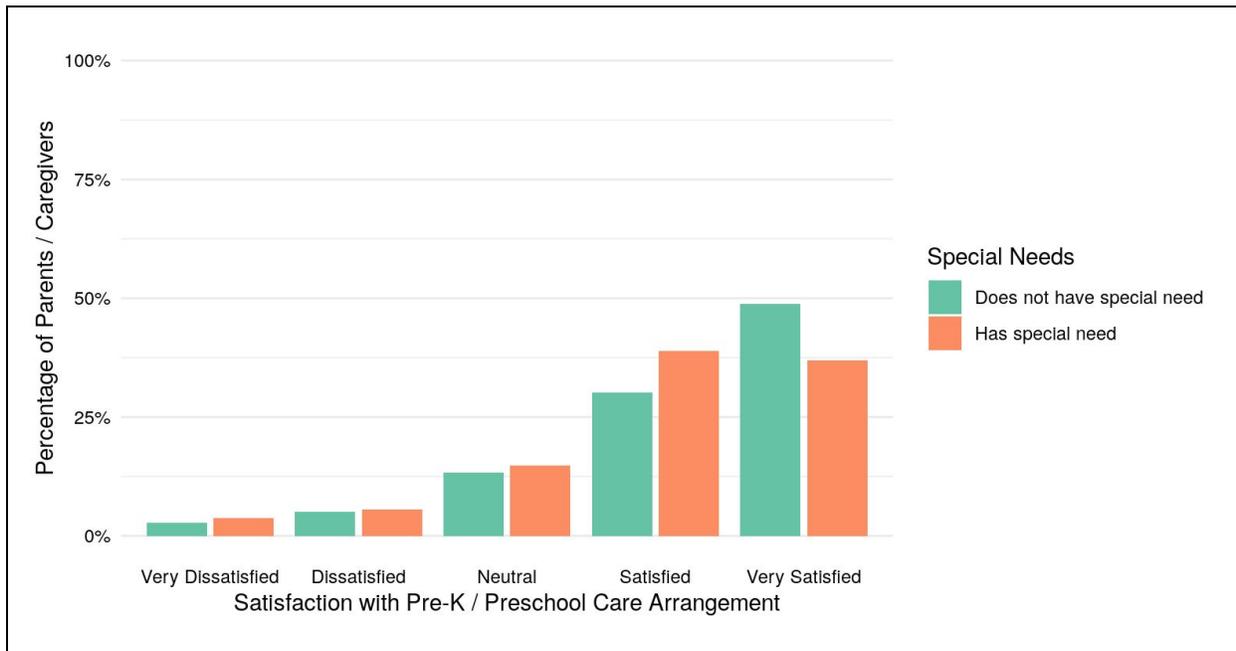
This visualization shows the children with special needs are in formal / licensed care centers at slightly higher rates than other children (47% compared to 40%). But, care should be exercised when viewing these numbers. On one hand, due to the small number of children with special needs in the survey, it is hard to say whether this difference is the product of chance. On the other hand, it would not be surprising if children with special needs had higher formal care rates. Some of these children will be eligible for free Pre-K at public schools under IDEA part B, and this might increase their enrollment in formal care arrangements.

Satisfaction with Care Arrangements for Children with Special Needs

This subsection turns attention to parental satisfaction with care arrangements. Parents' satisfaction was gauged on the parent survey through the following question: "If your child is 4 years old or older, how satisfied are/were you with their Pre-K/preschool care arrangements for the majority of the day during their 4-year-old year?"

Satisfaction with Care Arrangements for Children with Special Needs

Satisfaction with Care Arrangements for the Majority of the Day for Children with Special Needs



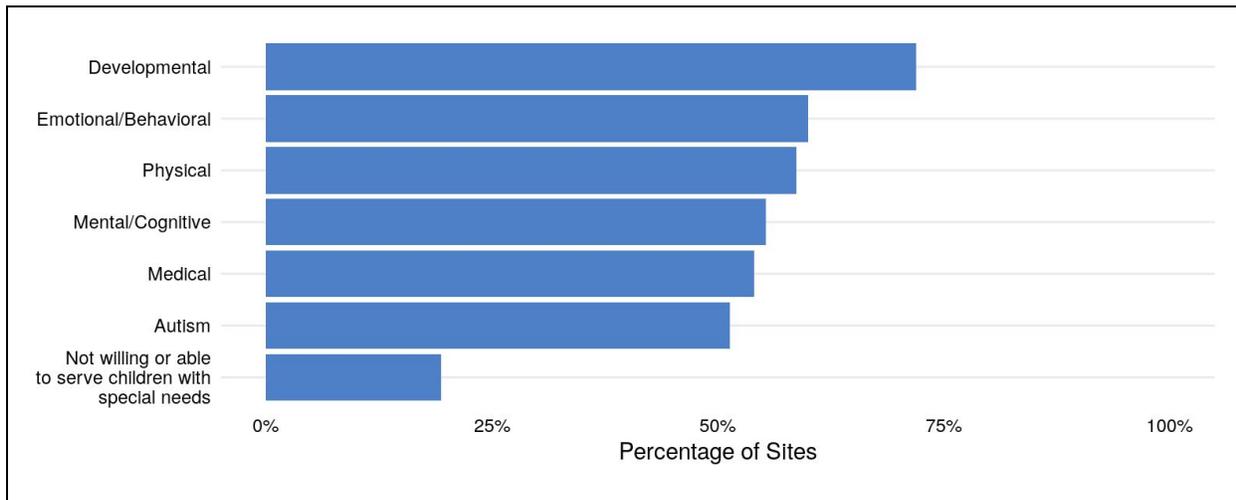
Forsyth Futures' Parent/Caregiver Survey

As shown above, survey respondents did report differences in levels of satisfaction in the satisfied and very satisfied categories between children with special needs and those without. However, due to the small number of respondents that had children with special needs, it is hard to conclusively determine whether the differences in the satisfied and very satisfied categories are the product of chance.

Availability of Special Needs Programs

So far, this section has examined parents' care arrangements for children with special needs and their satisfaction with these arrangements. It now turns to looking at providers' willingness to serve children with special needs. The information in this subsection comes from a question in the provider survey which asked, "Is your program currently serving or willing and able to serve children with special needs? If so, what special needs if your program able and willing to accommodate?"

Providers Currently Serving or Willing and Able to Serve Children with Special Needs



Forsyth Futures' Provider Survey

As shown above, only 20% of providers responding to the survey are not willing to serve any children with special needs. The most commonly served need is developmental at 72% and the least common is autism at 51%.

Conclusions: Care Arrangements for Children with Special Needs

Roughly 47% of four and five-year-olds with special needs are in formal / licensed centers. Although this is higher than the percentage for children without special needs, this difference might be a product of chance due to the small number of children in the survey with special needs. Looking at satisfaction with care arrangements, there is little difference in satisfaction between the parents of children with and without special needs. Finally, the vast majority of providers in the provider survey serve children with special needs and developmental needs are the most commonly served need, while autism is the least commonly served need.

Care Arrangements for Families who Speak a Language other than English

Children from non-English speaking households often have different needs than children from English-speaking households. To better understand these children, this section examines child care arrangements for children by household language. It compares the care arrangements for children in households speaking a language other than English to those of English-speaking households. It then analyzes how well facilities can meet the needs of children in households speaking languages other than English by looking at the percentage of facilities with bilingual staff.

Parental Care Arrangements for Children in Households Speaking a Language other than English

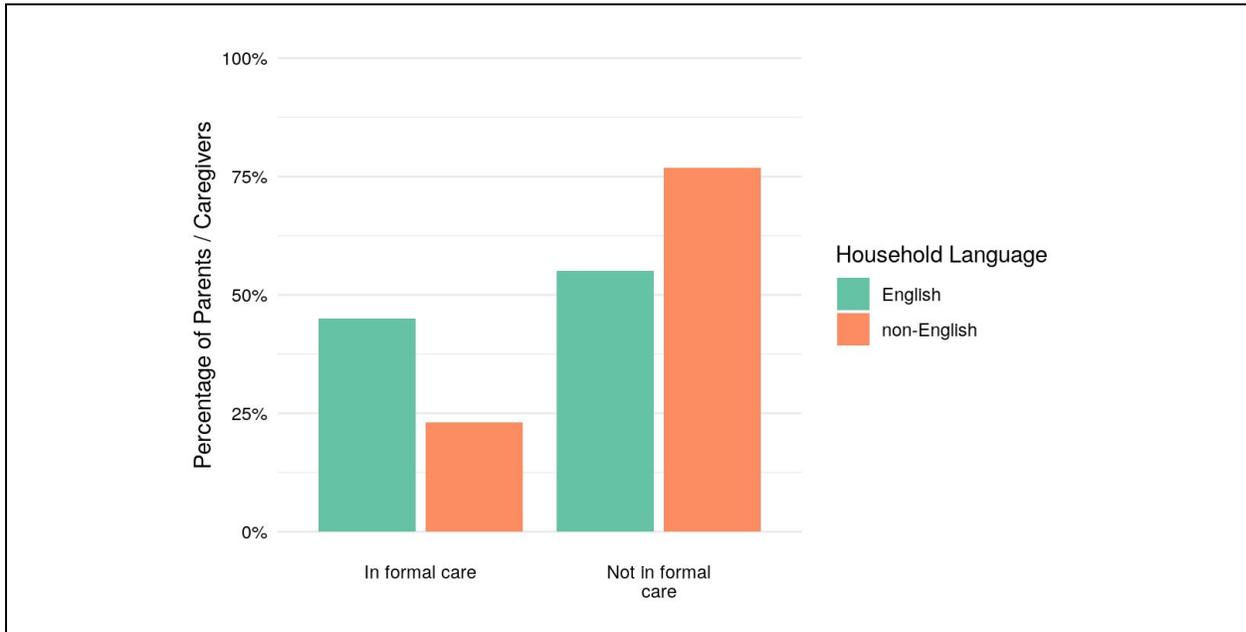
This subsection examines whether children in non-English speaking households have different care arrangements than children in English-speaking households. The information was gathered from the Forsyth Futures parents survey, which asked parents to list each child's "current childcare arrangement for the majority of the day." The survey responses combine four and five-year olds not yet in kindergarten.

To increase the sample sizes within each category, this analysis combines each non-English language into one 'non-English' category, although 89% of the languages in this category are Spanish. To further increase sample sizes within categories, arrangements were combined into either 'in formal care' or 'not in formal care'.⁷

⁷ The categories 'at home with parent', 'with a non-relative', and 'with relative' were grouped into 'not in formal care'; while the categories 'in formal/licensed child care center or preschool' and 'In a formal/licensed family home' were grouped into 'in formal care'.

Care Arrangements for Children by Household Language

Care Arrangements of Four and Five-Year-Olds for the Majority of the Day by Household Language



Forsyth Futures' Parent/Caregiver Survey

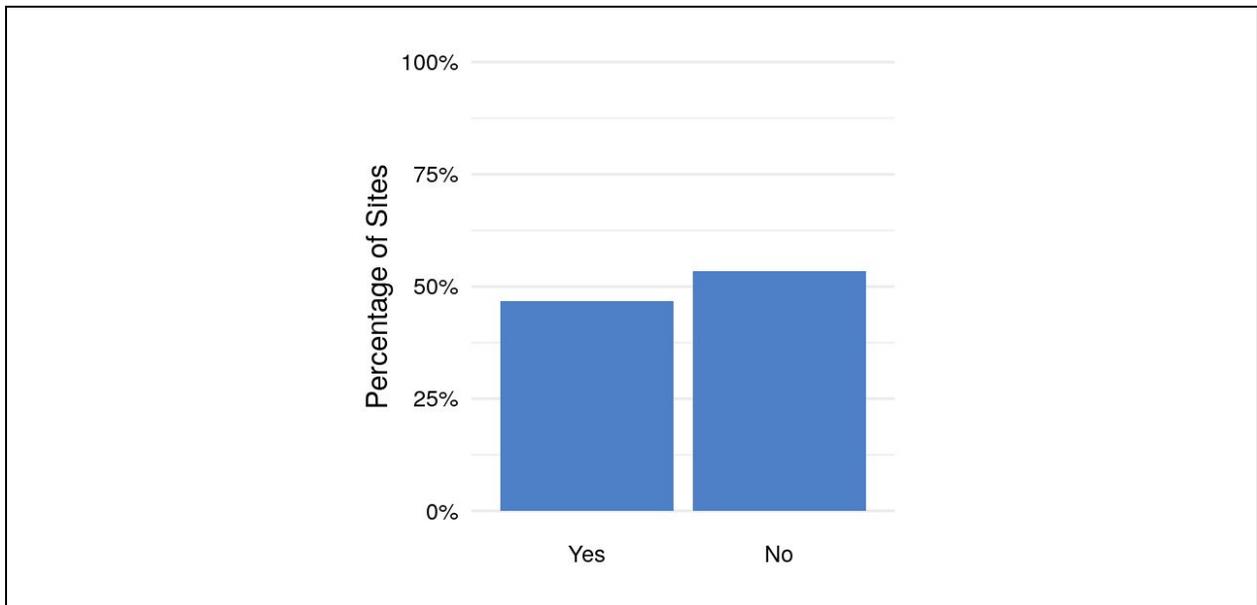
As the visualization shows, survey respondents listing their primary household language as non-English are more likely to not have children in formal care arrangements. 79% of respondents from non-English households did not have children in formal care arrangements, while only 55% of respondents from English speaking households did not.

Presence of Bilingual Staff in Facilities

Although non-English speaking households in the parent survey are less likely to enroll their children in formal care arrangements, children from these households are still enrolled in such arrangements. To help understand supports for these children, the Forsyth Futures Provider Survey asked providers the following question: “Are you bilingual or do you have bilingual staff.” As a follow-up question to those who answered yes, providers were asked, “In which language are you or your staff fluent?”

Providers with Bilingual Staff

Percentage of Providers with Bilingual Staff



Forsyth Futures' Parent/Caregiver Survey

Regarding the question, “Are you bilingual or do you have bilingual staff”, the plot above shows that a small majority of providers in the survey do not have bilingual staff: 53% do not and 47% do have bilingual staff. Additionally, in the follow-up question, 43% of all providers in the survey reported having Spanish language fluency on site.

Conclusions: Care Arrangements for Families who Speak a Language other than English

Respondents to the parent survey from non-English speaking households were less likely to have children in formal care arrangements compared to parents from English speaking households. 79% of respondents from non-English speaking households did not have children in formal care arrangements, while only 55% of those from English speaking households did not. Looking at facilities, slightly more than half, 53%, did not have bilingual staff.

Conclusions: Availability of Care Arrangements for Four-Year Old Children

Slightly less than half of four-year-olds are in formal care arrangements for most of the day, and the majority of four-year-olds in licensed facilities are in 5-star-facilities, and the majority of parents are satisfied with their children's care arrangements. There is a significant discrepancy between the median cost of full-time care for four-year-old children, \$626 a month, and the median cost that parents describe as affordable, \$200 a month. Only 6% of parents responding to the parent survey identified a cost over \$626 a month as being affordable. There are currently openings available for four-year-old children in Forsyth County, however if all of the families indicating interest in enrolling their children in Pre-K if cost were not an option were to enroll their children, there would be a shortage of around 1,000 slots. Cost, limited slot availability, lack of full-time care, classroom overcrowding, and lack of year-round care were the most common factors identified as barriers to Pre-K enrollment.

Hispanic / Latino survey respondents reported a smaller percentage of children in formal care arrangements compared to African American and White, non-Hispanic respondents, and survey respondents who listed their primary household language as a language other than English are more likely to not have their children in formal care arrangements than English-speaking households. Higher income parent survey respondents were more likely to note that their children spend the majority of their day in formal/licensed care centers. However, there were no clear associations between race/ethnicity and income and parent satisfaction in the surveys.

Needs and Preferences of Families

This section examines the Pre-K preferences of families. It draws on both focus groups and surveys to understand family preferences for quality, location, and setting. This understanding can help shed light on parents' willingness to use universal Pre-K and what parents look for in Pre-K facilities.

Key Findings: Needs and Preferences of Families

- Parents generally preferred quality factors relating to curriculum and teacher competence.
- Parents preferred locations close to home, but a moderate number favored locations close to work.
- Parents generally expressed a preference for full-day care, a schedule similar to the school system, and elementary school or private site settings.

Parents' Definition of Quality

Quality According to Focus Groups

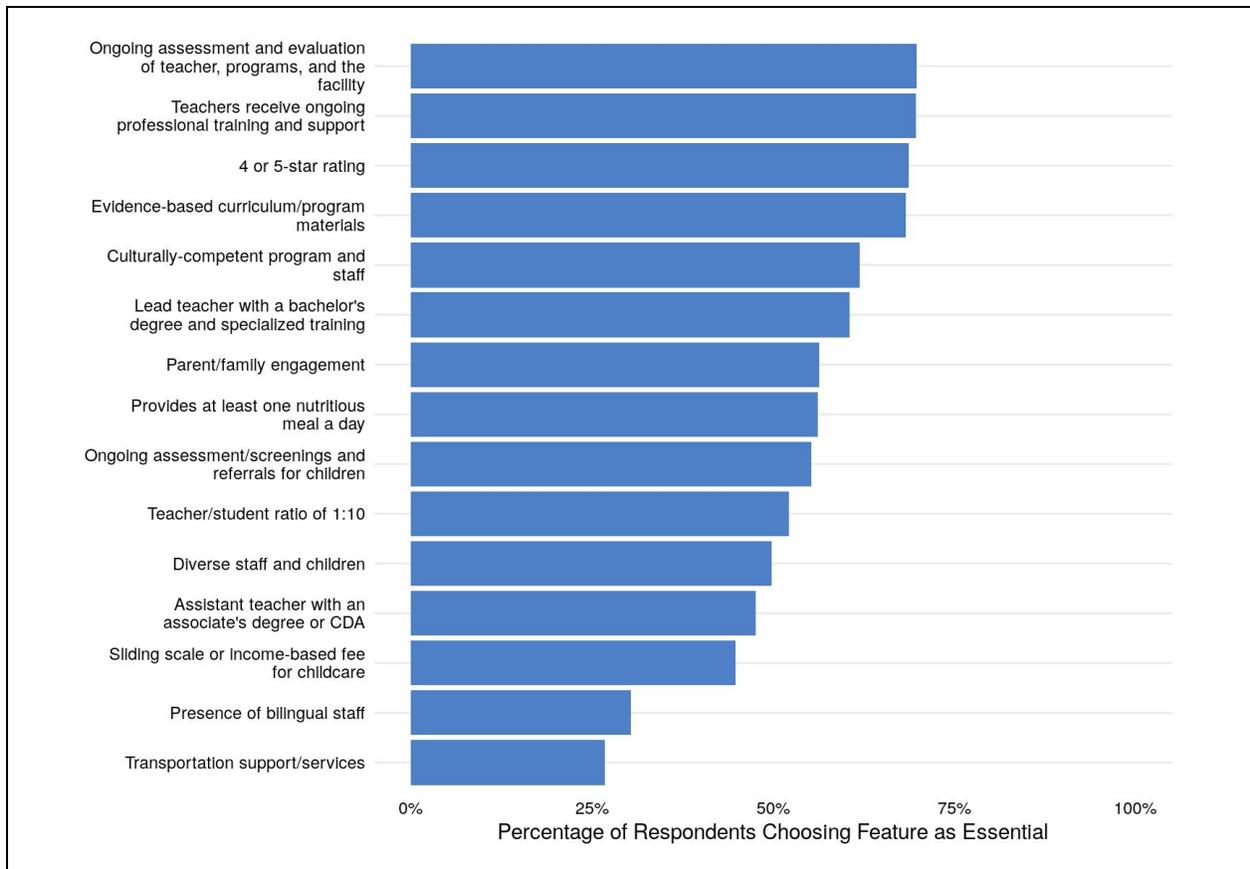
Parents were asked in focus groups how they would describe a high quality childcare setting for four-year-old children and what quality aspects are most important. The most common themes that emerged include the following:

- standardized curriculum that is developmentally appropriate
- individually tailored instruction
- staff and instructors who are caring, well trained, and flexible
- spacious facilities with creative 'specials' or 'activity stations'
- diverse student body with an emphasis on racial, ethnic, and ability inclusion
- racial, socioeconomic, and ethnically diverse student body
- timely communication about activities and progress updates
- facility amenities, including food
- facility security, cleanliness, general appearance, and fostering a 'warm and inviting' space for children and families

Quality According to Parent Survey

Parents' perceptions of the quality standards were also gleaned from the parent survey with the following question: "When thinking about quality Pre-K/preschool for 4-year-old children, if cost were not a factor how important are the following potential features/options for your family?" Respondents chose one of four categories of importance per feature: not important, desirable, essential, and I'm not sure / no opinion.

Survey Respondents Choosing Quality Features as Essential



Forsyth Futures' Parent/Caregiver Survey

Above are the survey results showing the percentage of respondents who selected each feature as essential. Ongoing assessment and evaluation, teachers receiving ongoing training and support, four or five star rating, and evidence based curriculum had the highest percentages at nearly 70% each. Conversely, presence of bilingual staff (30%) and transportation support (27%) had the lowest percentages.

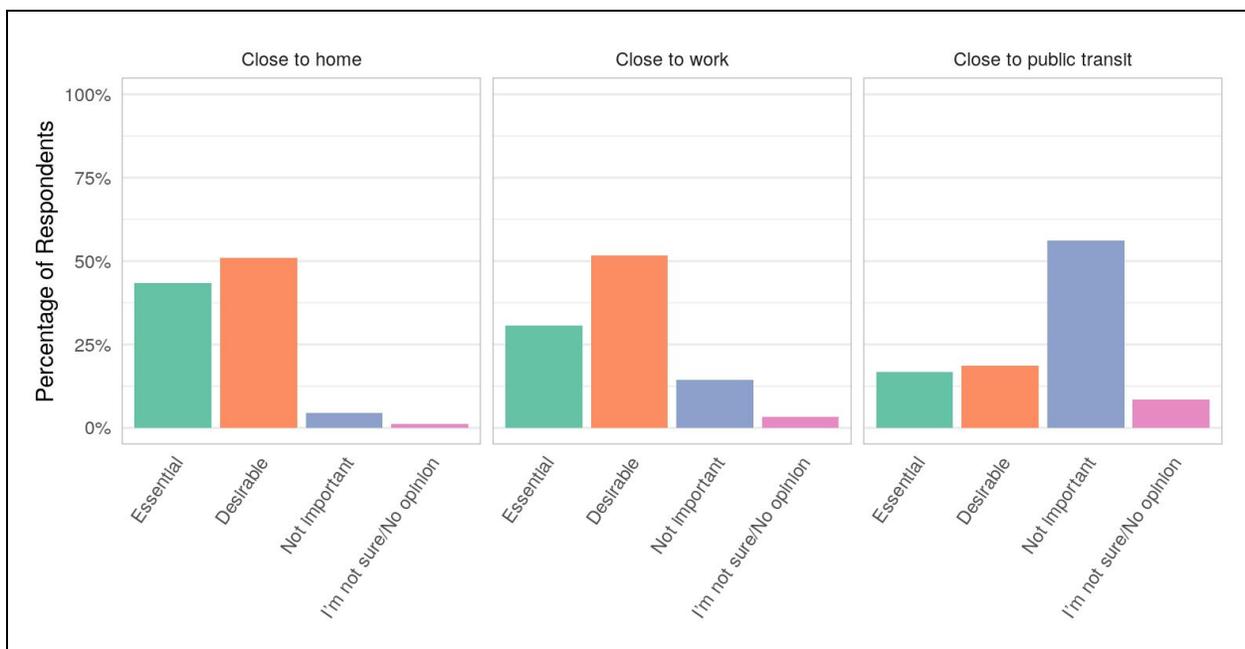
In general, a focus on curriculum stands out as important in both the focus groups and survey. The focus groups identified standardized and age appropriate curriculum as important, and evidence based curriculum was one of the highest rated quality features in the survey.

Parents' Location Preferences

In choosing a Pre-K facility for their children, parents often consider factors beyond quality. One such factor is location. Forsyth Futures gauged parents' location preferences through the following question on the parent survey: "If costs were not a factor, how important are the following location preferences for your childcare facility?"

Parents' Location Preferences for Childcare Facilities

Importance of Childcare Facility Location Preferences for Parents

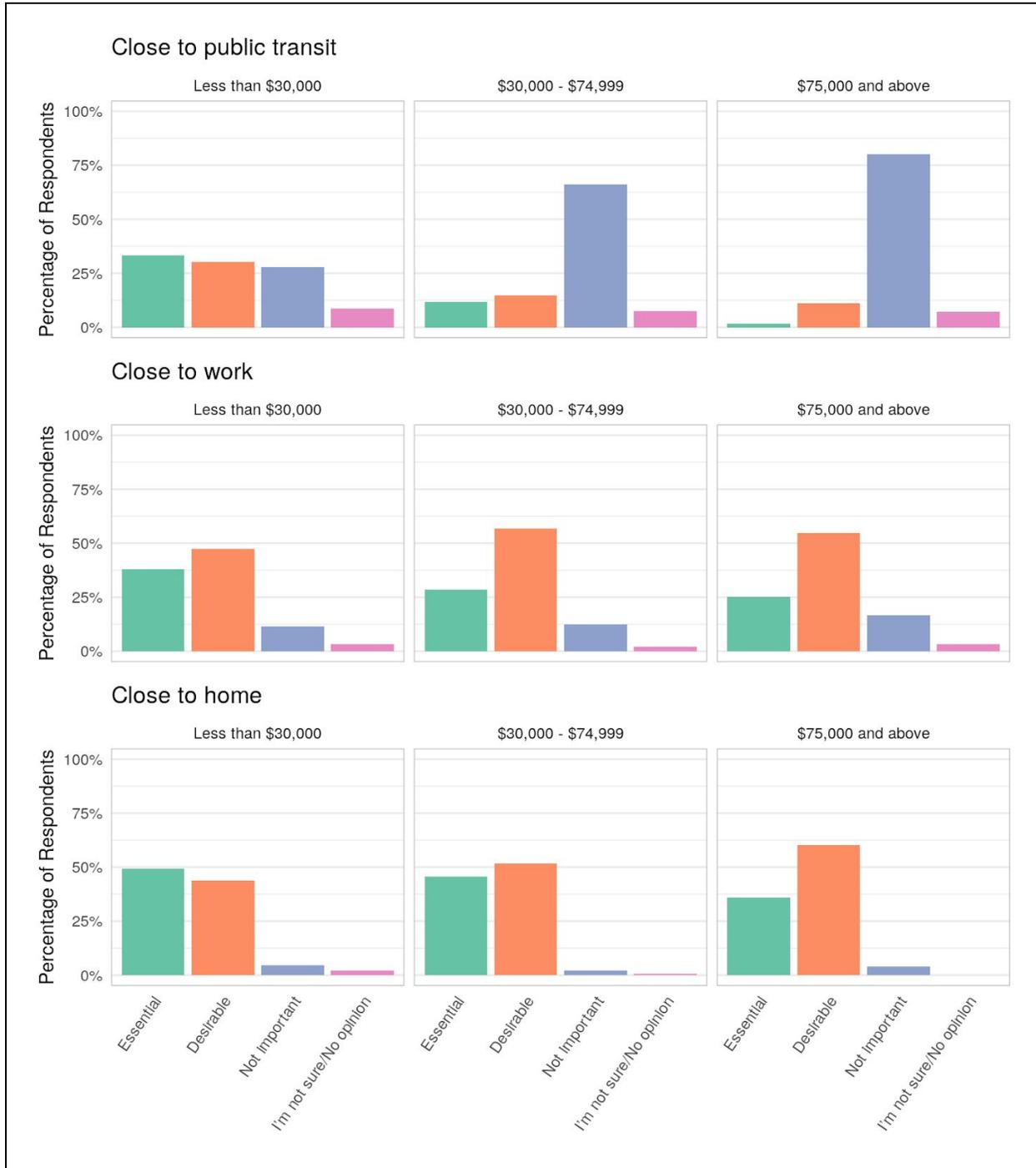


Forsyth Futures' Parent/Caregiver Survey

The results above show that parents, in the aggregate, favor locations close to home over those close to work. Close to home and close to work both have equal percentages for desirable (51%), but close to home has a much higher percentage for essential (43% compared to 30%). Although parents favor close to home over close to work in the aggregate, it should be kept in mind that a large number of respondents still favor locations close to work.

Work preferences can also be compared by income. The visualization below highlights these results, revealing a key findings. Low-income parents value being closer to public transit at much higher rates than others. Specifically, only 29% of respondents making less than \$30,000 viewed being close to public transit as not important, while the rates were 66% and 80% for those making \$30,000 - \$74,999 and \$75,000 and over.

Parents' Location Preferences for Childcare Facilities by Income

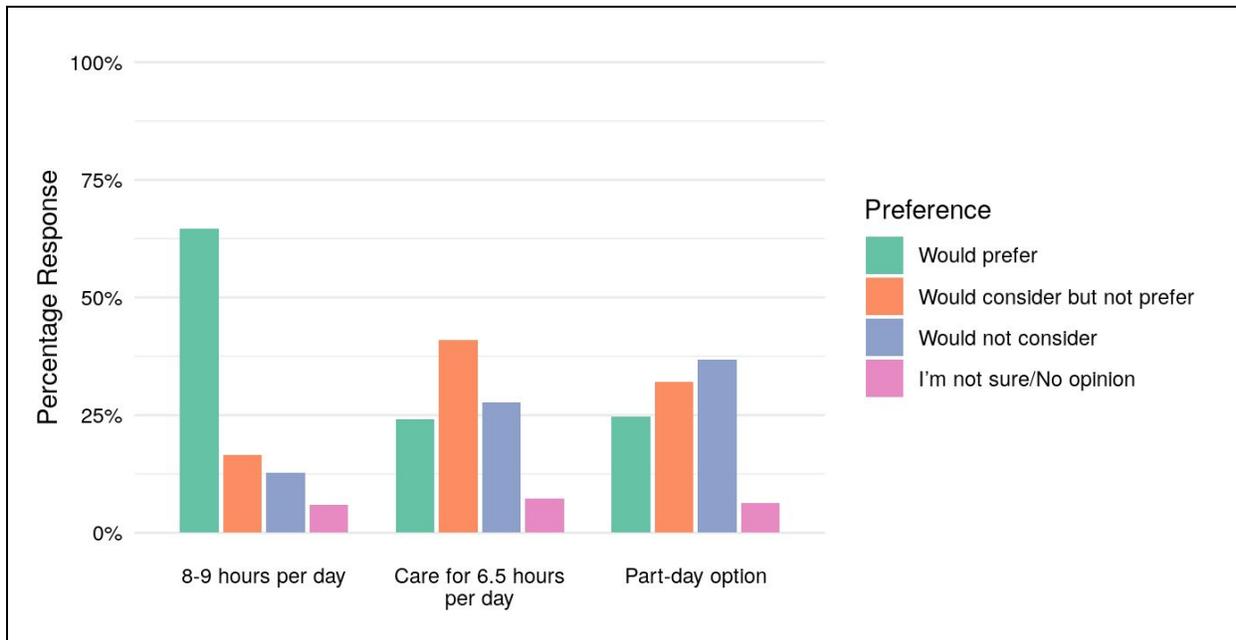


Forsyth Futures' Parent/Caregiver Survey

Parents' Setting Preferences

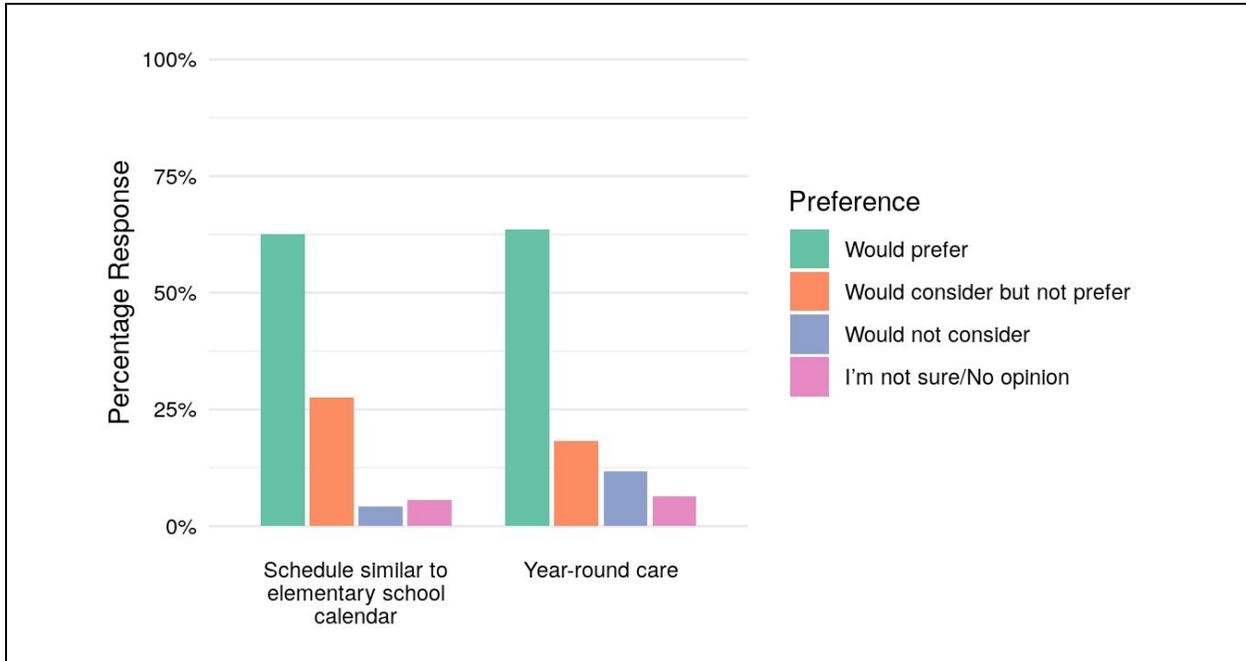
The parent survey also asked parents for their setting preferences. To understand these preferences, it asked the following question: "If costs were not a factor, what type of Pre-K/preschool setting for 4-year-old children would you prefer or have preferred?" For each setting, respondents either selected would prefer, would consider but not prefer, would not consider, or I'm not sure/no opinion. The results are displayed below, broken down into the type of setting.

Parents' Hours Preferences for Pre-K



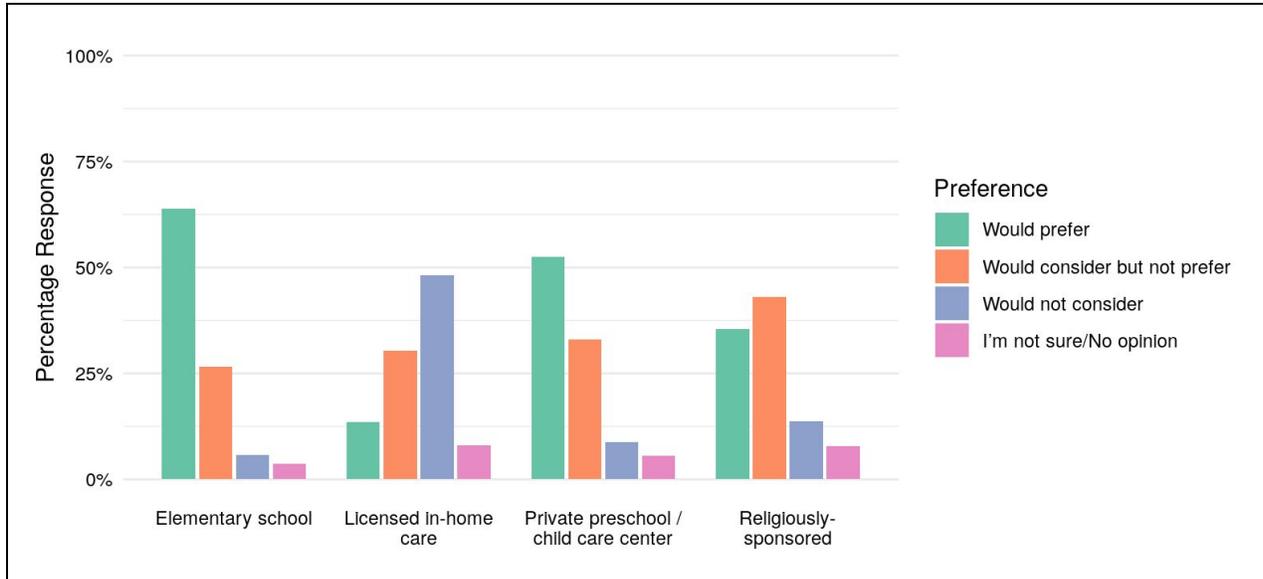
Forsyth Futures' Parent/Caregiver Survey

Parents' Calendar Preferences for Pre-K



Forsyth Futures' Parent/Caregiver Survey

Parents' Facility Type Preferences for Pre-K

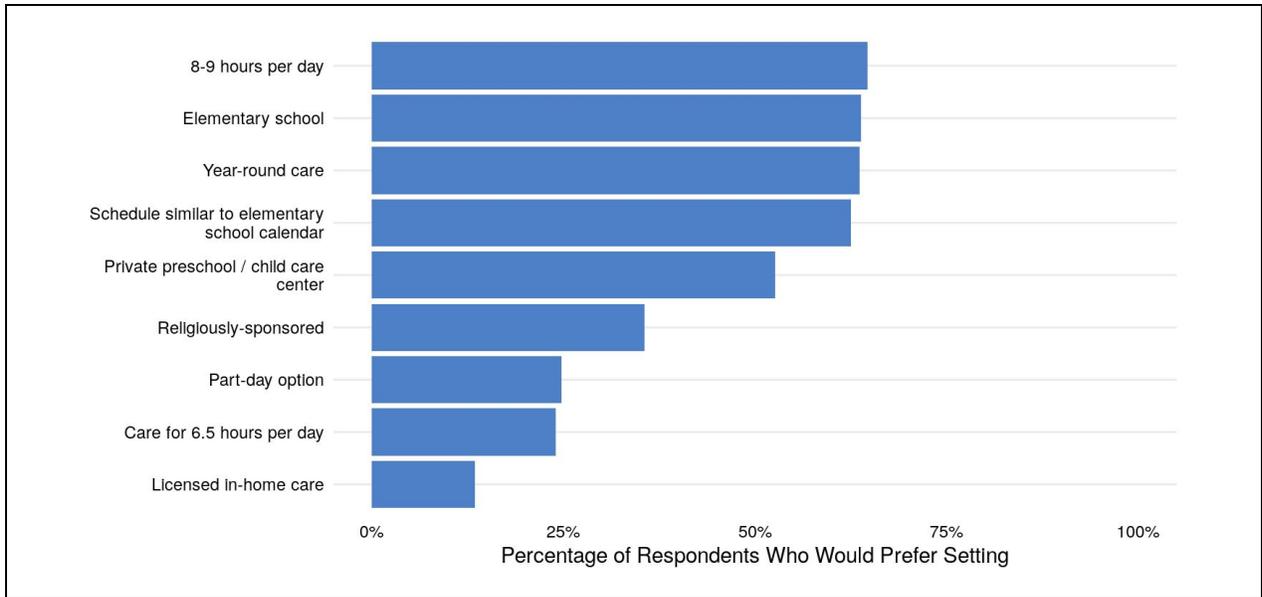


Forsyth Futures' Parent/Caregiver Survey

In the parent survey, parents generally expressed a preference for full-day care. They also expressed a slight preference for a schedule similar to the school system. And, they generally expressed a preference for elementary school or private site settings.

To compare all settings, the next plot displays the percentage of respondents who said they would prefer a given setting. In this plot, all settings are displayed.

Parents' Setting Preferences for Pre-K



Forsyth Futures' Parent/Caregiver Survey

Looking at the results, one item of note is that three of the top four preferences for settings involve school hours or school calendar. Year-round care and schedule similar to elementary school calendar each relate to the school calendar and 8-9 hours per day concerns school hours.

Conclusions: Needs and Preferences of Families

In looking at quality, parents generally preferred factors relating to curriculum and teacher competence. Moving to transportation preferences, parents in the aggregated favored locations close to home, but a moderate number of survey respondents favored locations close to work. Finally, parents' setting preferences centered on preferences that involved the school calendar or school hours. Parents generally expressed a preference for full-day care, a schedule similar to the school system, and elementary school or private site settings.

Current Educator Landscape

Perceived Relationship to Quality

Definitions of Quality

Program administrator descriptions of quality included many idiosyncratic responses - themes included here were identified by at least three respondents each. One major theme on providers definition of quality was individually focused instruction. Respondents described the importance of instruction that is tailored to the interests and capabilities of specific children as being important.

Another theme generated by providers was that they generally reported that high-quality teachers are very important to the quality of the program. One respondent reported that, "I think your first step is having the right teachers in the room. It all comes down to personnel more than you can have the greatest curriculum." Many respondents expressed that education was important for teachers and that it was related to teacher quality. However, a common theme expressed among respondents also was that they feel that there is an over-emphasis on education, especially in the licensing and quality rating system, and that some other factors, such as experience, motivation, or ability to nurture, were more important to teacher quality.

Respondents described experience, knowledge about children, liking children, passion/motivation for teaching, nurturing interactions, and facilitating student-led learning as characteristics that were important to teacher quality. Respondents disagreed about the impact of education on teacher quality, especially in relation to other factors such as experience. The next section further explores administrator perspectives on the importance of education.

Administrator's Perceptions of Staff Education

Many program administrators expressed that education was important for teachers or improved teacher quality, often in the context of helping teachers know what to expect developmentally from their students and helping to identify students who are not meeting developmental milestones, but they felt like it is over-valued in assessments of quality.

A common theme expressed among respondents was that they feel that there is an over-emphasis on education, especially in the licensing and quality rating system, and that some other factors may be more important to teacher quality.

Administrators often described experience (most common) or an innate ability or motivation to nurture children (slightly less common) as more important than education and implied or said explicitly that education was not necessarily correlated with education. Experience or nurturing demeanor was especially noted as more important when describing care for infants and toddlers.

Teachers with education were often but not always described as having just completed their education (and not yet having gained experience) and contrasted with teachers who have experience. Teachers with education were sometimes described as wanting to teach from behind a desk instead of interacting with children.

Some administrators described knowledge of child development as being important but not necessarily associated with a higher level of education.

Some administrators expressed that they would rather hire staff with natural skills or experience (with experience being noted much more frequently) and send them for continuing education than hire staff with education but no experience or natural ability.

Provider Assessment of Star Rating System - Education Requirements

As it relates to the education requirements of the Star Rating System, providers disagreed on the extent to which higher levels of teacher education improve the quality of the program, but respondents who volunteered comments on the educational requirements of the licensing system generally did not believe that education should play as large of a role in the 4- and 5-star assessments as it does. Minority opinions on education and the rating system were that it causes divisions among staff members and that the standards are unrealistic because of the education levels of available teachers in the hiring pool. It should be noted that all comments were by licensed centers.

Parent Definitions of Quality for Teachers

In parent focus groups and interviews, when parents mentioned teachers and quality it was primarily focused on standardized curriculum across settings and program, based on research and developmentally appropriate practices that is diverse in subject matter, and having staff and instructors who are caring, supportive, culturally competent, well trained, flexible, and communicative with families, especially communication around behavior issues.

Recruitment and Retention

In this section, information related to recruitment and retention of teachers was gathered from program administrators, teachers, instructors, and students. More information specifically on the recruitment and retention of teachers and assistant teachers meeting the education standards suggested by the Pre-K Priority can be found on pages 117-137.

Program Administrators Perspective on Recruitment and Retention

In qualitative interviews with program administrators, respondents provided mixed descriptions on how easy or difficult it was to find and retain staff. School-based sites were the most likely to report that they did not experience difficulty with hiring, but some licensed private centers and half-day facilities reported no difficulty as well. GS110's and licensed private facilities were the most likely to report difficulty hiring. GS110's were also the most likely to report difficulty retaining teachers, but private facilities also reported difficulty with retention. School-based sites and half-day facilities were the most likely to report that they did not experience difficulty with retention.

Providers that reported difficulty hiring teachers generally also described hiring teachers with BK licenses as more difficult. There was a consistent perception among providers outside of the school system that competition with the school system made it more difficult to recruit and retain teachers with a BK license. Benefits and pay, including holidays off and the shorter work year, were often mentioned in comparison to the school system, and some school-based providers described the ease of recruiting teachers away from private sites as the reason that they did not have trouble hiring.

Benefits, pay, and work environment were the factors most consistently described by administrators as impacting the recruitment and retention of their staff. Half-day facility administrators were divided on whether providing part-time employment was an advantage or disadvantage to them in attracting and retaining teachers.

Pre-K Teachers Perspective on Recruitment

In qualitative interviews with current Pre-K teachers, many teachers described enjoying working with children and a desire to make a difference in children's lives as the most common things that encouraged people to become Pre-K teachers. A small number of respondents described working in early childhood education as a family friendly profession and felt like that made the work more attractive.

Many respondents cited low salaries and the difficulty of the work as factors that discouraged potential teachers from entering the field. Many respondents described difficult behaviors from children, sometimes accompanied by challenging interactions with their parents as a factor that makes working in Pre-K more difficult. And, some teachers noted that it takes someone with a particular temperament to teach Pre-K and that not everyone is cut out for the work.

Pre-K Teachers Perspective on Retention

In qualitative interviews with current Pre-K teachers, dissatisfaction with management and administrative staff were the most commonly described factor contributing to teacher turnover. Conversely, positive experiences with managers and administrators were described by many teachers as encouraging teacher retention. Most respondents described a lack of support from administrators as something that encouraged turnover or discouraged retention. Support was generally described as the administrator understanding and/or providing for staff needs and included providing materials, advice and support with classroom management, and advice and support in conflicts with parents. Similarly, good managers were most often described as managers that provided support and appreciated their staff. Fair and consistent enforcement of good policies and procedures were also brought up by some respondents as a management issue that influenced teacher retention. This was generally described in the context of government or center policies and regulations being enforced equally without favoritism and those policies and procedures being in alignment with governmental policies and best practice. Issues of favoritism or unequal treatment were noted as a particular issue in this context.

Coworker interactions were also commonly described as impacting teacher retention. This was often discussed in the same interviews where management was discussed. Negative coworker interactions were sometimes described as creating a toxic work environment, while positive coworker interactions were the workplace characteristic most commonly described as encouraging teacher retention. Descriptions of positive coworker interactions were often paired with descriptions of work environments being supportive and staff feeling appreciated.

Pay and compensation were also commonly described as impacting teacher retention. Many respondents identified not being paid “what they’re worth” as a factor that discourages retention. This was also sometimes brought up in the context of not being paid for education or not getting an increase in pay for an increase in education. Pay and compensation were also the only factors described by a few teachers as being particularly important to retaining teachers after they have increased their level of education.

Difficult behavior from students, feeling appreciated, and opportunities to grow were also described as impacting retention. Difficult behavior was most often described in the context of classrooms where teachers did not have the training to manage student behaviors or where classroom behavior had become unmanageable. Many respondents commented that teachers feeling like they are contributing to and are needed by or appreciated by their schools made them more likely to stay. In some cases respondents identified appreciation from parents or management specifically as being an

important factor. Some respondents described having opportunities to grow, sometimes by gaining new skills or taking on leadership positions, as a factor that encourages teachers to stay at an organization.

Students Perspective on Recruitment

Future teachers are interested in working in the education sector and those that choose to work in early education have a particular interest in that specific age group. They connect with this age group and work well with younger children for various personal reasons but some students express interest in wanting to support developing minds of younger children. Instructors hear from students that they often do not want to navigate some of the behaviors of the older children that may be more challenging.

It is also suggested that those looking to be in education consider positions that are available. They are attentive to the likelihood of securing employment. Connected with that availability of jobs is the level of compensation. Pay can be an encouragement to seek employment in various settings- meaning, choosing private or public centers.

Current Teacher Education Levels

This section presents information on estimated numbers of teachers and assistant teachers, grouped by levels of education. The data gathered by the study reflects a sample of sites in Forsyth County. Therefore, a possible range of values also is presented.

The range column in this table and the subsequent table quantify the uncertainty around the estimated number of teachers and assistant teachers. It establishes the lower and upper bounds within which one can be 95% certain the true Forsyth County estimate lies, assuming the model's assumptions are correct. For example, the table shows that there are an estimated 57 teachers in Forsyth County with less than an Associates. Looking at the range column, one can be reasonably sure the true number is between 36 and 79.

Number of Lead Teachers by Highest Level of Education

Education Level	Number of Teachers	Range
Less than Associates	57	36 to 79
Associates Degree	44	22 to 66
Bachelor's Degree or Higher	236	107 to 366
Child Development Associate	8	3 to 13
NC Credential	28	13 to 44
BK License	167	96 238

Forsyth Futures Provider Survey

Number of Assistant Teachers by Highest Level of Education

Education Level	Number of Teachers	Range
Less than Associates	62	35 to 90
Associates Degree	61	32 to 89
Bachelor's Degree or Higher	57	28 to 86
Child Development Associate	45	8 to 83
NC Credential	75	19 to 132

Forsyth Futures Provider Survey

As shown in the tables above, there are an estimated 236 lead teachers with Bachelor's degrees currently at work in Pre-K classrooms in Forsyth County. There are fewer assistant teachers overall and of these, fewer with Bachelor's degrees (63% of teachers vs.19% of assistant teachers). This is consistent with standards for Pre-K classrooms and expectations of the star rating licensing system. This information provides a base from which to plan the nature and intensity of teacher development, moving forward. More information on increasing teacher and assistant teacher education levels to those suggested by the Pre-K Priority can be found on pages 117-137.

Continuing Education

This section includes information from interviews with current Pre-K teachers, administrators, and early childhood education instructors at local colleges and universities about the current status of continuing education in Forsyth County. The section on pages 117-137 includes more information on continuing education that is specific to teachers and assistant teachers working towards the levels of education suggested by the Pre-K Priority's quality standards.

Teacher's Perspective

In teacher interviews, teachers reported the following themes as encouragement for continuing their education:

- Keeping up with changes in the field,
- Desire to improve teaching skills,
- Having a love of learning,
- Maintaining facility requirements,
- Increases in pay, which wasn't brought up by GS-110 or half-day teachers,
- Opportunities to administrate, and
- Scholarships.

Related specifically to the Birth to Kindergarten degree program, teachers cited the following as encouragement for pursuing that degree:

- Opportunity to administrate,
- Increase in pay,
- Internal drive,
- Professionalism or a commitment to the field, and
- Requirements.

Teachers most commonly reported barriers to continuing education include financial burden, including the travel, education being perceived as not relevant to their jobs, the time it takes, and lack of incentive.

The topics of continuing education that teachers thought were the most useful were around discipline and managing difficult behaviors, communicating with parents, particularly around difficult behaviors, and social and emotional development.

Program Administrator's Perspective

When discussing continuing education, program administrators mentioned the following topics:

- A minority of administrators noted online classes as being beneficial to staff because they allowed for more flexibility in when the class time was completed. More common commentary on online classes were that they are not how all students learn best (most common), that they

were inadequate because they did not provide hands on training, or that students may not have access to computers or internet at home.

- Some respondents indicated that child care staff need child care for their own children in the evenings if they are going to attend classes or mentioned that providing childcare or other programming for staff's families or providing training with flexible hours helped incentivize/encourage continuing education.
- Some administrators noted that time needed to care for their own families outside of work was a barrier to completing evening classes.
- Some administrators expressed that older staff with a lot of experience were less willing to go back to school.

Instructor's Perspective

One program mentioned an overall decrease in enrollment in to the early childhood education programs. The other mentioned seeing an increase in interest in their program and primarily due to the residency license process. Rather than assuming decrease in overall interest in the profession, online or distance learning options was mentioned as a possible reason for decline in program enrollment.

It is suggested that licensing requirements can be a barrier for some students, particularly the increase in requirements for teacher licensure. Students' fiscal situation may not allow them to take the time to fully complete coursework and required time away from earning an income. An example mentioned was of an unpaid student teaching requirements - students are required to complete a particular number of hours for student teaching and without the ability to be compensated financially for that time can be a challenge. One program has many already working professionals seeking their credentials or supplemental education and they do not have the capacity to completely drop their work to complete education requirements.

Another barrier mentioned is navigating the landscape of licensing options and requirements. Students trying to balance work and life often rely on the support from administration, mentors, and staff advisors. One instructor mentioned having a one-stop repository of information would lessen confusion and keep information concise.

It was reported that students also need to feel the value-add of their education. Rather than just going through the motions of completing their coursework, students need to feel supported by their programs, employers, and community. Many cannot take time off work to be in school due to their employer's inability to find or support substitute teachers.

One way education can be facilitated is through paying students during their time of practicum, internship, or student teaching.

Administrator Barriers to Continuing Education

Program administrators cited the following as barriers to supporting education:

- The need and cost of replacing teachers who need to take classes during the work day with a teacher at the same education level for the class and travel time was noted by some administrators.
- A few administrators noted that staff who improve their education may not stay at their center or in the early childhood field.
- A minority of administrators mentioned that not being licensed made it more difficult to increase staff education levels because they were unable to access resources for funds like continuing education and because they could not justify raising tuition fees to pay staff with higher education levels without a rating.

Conclusions: Current Educator Landscape

If one of the goals, moving forward, is to have a licensed and four-year degreed teacher in every prekindergarten classroom, data from this study suggest there is a “bank” of teachers currently holding desired qualifications. That stated, it may be important to consider pipeline development strategies to ensure a sufficient bank of teachers is maintained into the future and can keep pace with project scale-up plans.

It is difficult (and perhaps unwarranted) to disentangle discussions of quality from those of education. In thinking about quality, there appears to be a combination of critical factors that include how a teacher is prepared educationally, a teacher’s depth and breadth of experience, and a teacher’s inherent affinity for the work. These factors may be considered teaching characteristics that are individual to each teacher. At the same time, quality also is expressed in teaching practices, including the nurturing and caring exhibited to children (and perhaps more importantly the nurturing and caring provided to children with challenging behaviors or needs) as well as ability to effectively implement a well-designed and developmentally appropriate curriculum, interact positively with administrators and co-workers, and effectively communicate with and engage parents and family members. It is unclear the extent to which these may be considered features that can be developed with consistency across teachers, irrespective of education, experience, etc. Thus, while education certainly is a leading indicator of classroom quality, there still may be a need to provide ongoing support, encouragement, and guidance in teacher practices.

Long-term stability depends, in part, on the ability to develop, hire, and retain qualified teachers providing high-quality instruction. In this, there may be a disconnect between the nature and extent of assistance teachers report they need (e.g., financial support) and the willingness of administrators or directors to provide the assistance. This may be especially true for private and religious-affiliate sites, some of whom have concerns about educating teachers only to lose them to better compensated positions within the school system (or, to other careers). It should be noted that compensation is not the sole factor that can influence teacher retention. It is also important to consider workplace morale and climate—especially as these are conditions that can be addressed through ongoing technical assistance and training to site administrators or directors.

Current and Projected Trends

This section looks at population projections and trends. It shows four-year-old population projections, past demographic population trends for four-year-olds, trends for household language, trends for enrollment, and parent and provider perspectives on trends and future demand for Pre-K.

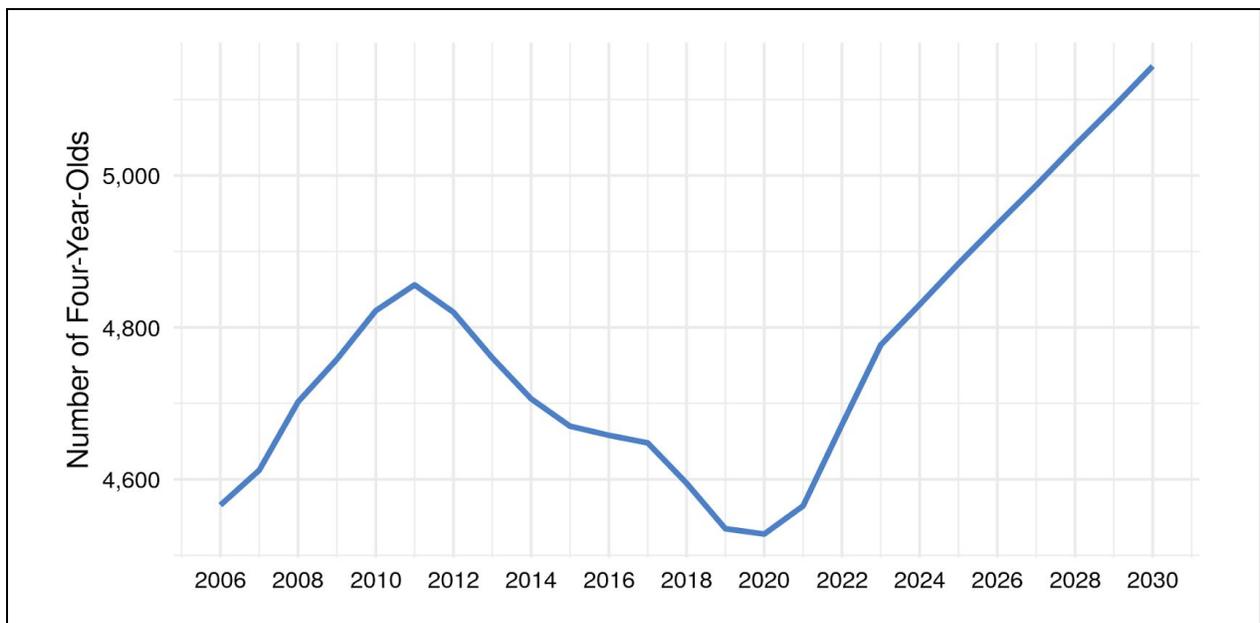
Key Findings: Current and Projected Trends

- The population of 4-year-olds is expected to start rising in 2020.
- The percentage of 4-year-olds enrolled in licensed facilities has remained stable, but enrollment in licensed facilities is likely to increase as the population of 4-year-olds increases.
- Facility administrators expressed that there are not enough teachers to meet future demands for Pre-K teachers, especially if those teachers need to have a BK license, and current teachers and students in teaching programs expressed that they felt that interest in the field is declining.

Projected Four-Year-Old Population

The North Carolina Office of State Budget and Management releases population projections by age.⁸ These projections, combined with past four-year-old populations and shown below, reveal that Forsyth County is currently in a low point for four-year-old population. This population has dropped since roughly 2011, but it is expected to begin rising again in 2020.

Four-Year-Old Population Projections



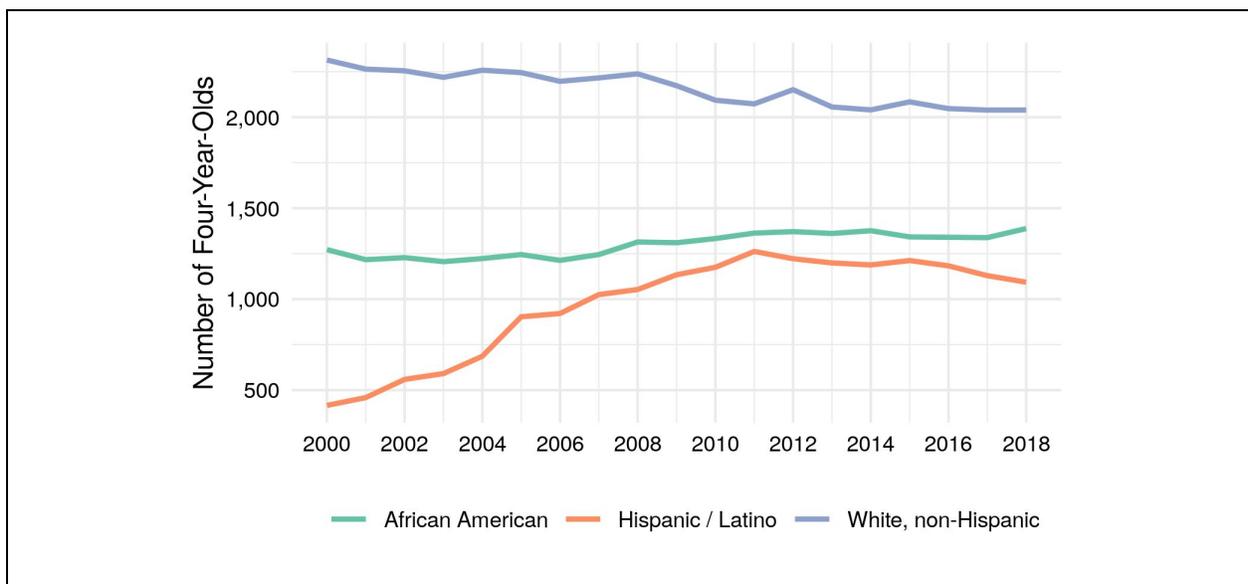
North Carolina Office of State Budget and Management

⁸ North Carolina Office of State Budget and Management. (n.d.). *County/State Population Projections - Sex, Race, Age Groups*. Retrieved from <https://www.osbm.nc.gov/demog/county-projections>.

Four-Year-Old Population Trends by Race/Ethnicity

The North Carolina Office of State Budget and Management does not release age population projections by race / ethnicity. But, past trends can provide a window into future projections. The chart below shows four-year-old populations in Forsyth County from 2000 to 2018. There are two trends to note. First, the Hispanic / Latino population rose sharply until around 2010 and then plateaued. Second, the white, non-Hispanic population has experienced a slow decrease since 2000.

Four-Year-Old Population Trends by Race/Ethnicity



The National Center for Health Statistics. Bridged-Race Resident Population Estimates

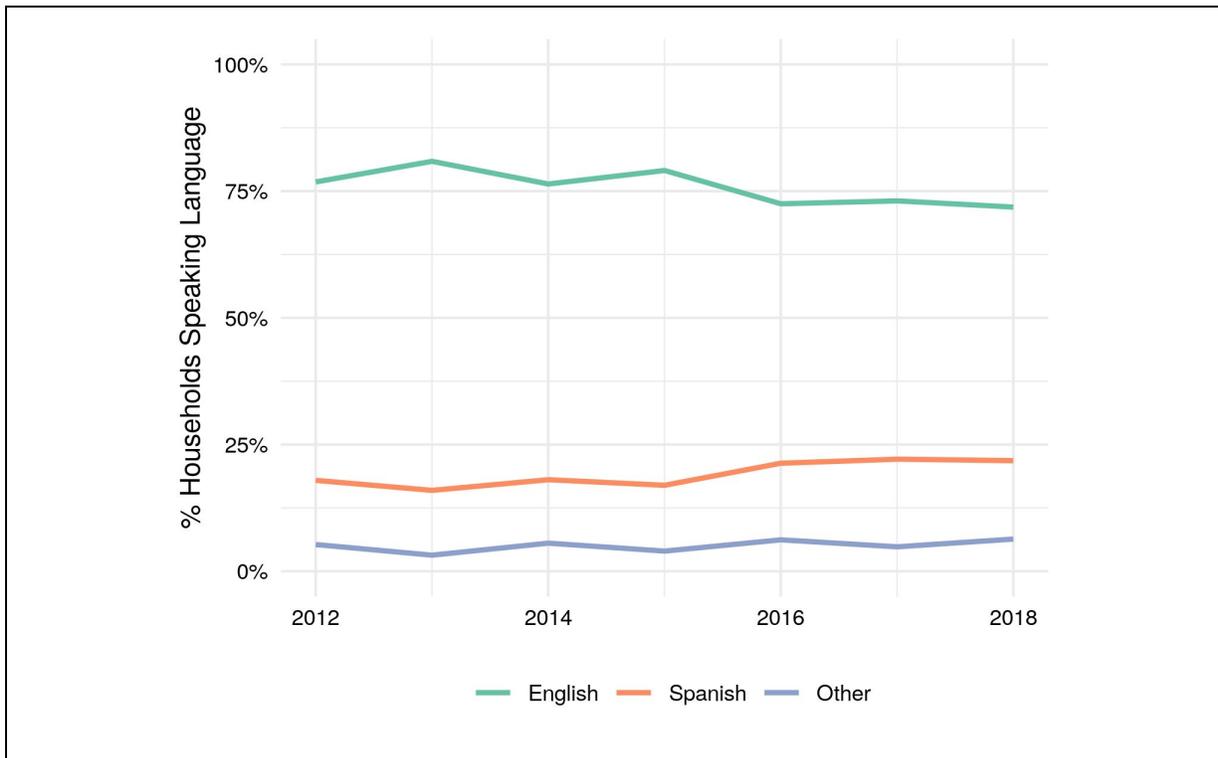
Trends by Household Language

Single year household language information represents the percentage of households with children sixteen and under that have a given household language. Households represent all households with children sixteen and under. Households with children sixteen and under are used instead of households with four-year-olds to increase the sample size of the data.

The gradual rise of Spanish-speaking households and the decline of English highlight the trend. The percentage of English speaking household declined from approximately 77% in 2012 to 71% in 2018, while the percentage of Spanish speaking households rose from roughly 18% in 2012 to 22% in 2018.

Trends by Household Language

Percentage of Households with a Given Household Language by Year



U.S. Census Bureau; American Community Survey, One-Year Public Use Microdata Sample, 2012-2018

Conclusions: Projected Four-Year Old Population

The total number of four-year-olds in Forsyth County has dropped since 2010, but is expected to begin increasing again by 2020. Looking at these trends by race / ethnicity, the Hispanic / Latino four-year-old population rose from 2000 to 2010 and then plateaued, while the white, non-Hispanic four-year-old population has steadily dropped since 2000.

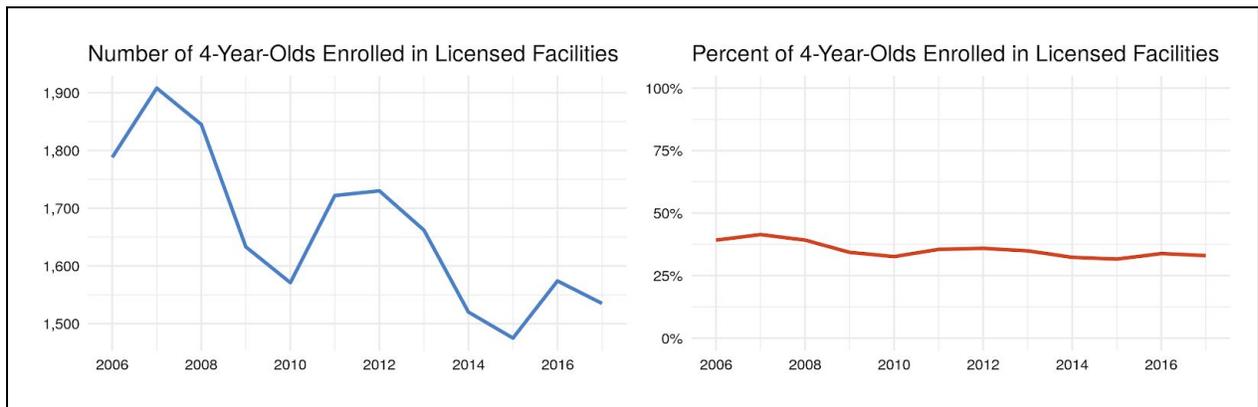
Number of Four-Year-Old Children by Care Arrangement

This section looks at population projections and trends. It shows enrollment trends in licensed care facilities and parents' and providers' perceptions of future demand for Pre-K.

Enrollment Trends for Licensed Care Facilities

Combining the four-year-old population trends and projections information in the previous section with four-year-old licensed facility enrollment data allows for a look at trends in the percentage of four-year-olds enrolled in licensed facilities. The visualization below shows the overall trend in four-year-old enrollment at licensed facilities on the left, along with the percentage of four-year-olds enrolled on the right. The number of four-year-olds enrolled dropped as the total four-year-old population declined, but since 2008 the percentage of students enrolled has remained stable at around 33%. These numbers imply that demand for enrollment at licensed facilities has remained constant since 2006.

Number and Percentage of Four-Year-Olds Enrolled in Licensed Facilities



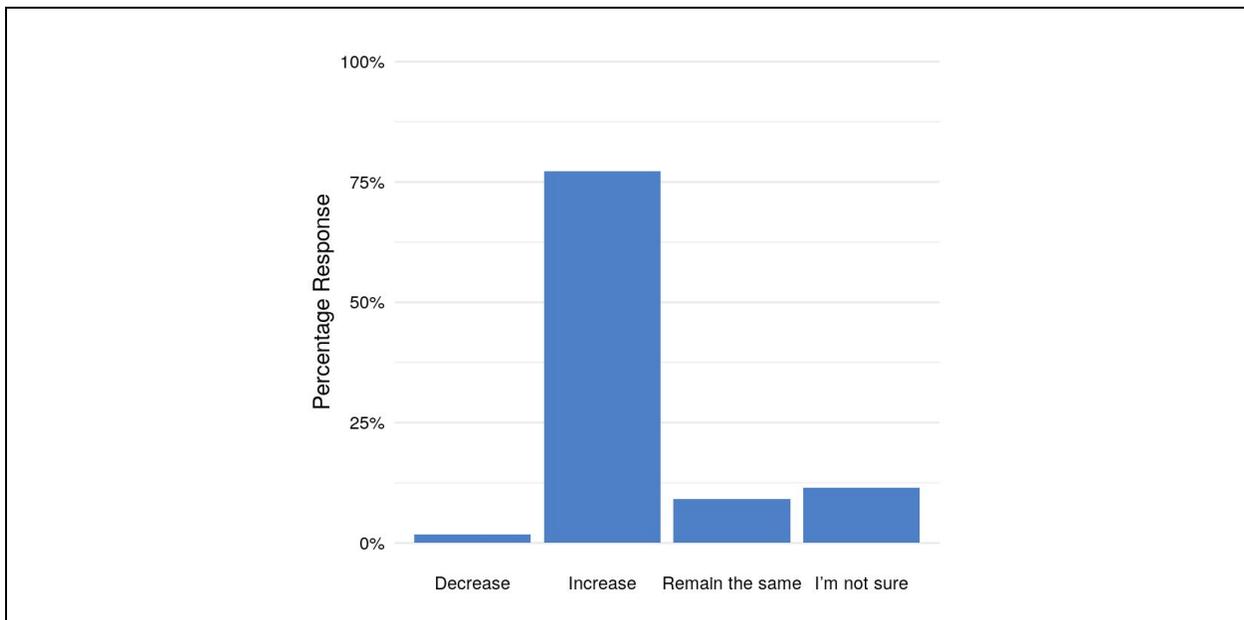
North Carolina Child Care Statistical Report

Parents' Perceptions of Future Demand

Pre-K enrollment numbers in licensed facilities have generally moved with the four-year-old population. Knowing this, it is possible to contrast this with information from the parent survey on parents' perceptions of future demand. The parent survey collected this information by asking parents, "When thinking about the demand for Pre-K/preschool for 4-year-old children over the next several years, do you believe demand will: (a) decrease, (b) remain the same, (c) increase, (d) I'm not sure, (e) or prefer not to answer?"

As the visualization below shows, the vast majority of parents (77%) believe demand for Pre-K will increase over the next several years. This is in agreement with information gained from focus groups with parents, where there was shared agreement that demand would likely increase in the future.

Parents' Perceptions of Pre-K Demand



Forsyth Futures' Parent/Caregiver Survey

Conclusions: Number of Four-Year-Old Children by Care Arrangement

The percentage of 4-year-olds in licensed facilities has remained stable since 2006, but enrollment in licensed facilities is likely to increase as the population of 4-year-olds increases. Parents expressed in focus groups and the parent survey that they believe the demand for Pre-K/preschool for 4-year-old children will increase.

Conclusions: Current and Projected Trends

The population of 4-year-olds in Forsyth County has been decreasing in recent years, but is expected to start rising in 2020. The percentage of 4-year-olds enrolled in licensed facilities has remained stable, but enrollment in licensed facilities is likely to increase as the population of 4-year-old children increases. And, the parent survey suggests that interest in Pre-K is increasing. Qualitative interviews suggest that there may not be enough Pre-K teachers to meet the future demand, especially if those teachers are expected to have BK licenses, and teachers and students in early childhood education programs at local colleges and universities describe declining interest in the early education field, which could further reduce the number of teachers available in the future.

Pre-K Priority Goals

Key Findings: Pre-K Priority Goals

- Providers are generally willing to accept funded slots and expand their capacity if necessary, but most providers would need additional resources to expand.
- No sites are currently meeting all of the Pre-K Priority's quality standards and no sites reported being willing to meet all of the standards without additional resources or supports.
- About 57% of providers were willing and able to meet all of the standards if additional supports were provided.
- Screenings, especially for mental health, and providing a family support person are the standards that the most providers would need support to provide.
- Having a 4- or 5-star license and providing 6.5 hours of instruction a day were the two standards that providers most often reported being unwilling or unable to meet.

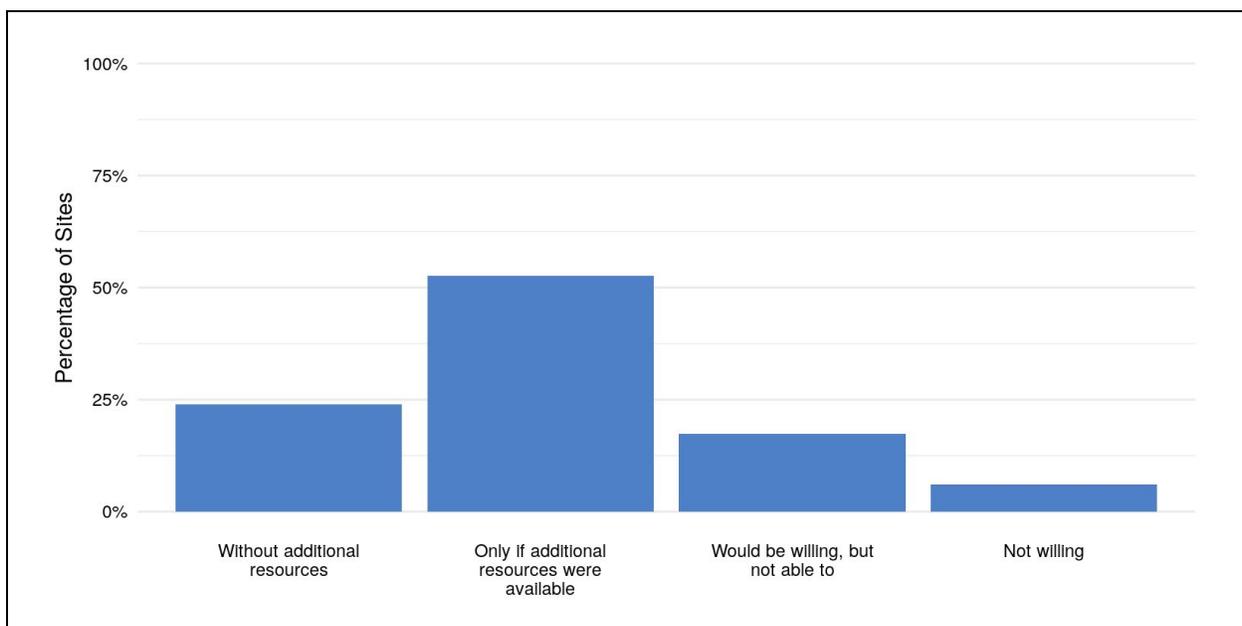
Slot Expansion

This section looks at Pre-K expansion. It examines providers' willingness to expand and factors impacting this willingness. The section ends by identifying areas ideal for Pre-K expansion.

Provider's Willingness and Ability to Expand

To gauge providers' willingness to expand, they were asked, "How willing and able would you be to increase the number of 4-year-olds served in your program?"

Providers' Willingness and Ability to Expand



Forsyth Futures' Provider Survey

The visualization shows the percentage of facilities willing to expand under various conditions. The majority of sites in the survey (53%) are only willing to expand if additional resources are available, but only 6% of sites are not willing to expand.

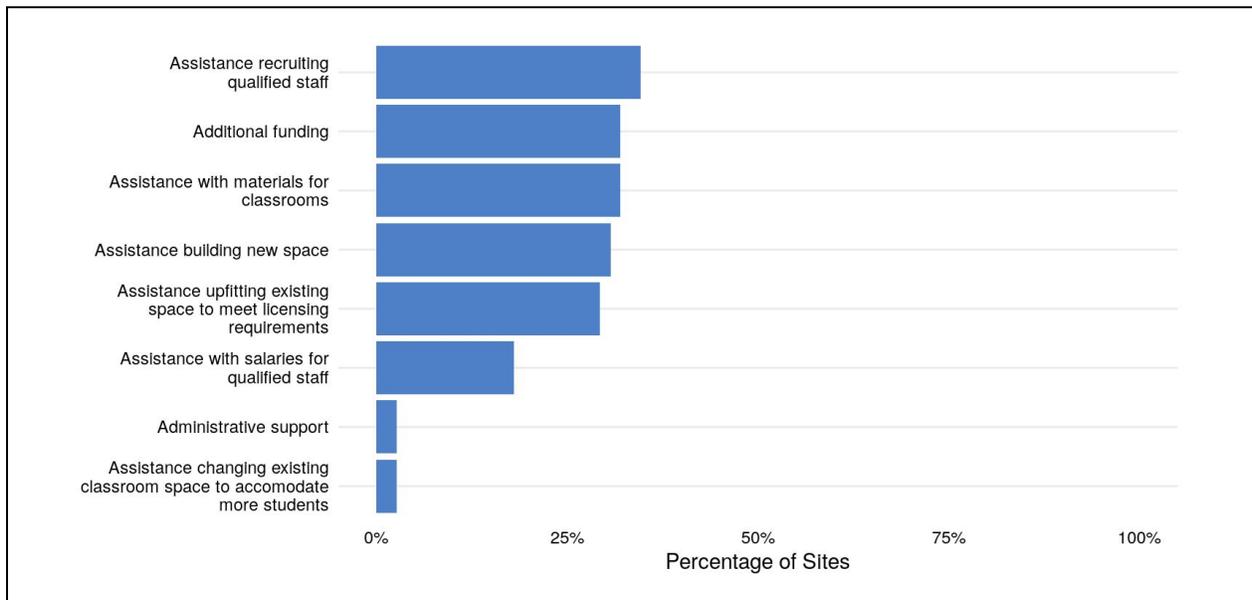
Factors Influencing Willingness and Ability to Expand

Providers only willing to expand under certain constraints were asked follow-up questions to gauge either the supports they would need to expand or which factors prevent them from expanding. The results from these two questions are presented below.

Supports Required for Expansion

Facilities that said they would be willing and able to expand only if additional supports or resources were available were asked what supports they would need.

Supports Needed to Expand Program



Forsyth Futures' Provider Survey

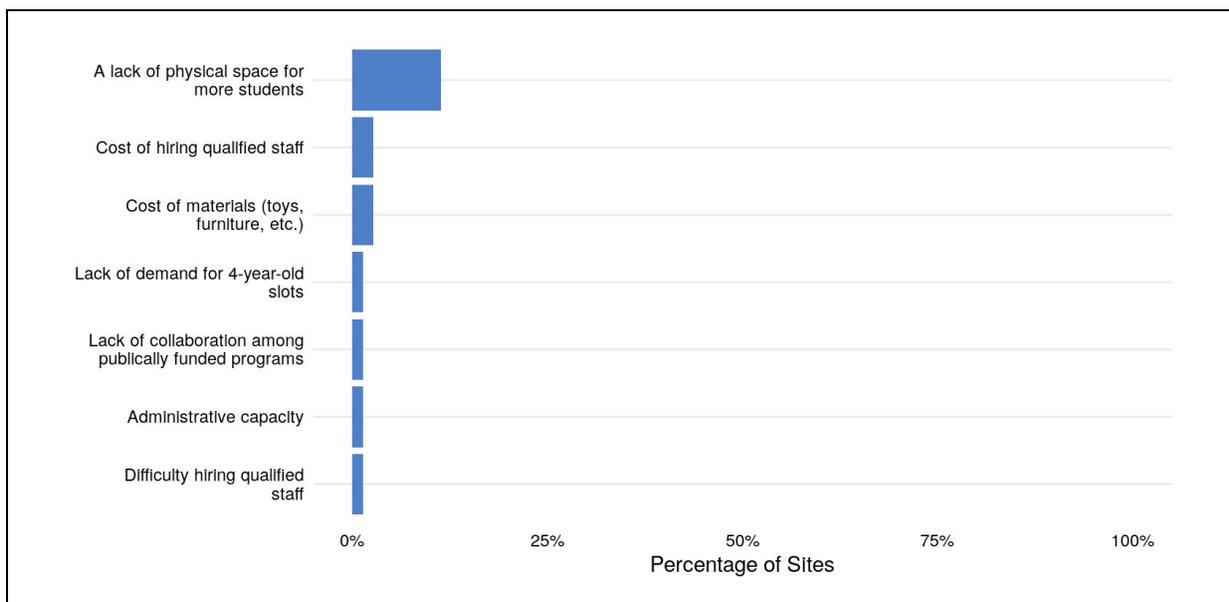
The results show the percentage of all providers needing the given support. The most common support needed was assistance recruiting qualified staff at 35%, but the top five supports were all at or above 30%.

Factors Preventing Expansion

Those facilities that said they would be willing to expand the number of 4-year-olds served, but were not able to, were asked what factors prevented them from expanding. Since few facilities said they would be able to expand, but were not willing to, there were few responses to this question. Also, the percentages reflect the percentage of total providers in the survey.

Despite few providers responding to the question, a clear most frequent response emerged. The vast majority of facilities who responded to this question noted that the factor preventing them from expanding was a lack of physical space for more students.

Factors Preventing Expansion



Forsyth Futures' Provider Survey

Factors from Qualitative Findings

To provide context to the survey results, Forsyth Futures also conducted interviews with providers. These interviews allowed Forsyth Futures' researchers to gain additional insights into facilities' willingness to expand.

One theme emerging from these interviews centered on administrative capacity. Many providers noted that the ability to manage large programs required a specialized skill set not all administrators possessed. Some of these providers recommended technical assistance or training for administrators as part of the expansion process. Along the same lines, some providers said that increasing the size of their

programs would require hiring more administrators and those administrators would need certain education levels to meet licensing requirements.

Some providers reported that participating in Pre-K expansion could provide them with the opportunity to build relationships with new families who may enroll siblings in the program or enroll their Kindergarteners in their school after Pre-K. This aspect may make participation more attractive.

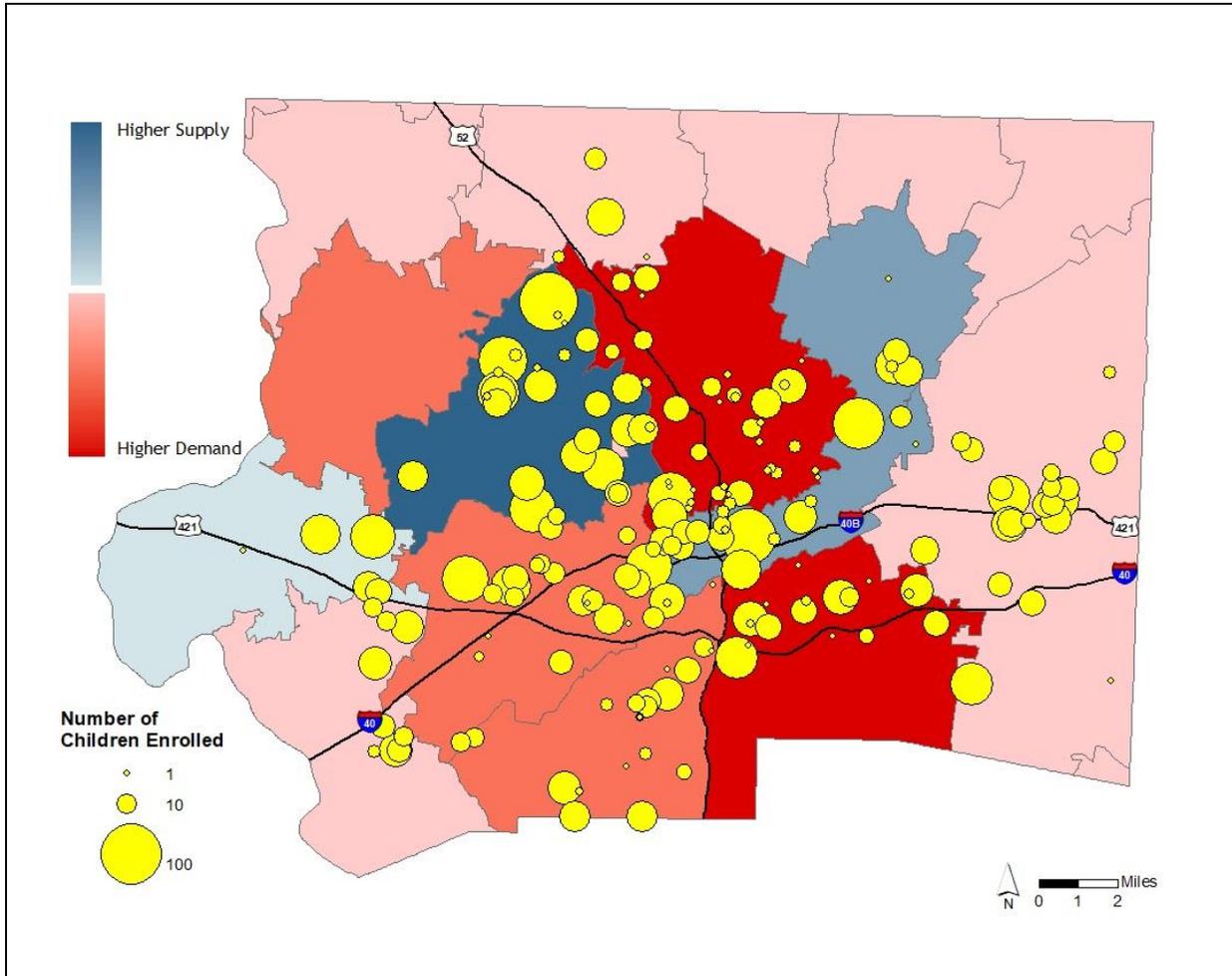
Regarding space for expansion, many providers said that they did not have enough physical space for additional children. But, some did indicate that they had space for additional classrooms or that they could shift classrooms around to make space to expand Pre-K. Sites willing to create space were disproportionately NC Pre-K or Head Start sites. Finally, some providers noted that whether their available space met the physical space requirements of the program might impact whether they participated in Pre-K expansion.

Ideal Locations for New Expansion

Comparing the number of children that are estimated to live in a given area with the number of four-year-old children that are enrolled at facilities in the same area can provide insight into where additional Pre-K classrooms need to be added. One caveat with this approach is that parents consider factors beyond location from home when considering a Pre-K facility, potentially including things like location considerations other than residential proximity, such as proximity to work, or non-location factors such as costs and star rating.

As a way to estimate mismatches in supply and demand, the map below subtracts the estimated number of four-year-olds in a given ZIP code from the number of four-year-olds enrolled at facilities in that same ZIP code. Darker red indicates that there are more four-year-olds in that ZIP code than there are children enrolled at facilities in that ZIP code, or that the demand is much greater than the current enrollment or supply. Darker blue signifies the opposite, that there are more children enrolled in facilities in that ZIP code than are estimated to be living in that ZIP code, in other words supply is exceeding the demand. Each yellow circle represents a facility and the size of the circle is proportional to the number of children enrolled at the facility.

Supply and Demand Matching with All Facilities

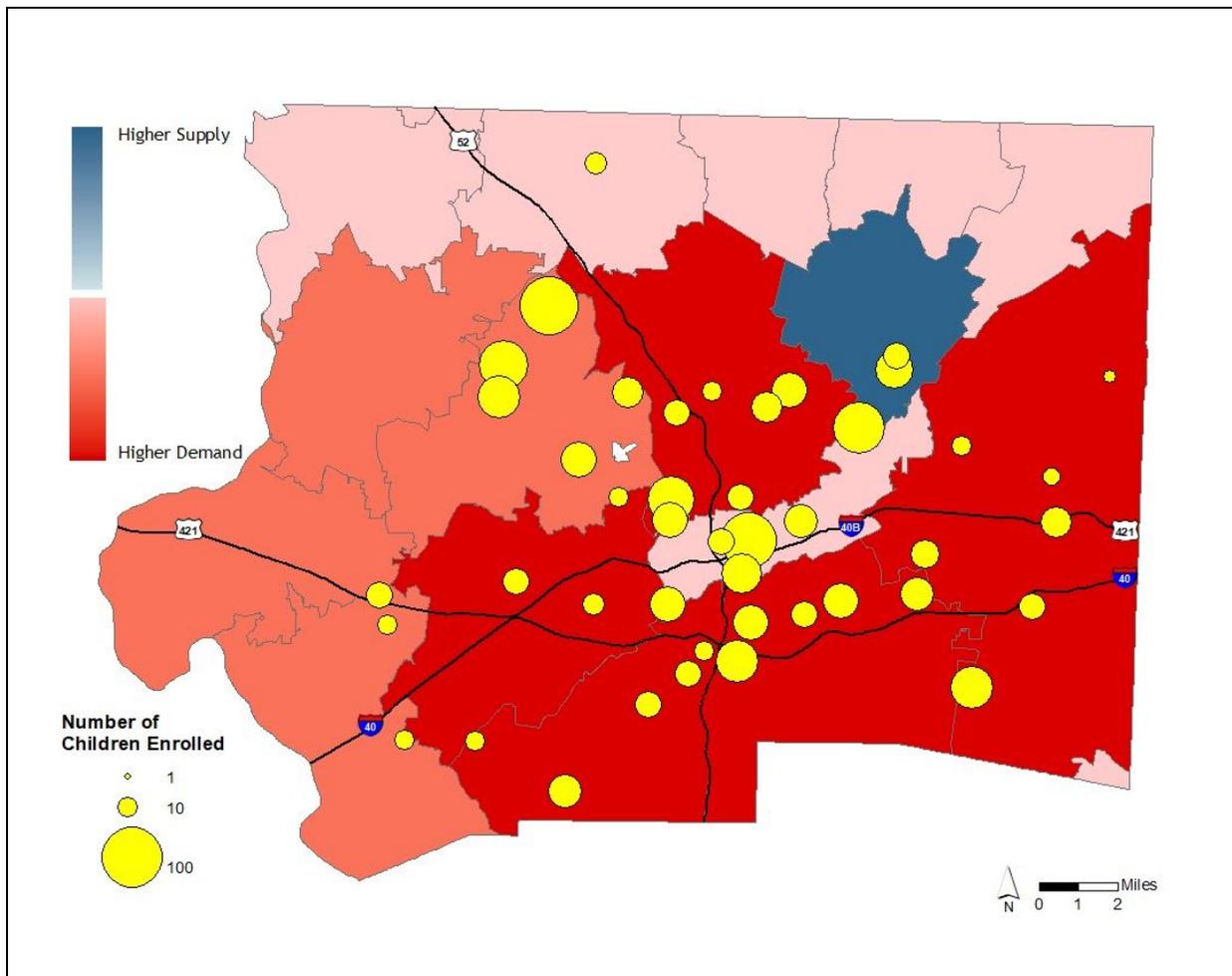


Winston-Salem Forsyth County Schools Department of School Assignment

The map above shows that when including all facility types - schools, HeadStart facilities, private centers, and half day programs - there is the greatest deficit of children enrolled in the 27105 and 27107 when comparing to the background estimates of four-year-olds living in those ZIP codes.

To get a better sense of where there is the greatest demand of public Pre-K classrooms, the map below includes just the enrollment of four-year-olds in publicly funded classrooms minus the estimated number of four-year-olds living in that same ZIP code. Similar to the map above, red indicates higher demand and blue indicates higher supply. The yellow circles are the location of the publicly funded classrooms and the circles are proportional to the number of four-year-old children enrolled. The areas with the highest potential mismatch of supply and demand, with demand exceeding supply, were the 27105, 27103, 27127, 27107, and 27284. Of note as well is that almost every ZIP code had greater demand than the existing supply of public Pre-K classrooms.

Supply and Demand Matching with Publicly Funded Pre-K Facilities

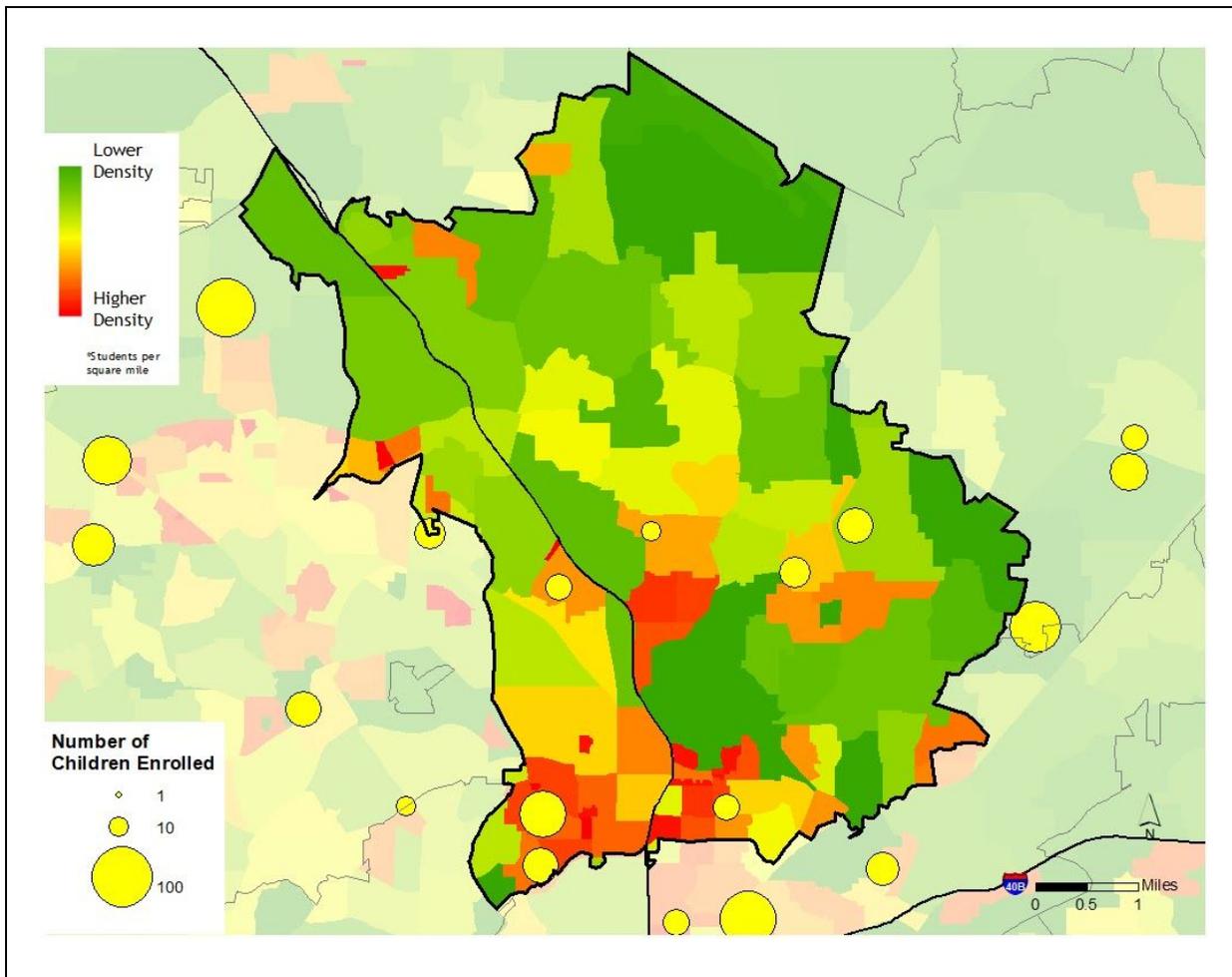


Winston-Salem Forsyth County Schools Department of School Assignment

The areas with the highest potential mismatch of supply and demand, with demand exceeding supply, were the 27105, 27103, 27127, 27107, and 27284. Of note as well is that almost every ZIP code had greater demand than the existing supply of public Pre-K classrooms.

The following maps provide a zoomed in view of the ZIP codes where there is the highest level of demand exceeding supply (27105, 27104, 27103, 27127, 27107, and 27284). The maps display the estimated population density of where four-year-old children live and the location of the publicly funded classrooms (yellow circles). The size of the yellow circles is proportional to the number of children enrolled at that site.

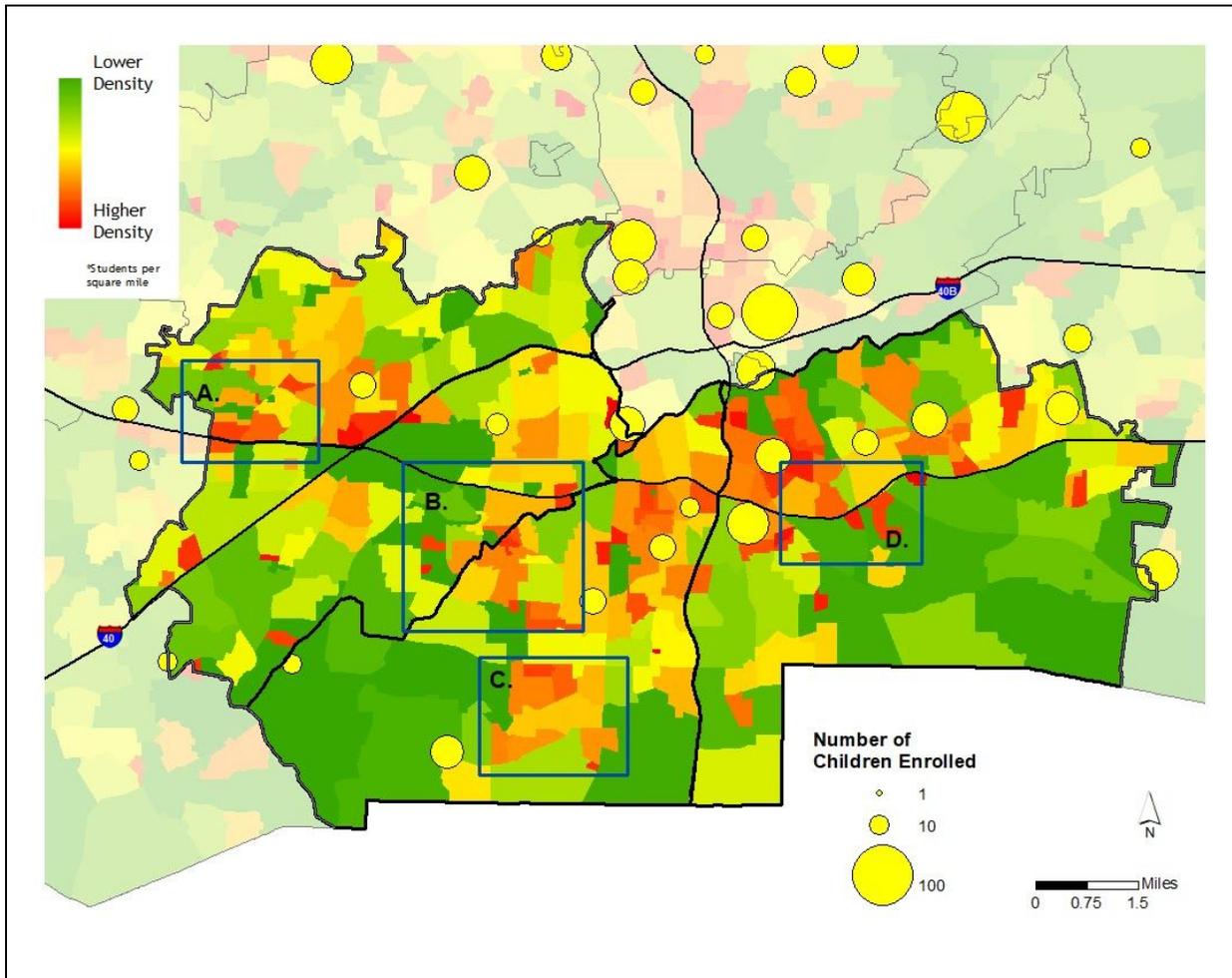
Estimated Population Density of Four-Year Old Children in the 27105 ZIP Code and Publicly Funded Pre-K Facilities



Winston-Salem Forsyth County Schools Department of School Assignment

Areas that are worth considering for classroom placement would be where there is a high density of estimated four-year-olds and there is not a facility nearby. A few areas were further highlighted that met this criteria, and further detail, including roads, is provided for reference.

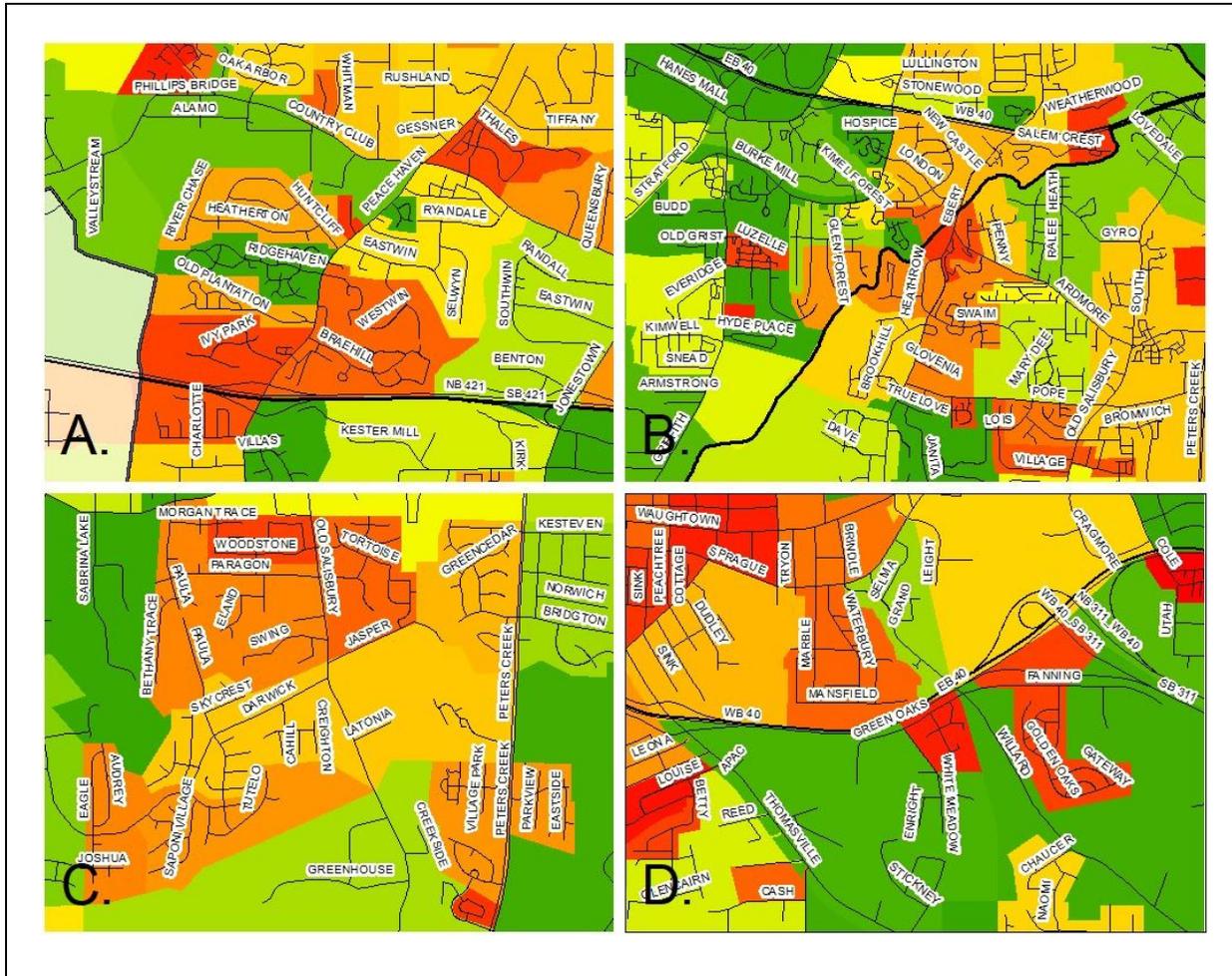
Estimated Population Density of Four-Year Old Children in the 27103, 27104, 27127, and 27107 ZIP Codes and Publicly Funded Pre-K Facilities



Winston-Salem Forsyth County Schools Department of School Assignment

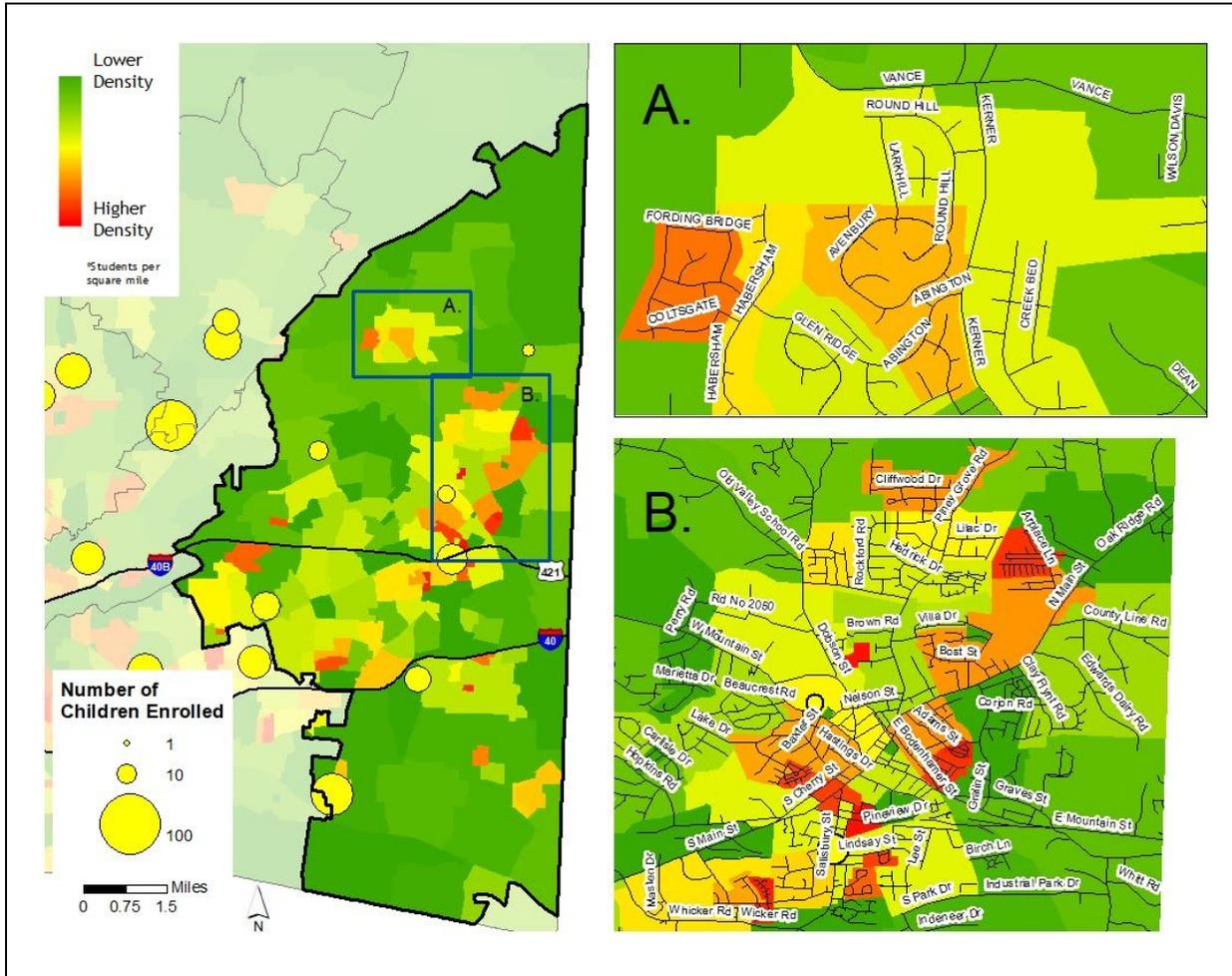
The next map highlights select high density neighborhoods in the 27103, 27104, 27127, and 27107 ZIP codes. The boxes with letters correspond to areas that have high estimated four-year-old population density and do not have publicly funded Pre-K classrooms in the immediate area. The following maps give a more zoomed in view of the highlighted areas..

High Potential Areas for Publicly Funded Pre-K Facilities



Winston-Salem Forsyth County Schools Department of School Assignment

Estimated Population Density of Four-Year Old Children in the 27284 ZIP Codes and Publicly Funded Pre-K Facilities



Winston-Salem Forsyth County Schools Department of School Assignment

Conclusions: Ideal Locations for New Expansion

To assess areas with the greatest demand for additional Pre-K/preschool classrooms, the estimated four-year population density was subtracted from the number of four-year-old children enrolled in facilities in the same ZIP codes.

When considering all types of facilities that have four-year-old children enrolled, the ZIP codes that had the largest excess of demand over supply were the 27105 and 27107 ZIP codes. Upon further refining the Pre-K/preschool facilities to just include publicly funded classrooms, the areas with the greatest excess of demand over supply were the 27105, 27103, 27127, 27107, and 27284 ZIP codes or the East Winston, areas south of business 40, the intersection of business 40 and Interstate 40, and the Kernersville areas north of business 40.

Quality

The Pre-K Priority has created a “Quality Pre-K Checklist” that describes quality Pre-K education as including the following standards:

- *“Well-implemented, comprehensive early learning standards that include social and emotional aspects within an evidence-based and state-approved curriculum that addresses the whole child*
 - *Differences in language, ability, and culture are respected and supported with appropriate practices to help children thrive*
- *Lead Teachers have a bachelor’s degree and specialized training in a Pre-K area Assistant Teachers hold an associate degree or child Development Associate Credential™ (CDA)*
 - *All teachers receive in-service training and professional development (minimum 15 hours per year) and have ongoing coaching and mentoring*
 - *All credentialed and licensed teachers are compensated within an equitable system regardless of program location*
- *Ongoing Assessments and Evaluations Conducted for Children, Teachers, Program, and Program Setting*
 - *Children receive screenings, referral and support services for vision, hearing, dental, as well as, physical and mental health*
 - *Established systems hold individual classrooms accountable and monitor to ensure quality standards are being met*
 - *Ongoing monitoring of sites to confirm adherence to program standards*
- *Classroom Setting and Overall Environment*
 - *Sites have a 4- or 5-Star Quality Rating based on NC State Licensing Standards*
 - *Maximum class size is 20 or fewer*
 - *Staff to child ratio is 1:10 or less*
 - *Minimum of 6.5-hour day of instruction for children*
 - *Children are provided at least one nutritious meal per day*
- *Parent and family engagement are incorporated in meaningful ways to support the child’s growth and family vitality, while respecting and honoring cultural aspects and learning differences.”*

Parents’ evaluation of the importance of these quality standards can be found on page 72, and the following sections include details on providers’ assessments of these quality standards and willingness and ability to meet them.

Provider's Willingness and Ability to Meet Pre-K Priority Standards

The following section provides an overview of Forsyth County's providers' willingness and ability to meet the quality standards described by the Pre-K Priority.

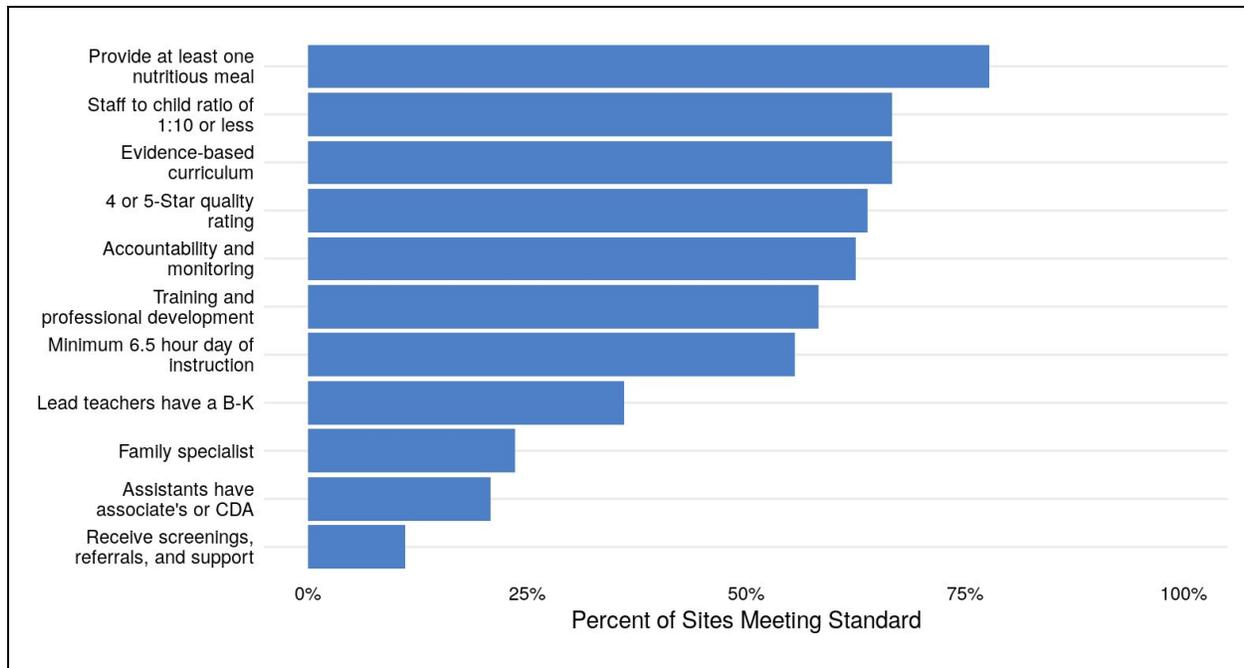
Number of Programs Willing and Able to Meet Quality Standards

This section provides a general overview of the number of Forsyth County Pre-K programs that are willing and/or able to meet the quality standards described by the Pre-K Priority.

In qualitative interviews with program administrators, many administrators expressed that they thought that most of the programs in Forsyth County were either meeting the Pre-K Priority's quality standards or that they could easily meet them. In contrast, one respondent indicated that they did not think that programs in Forsyth County were meeting those standards or could easily meet those standards.

In the provider survey, no sites are currently meeting all of the Pre-K Priority's quality standards, and no sites reported being willing to meet all of the standards without additional resources or supports. This included both private sites and school system sites. About 57% of providers, currently serving about 55% of 4-year-old students, were willing and able to meet all of the standards if additional supports were provided. This includes providers currently meeting standards, providers not currently meeting standards but willing and able to meet standards without additional resources, and providers only willing and able to meet standards if additional resources or supports were made available.

Percent of Sites Currently Meeting Each Pre-K Priority Standard

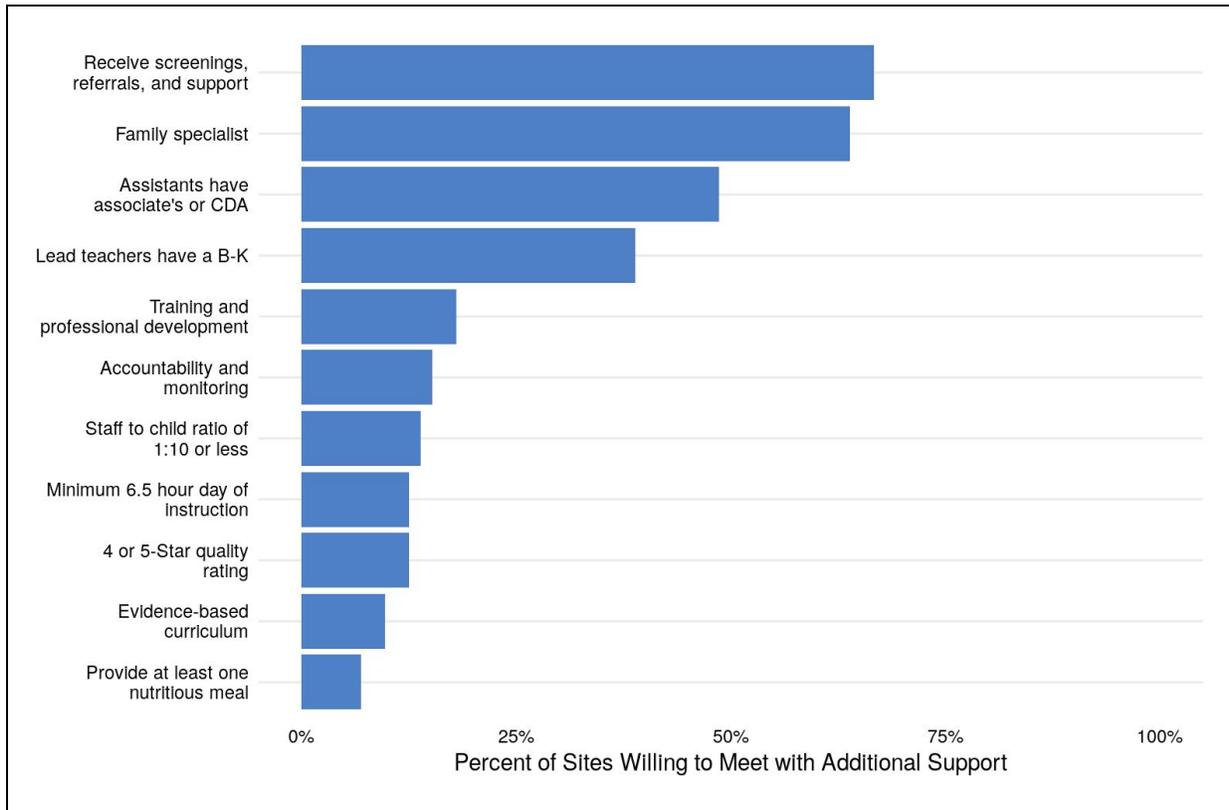


Forsyth Futures' Provider Survey

The Pre-K Priority quality standard most commonly met by sites participating in the provider survey was the provision of at least one nutritious meal a day, with about 78% of providers reporting meeting this standard. The majority of providers also reported having staff to child ratios of 1:10 or less, using an evidence-based curriculum, having a 4- or 5-Star quality rating, having accountability and monitoring, providing training and professional development, and having a minimum of 6.5 hours a day of instruction. All lead teachers having a B-K license, the provision of a family specialist, having assistant teachers have an associate's degree or CDA, and offering screenings, referrals, and support were less common among survey respondents, with only 11% of respondents reporting that the currently provided all of the screenings, referrals, and supports described by the Pre-K Priority standards.

The majority of 4-year-old children accounted for in the provider survey are at facilities that meet the Pre-K Priority quality standards for staff to child ratios, evidence-based curriculum, nutritious meals, accountability and monitoring, training and professional development, quality rating, and length of instruction. About half of 4-year-old children are at sites that have all lead teachers with a B-K license. And, a quarter or less of children are at sites that meet the Pre-K Priority standards for assistant teacher education, support from a family specialist, and screenings, referrals and support.

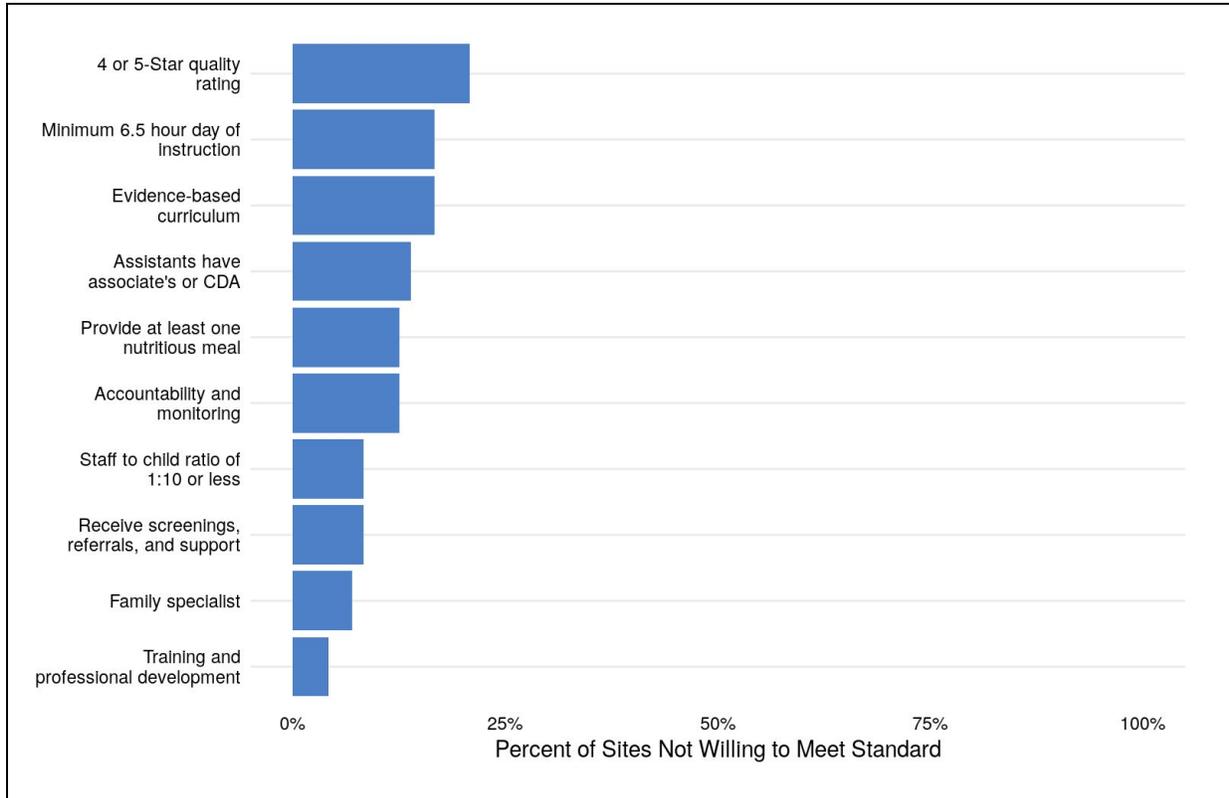
Percent of Sites Willing and/or Able to Meet Each Pre-K Priority Standard only with Additional Resources



Forsyth Futures' Provider Survey

The quality standards around screenings, referrals, and support and the family specialist were the two standards around which the most providers would need additional resources or supports with 67% and 64% of providers reporting needing these supports respectively. All assistant teachers having an associate's degree or CDA and all lead teachers having a B-K license were also standards that providers commonly reported needing support to meet with about 49% and 39% of sites reporting needing support respectively.

Percent of Sites not Willing or Able to Meet Each Pre-K Priority Standard



Forsyth Futures' Provider Survey

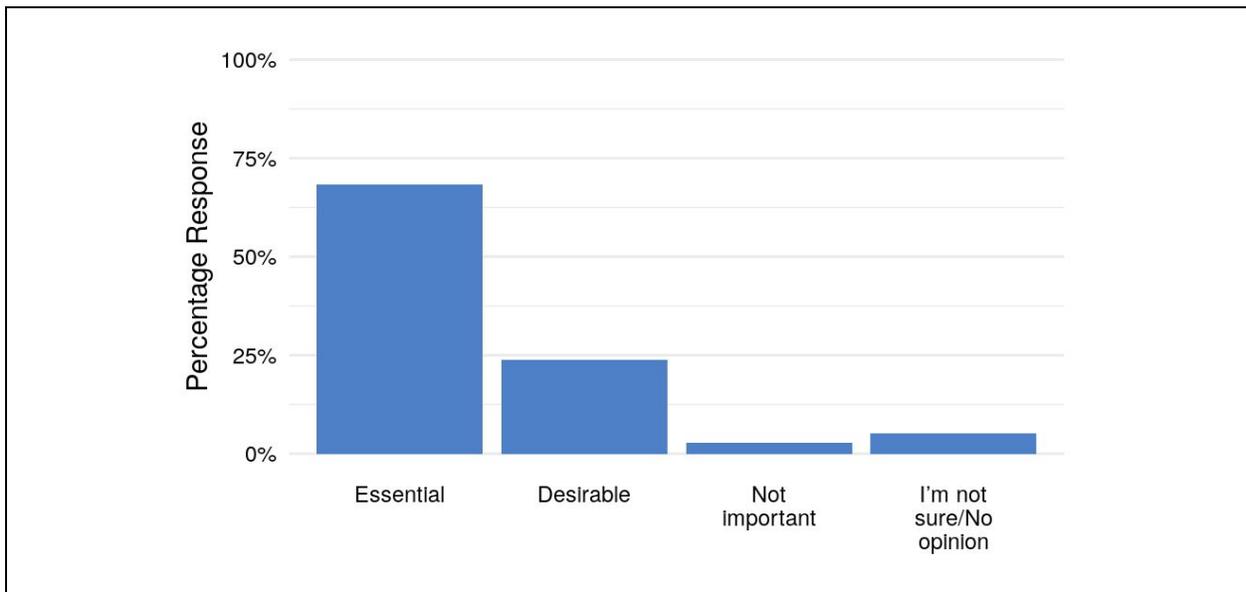
The standard that providers responding to the survey most commonly identified as a standard that they would not be willing or able to meet even if additional resources or supports were made available was having a 4- or 5-Star license. About 21% of sites reported not being able to meet this standard. It was followed by having a 6.5 hour day of instruction and providing an evidence-based curriculum, which about 17% of sites reported not being able to do. Sites that are not willing or able to provide a minimum 6.5 hour day of instruction or be a 4- or 5-star licensed site served the largest share of children reported in this survey with sites not willing or able to meet these standards serving about 29% of children accounted for in the survey. This was followed by sites not willing or able to provide at least one nutritious meal a day, which served 24% of children reported in the survey.

Evidence-Based Curriculum

This section examines parents' and providers' perspectives on the evidence-based curriculum standard. It looks at parents' preference for the standard and providers' willingness to support the standard.

Parents' Preferences for Evidence-Based Curriculum

Parent Preference for Evidence-Based Curriculum



Forsyth Futures' Parent/Caregiver Survey

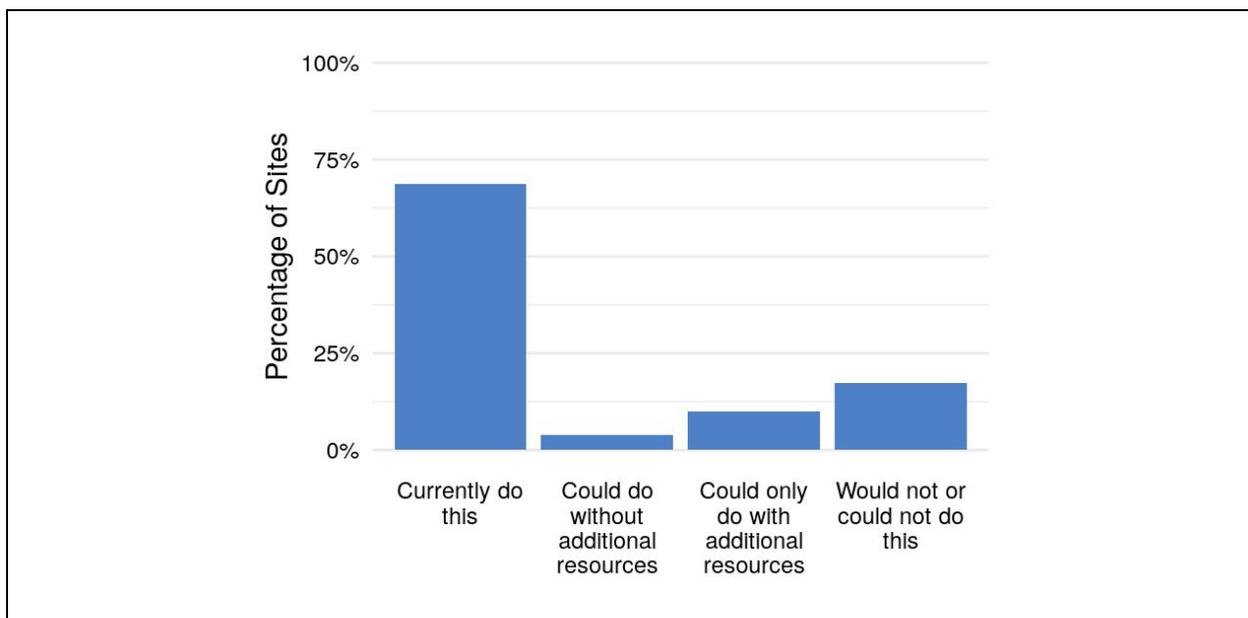
About 68% of parents reported that evidence-based curriculum at a Pre-K/preschool setting was essential and about 24% reported it was desirable, while only about 3% reported it was not important.

Providers' Willingness to Meet the Standard

Providers Willing and Able to Have Evidence-Based Curriculum

Percent of providers responding to the provider survey that described the extent to which they are willing and able to have evidence-based and state approved curriculum:

- “My program currently does this.
- My program does not currently do this, but my program would and could do this without additional resources or supports.
- My program does not currently do this, and my program would and could do this only with additional resources or supports.
- My program does not currently do this, and my program would not or could not do this.”



Forsyth Futures' Provider Survey

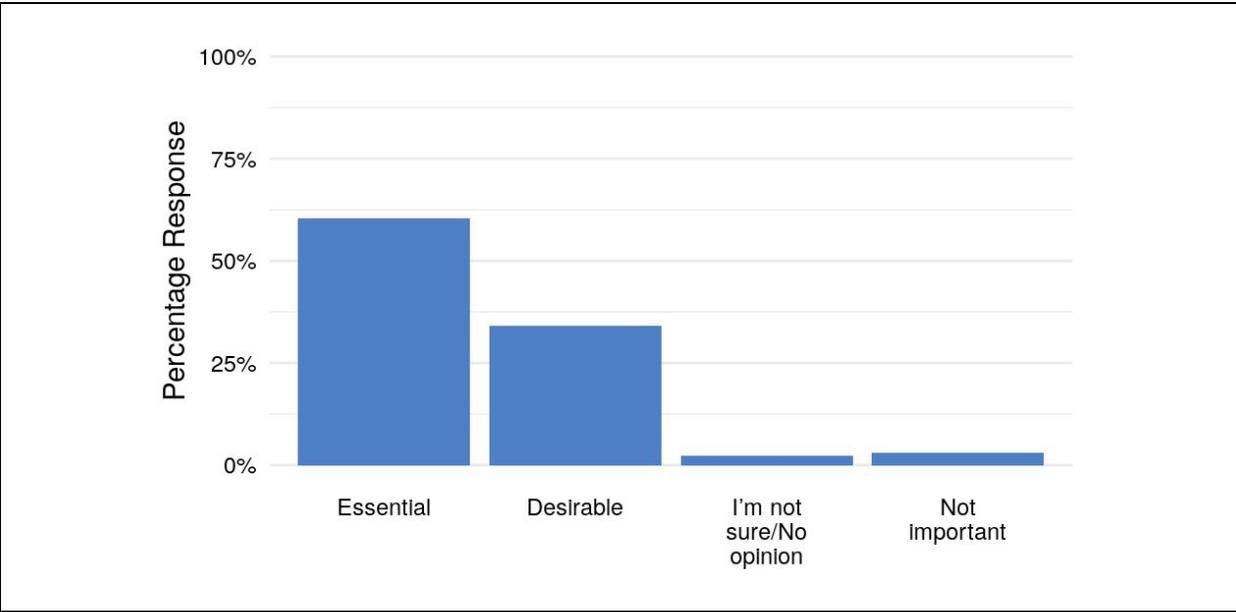
About 69% of providers reported that they already do evidence-based curriculum. Of those providers that did not report already doing evidence-based curriculum, 4% could do it without additional resources, 10% could only do it with additional resources, and 17% would not or could not do evidence-based curriculum.

In provider interviews, evidence-based curriculum was most often raised as a barrier by programs that were not licensed. Other respondents noted that evidence-based curriculum was a requirement for four- and five-star licensure, but that it was not always carefully monitored or enforced.

Lead Teachers Have a Bachelor’s Degree and Specialized Training in a Pre-K Area

Families’ Preferences

Parent Preference for a Lead Teacher with a Bachelor’s Degree and Specialized Training



Forsyth Futures’ Parent/Caregiver Survey

In the Parent Survey about 60% of parents described a lead teacher having a bachelor’s degree and specialized training in a Pre-K area as “essential”, and an additional 34% described it as “desirable”. While only 3% of parents described this quality standard as “not important”.

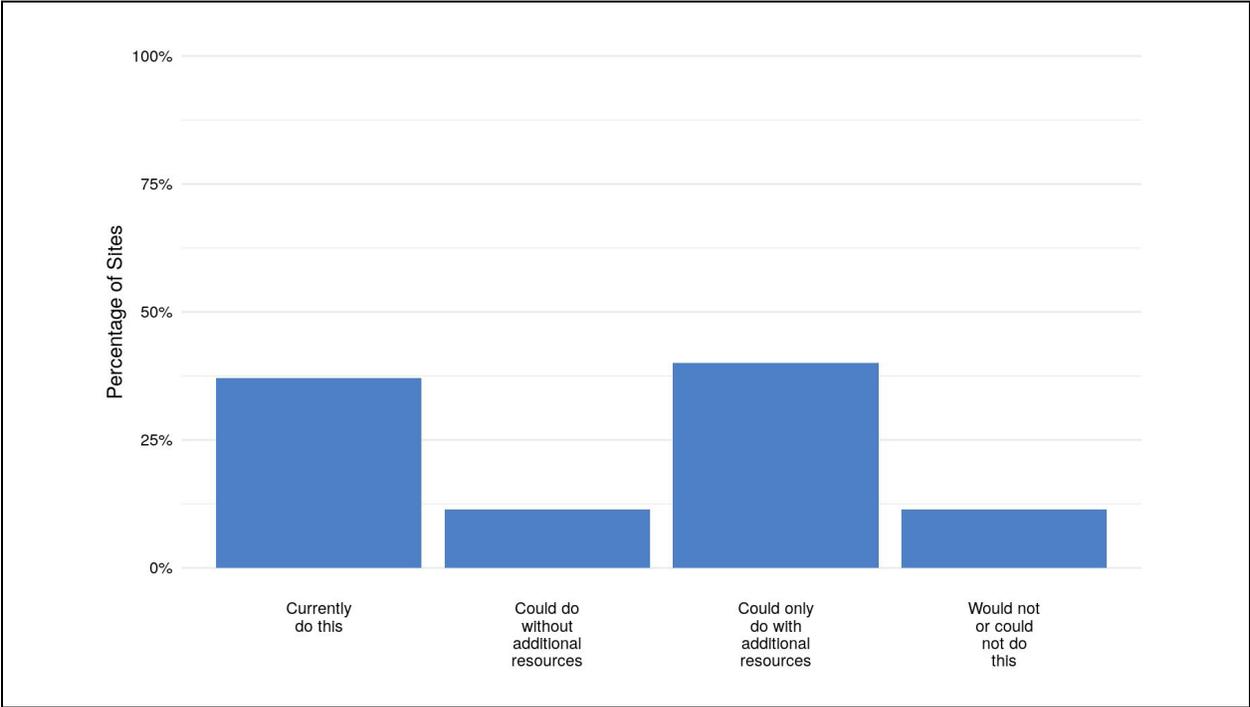
Focus groups and interviews also indicated that teacher education was important. In interviews with parents, parents described staff education, teaching, and training as being important to how satisfied they were with their child’s early education settings. Participants in parent focus groups described well trained or educated staff as a part of how they would define a high quality educational setting for 4-year-olds and a factor that would influence their decision to enroll their children in Pre-K. Though, parent interviews and focus group feedback was not necessarily specific to lead teachers or to a specific level of education.

Provider Willingness and Ability to Have Lead Teachers Have a Bachelor’s Degree and Specialized Training in a Pre-K Area

Percent of Providers Willing and Able to Have All Lead Teachers in 4-Year-Old Classrooms have a BK license

Percent of providers responding to the provider survey that described the extent to which they are willing and able to have all lead teachers in 4-year-old classrooms have a B-K license as:

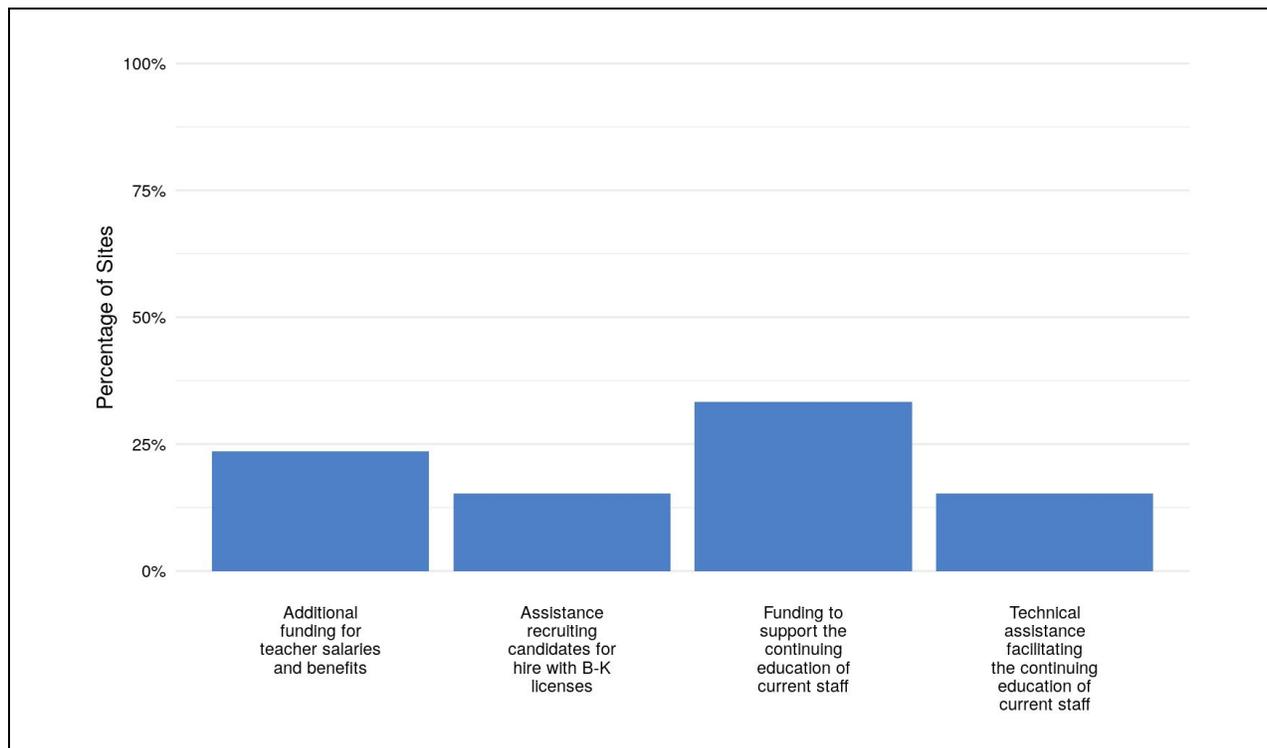
- “My program currently does this.
- My program does not currently do this, but my program would and could do this without additional resources or supports.
- My program does not currently do this, and my program would and could do this only with additional resources or supports.
- My program does not currently do this, and my program would not or could not do this.”



Forsyth Futures’ Provider Survey

The majority of sites participating in the Provider Survey reported that they would be willing and able to have all of the lead teachers in their 4-year-old classrooms have B-K licenses, though some of them would need additional support or resources. About 37% of providers reported currently meeting the standard; about 11% of sites did not meet this standard, but could do so without additional resource; and an additional 40% of sites could only meet this standard if additional resources or supports were made available. Only about 11% of sites were unable or unwilling to meet this standard.

Supports Needed to Have All Have All Lead Teachers in 4-Year-Old Classrooms have a BK license



Forsyth Futures' Provider Survey

Funding to support the continuing education of current staff, additional funding for teacher salaries and benefits, assistance recruiting candidates for hire with B-K licenses, and technical assistance facilitating the continuing education of current staff were all described as supports needed by providers to facilitate all 4-year-old teachers having a B-K license. About 33% of all sites answering the survey described the need for additional funding to support their current staff's continuing education; 24% described a need for funding for salaries and benefits; 15% described a need for assistance recruiting candidates for hire with B-K licenses, and 15% described a need for technical assistance to facilitate the continuing education of their staff. (Sites could select multiple options, but were encouraged to report the minimum level of support they would need to meet the standard.)

The only two reasons given for not being willing or able to have all 4-year-old teachers have a B-K license were current teachers at the site not being willing or able to continue their education to earn a B-K license (6% of all respondents) and difficulty retaining teachers with B-K licenses (only given once). In qualitative interviews with facility administrators, there was a general consensus among respondents that the educational goals of the Pre-K Priority would be difficult to achieve. Some respondents attributed this to the cost of hiring a lead teacher with a B-K license. Some respondents expressed concern that there were not enough teachers with BK licenses available for hire to meet the demands of a potentially expanded Pre-K system. Notably, respondents from the school system generally did not express concern about the ability to hire lead teachers with BK degrees.

Supply of Teachers with B-K Licenses

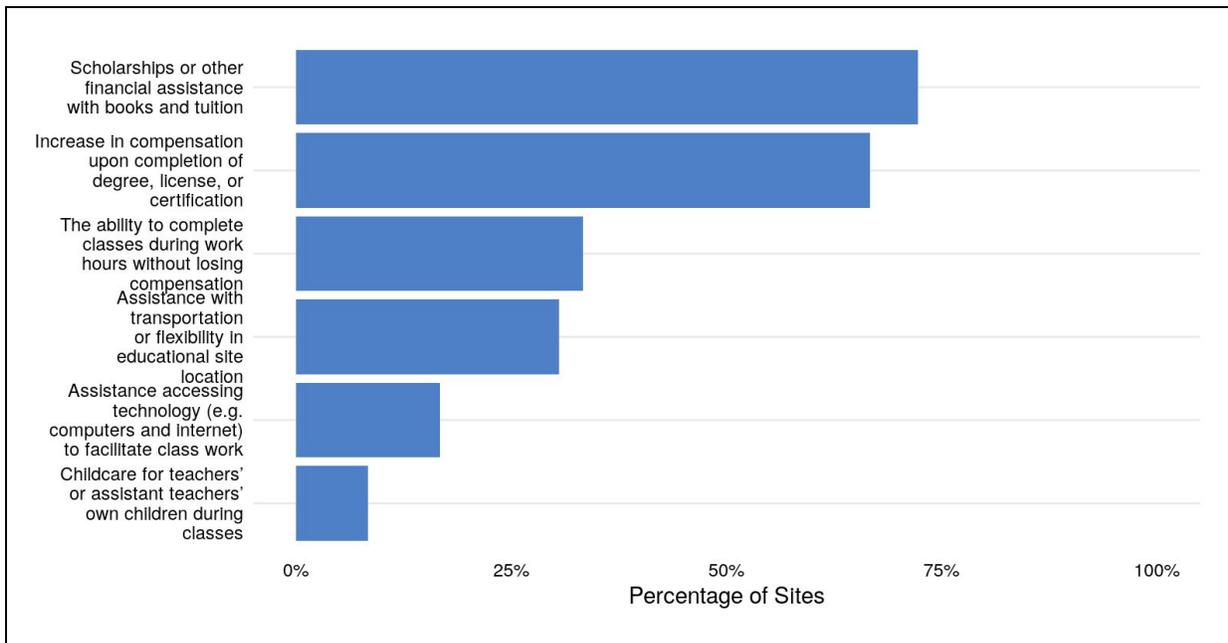
Forsyth Futures researchers estimate that there are about 167 4-year-old teachers in Forsyth County with a BK License. When considering the uncertainty in this estimate, researchers are reasonably sure that the actual number of teachers with B-K licenses teaching four-year-olds is between 96 and 238. To meet the Pre-K Priority's standards around staff to student ratios, an estimated 233 teachers would be needed to teach all 4660 four-year-olds in Forsyth County (in 2018, the most recent estimate). It is possible that Forsyth County has enough teachers with BK licenses currently teaching four-year-olds to meet this demand, but it is more likely that more four-year-old teachers with BK licenses would be needed. In the Forsyth Futures' Provider Survey, providers reported that about 89% of their four-year-old teachers that did not currently have B-K Licenses would likely be willing to continue their educations to earn one if resources were made available to support this.

In qualitative interviews with program administrators, most respondents felt that there were not enough teachers to meet the demand of a potentially expanded Pre-K system, especially if they were required to have BK licenses. Many respondents expressed that incentives, most often financial, would help recruit more potential teachers into the field, and many providers felt that closer coordination with the colleges and universities, especially to connect with potential staff or provide students with hands-on experience would be beneficial to their recruitment.

Teachers' Decision to Continue Education

Factors Motivating or Facilitating Teachers and Assistant Teachers to Continue their Education

Percentage of respondents to the provider survey who identified each factor as motivating or facilitating teachers or assistant teachers who work at their programs to continue their education to meet the levels described by the Pre-K Priority Standards (Respondents could select more than one response.)



Forsyth Futures' Provider Survey

In the provider survey, site administrators most commonly identified scholarships or other financial assistance and increasing compensation as factors that would motivate or facilitate their staff increasing their education to the levels described by the Pre-K Priority quality standards. The ability to complete classes during work without losing compensation and assistance with transportation or flexibility in educational site location were also common responses.

In qualitative interviews with program administrators, administrators noted that limited time outside of work and childcare for their own children were barriers that made it more difficult for current teachers to pursue higher levels of education. Some administrators mentioned flexible hours or the availability of online classes as factors that helped to overcome these barriers, but it was more common that administrators described online classes in particular as an educational format that was not conducive to learning for all students and that not all teachers have access to computers or the internet at home. Administrators also commented that older staff with a lot of experience may be hesitant to return to school to increase their education, especially if they are nearing retirement.

In qualitative interviews with teachers, the most common motivators for pursuing a higher level of education was the desire to improve their teaching skills, which was typically described in the context of teachers wanting to be better prepared to improve student outcomes, and the love of learning or a desire to model the value of learning. Faculty requirements, especially to be a lead teacher, were also commonly described as a motivator, and some respondents described a potential increase in pay, incentives, expanded career possibilities (including the potential to become an administrator), and scholarships as factors that encouraged teachers to pursue higher levels of education. When asked specifically about what motivates teachers to pursue a BK license respondents described the potential to become administrators, an increase in pay, internal drive or personal motivation, demonstrating their professionalism or commitment to the field, and job requirements as factors that encouraged teachers to pursue BK licensure.

When teachers were asked to describe what discourages teachers from pursuing higher levels of education, the cost of education, especially in the context of how much they would be paid after receiving a degree, was the most commonly identified factor. Some respondents also described a lack of time for going back to school, which was sometimes paired with descriptions of how long days can be for early education teachers and/or other obligations outside of work, such as family life. Some respondents described experiences with or concerns about not getting enough of an increase in pay as a result of education to make pursuing more education financially feasible or worthwhile. A few teachers described a lack of interest in pursuing more education, especially among teachers who may not be planning on staying in the field or may not perceive themselves as educators, as something that discourages teachers from pursuing more education.

When teachers were asked about factors that specifically discourage teachers from pursuing a BK license, cost, lack of financial incentives, and time were described as barriers. Teachers concerned about the cost of pursuing a BK often brought this concern up in the context of not being eligible for scholarships that would help defray the cost of pursuing a bachelor's degree. Teachers also described experiences of not being paid for previous increases in education or concerns about being paid the same as they were currently being paid after receiving a BK license. This concern was only raised by teachers that did not currently have a BK license.

When early childhood education instructors at local colleges and universities were asked about increasing the number of teachers with BK licenses, they observed that the licensing process has become lengthy, difficult to navigate, complicated, and very expensive. One instructor mentioned that the academic aspects of increasing education (as opposed to the practice) could be a barrier for teachers lacking experience or skills in this area, which they may not see as being a part of their jobs. Specifically, this instructor mentioned the lack of confidence some students may have in writing and maintaining a certain grade point average. Instructors identified paying students for their practicums, internships, or student teaching assignments as a way that education could be facilitated. They also described the possibility of mentorship, that would include mentoring students who are navigating the licensing process, answering questions they may have about the practical application of best practices, and career exploration as something that could help to increase the number of teachers earning higher education credentials. Instructors identified the provision of substitute teachers to cover current teachers' classroom responsibilities while they are completing education or licensing courses as another factor that would support teachers increasing their education.

When asked specifically about challenges or facilitating factors for teachers currently working in the field to increase their level of education, instructors identified current teachers' potential resistance to changing how they operate in their classrooms, competing priorities - such as family obligations, cost, and a lack of experience in academia as factors that create challenges for current teachers looking to increase their education. Instructors identified teaching techniques that demonstrate how best practices are beneficial to current early childhood education teachers' work as something that could help facilitate current teachers who may be resistant to changing how they operate their classrooms as a factor that could help encourage them to increase their levels of education. They also suggested that students with competing priorities need to know that the time they spend increasing their education will have beneficial outcomes and that it could be helpful if students could spend their practicum hours in their own classrooms. They observed that students currently only have mentor support if they are in particular programs that offer it and recommended that students having a more reliable mentorship program that provides coaching and hands-on support could help facilitate education. Because many students lack experience with academia, it was suggested that education administrators be considerate of previous experience and reconsider program entrance requirements, such as GRE scores.

In qualitative interviews with current students enrolled in B-K programs, students cited a desire and passion for working with children as what influenced their decision to pursue their current degree program. Members of the group also shared personal stories and experiences related to working with children from an early age, an appreciation for working with children during their formative years, as well as individual influences from the community who motivated them to pursue the degree program. Some students identified the convenient locations of their particular institution and the positive reputation of their institution as factors that encouraged them to enroll at that institution specifically.

Current students enrolled in B-K programs described an initial interest in earning a B-K license among themselves and their peers. However, respondents highlighted a shift in interest that occurs among their peers as they matriculate through the degree program. This "shift" seems to result from burnout, undesirable experiences with the exam and course work from peers/classmates, cost of the exam, and having to take the exam multiple times. Individuals expressed having an initial interest in obtaining the degree but eventually opting to move towards a path that would allow them to graduate in a timely manner. There was some discussion related to returning post graduation to obtain a B-K license.

There was shared agreement among current students enrolled in B-K programs that general interest in pursuing a B-K license was decreasing among their peers and the general public. Potential reasons for this decrease suggested were concerns about managing difficult child behaviors in their future careers as teachers, a lack of social support and encouragement while enrolled in the program, and the perception that positions in the early education field are low-paying. There was also limited discussion around the potential for increased interest in the degree when passion or a desire to teach was a driving force for pursuing the degree. And, there was some discussion about the potential pay increase a B-K license might offer or opportunities to teach in the school system once an individual earned a B-K license.

Current students enrolled in B-K programs also described the cost of the program and a lack of understanding of the field going into a licensing program as potential challenges to earning a B-K license. They described funding to support the cost of pursuing the degree and an increase in pay and benefits with the degree as factors that may increase interest in pursuing a B-K license.

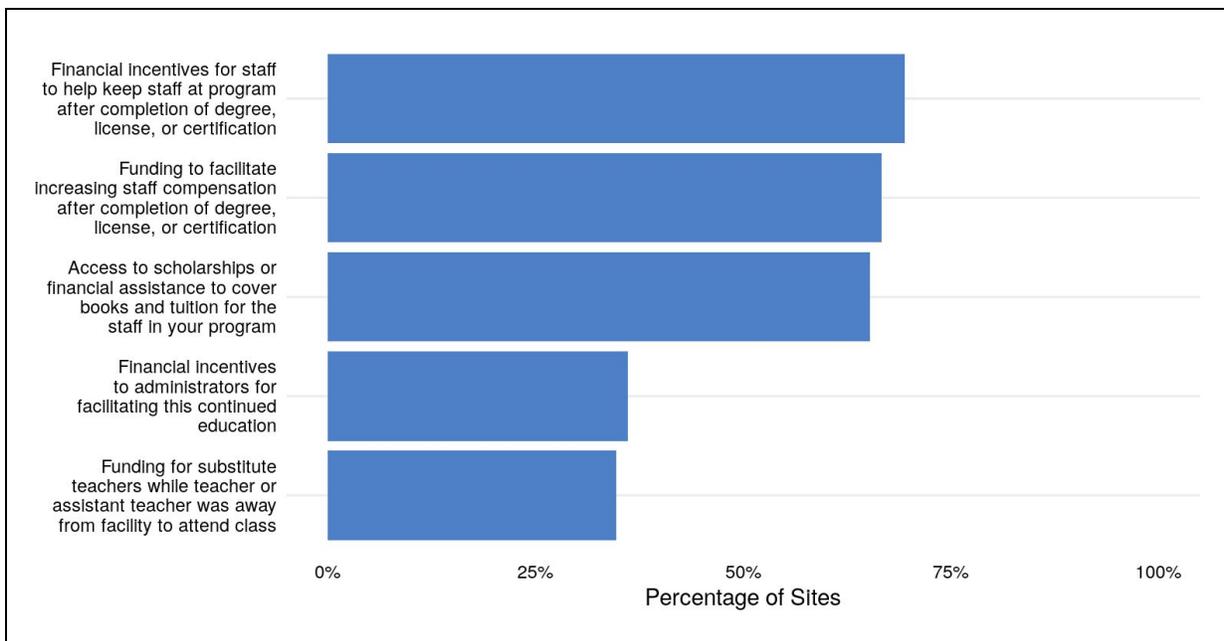
Current students enrolled in B-K programs described access to resources and information, especially instructors meeting students where they are at if they need help with assignments, support from their cohorts, and a supportive department and faculty that allows for one-on-one time with faculty across the department as factors that help support them as they pursue their B-K license. And identified increased field experience during their education and mentorship and encouragement as supports that would help them be successful as teachers.

Among students currently pursuing a CDA, there was limited discussion around their interest in pursuing BK Licensure. Noteworthy discussion related to limited knowledge about the BK License and a desire to have more exposure and be more informed about the license and general process. They described a knowledge of incentives available, incentives (especially pay/wage increases after degree and placement assistance), and career advancement as factors that would encourage their interest in pursuing a BK. One respondent’s perspective of the B-K License focused on the testing component and likened it to other assessments required by educators that teach at the k-12 level. This respondent also highlighted the cost of the test as a deciding factor for individuals who decide to sit for the exam.

Administrators' Support of Teachers' Education

Factors Motivating or Facilitating Site Administrators Supporting Teachers Pursuing Education

Factors that were identified by site administrators participating in the provider survey as motivating or facilitating them supporting teachers or assistant teachers who work at their programs to continue their education to the levels described by the Pre-K Priority quality standards



Forsyth Futures' Provider Survey

The most common factors that site administrators identified in the provider survey as potentially encouraging or facilitating their support of teachers and assistant teachers who were looking to increase their education levels were financial incentives to help retain staff after they increased their education, funding to increase staff compensation, and access to scholarships or financial support for teachers to go back to continue their education.

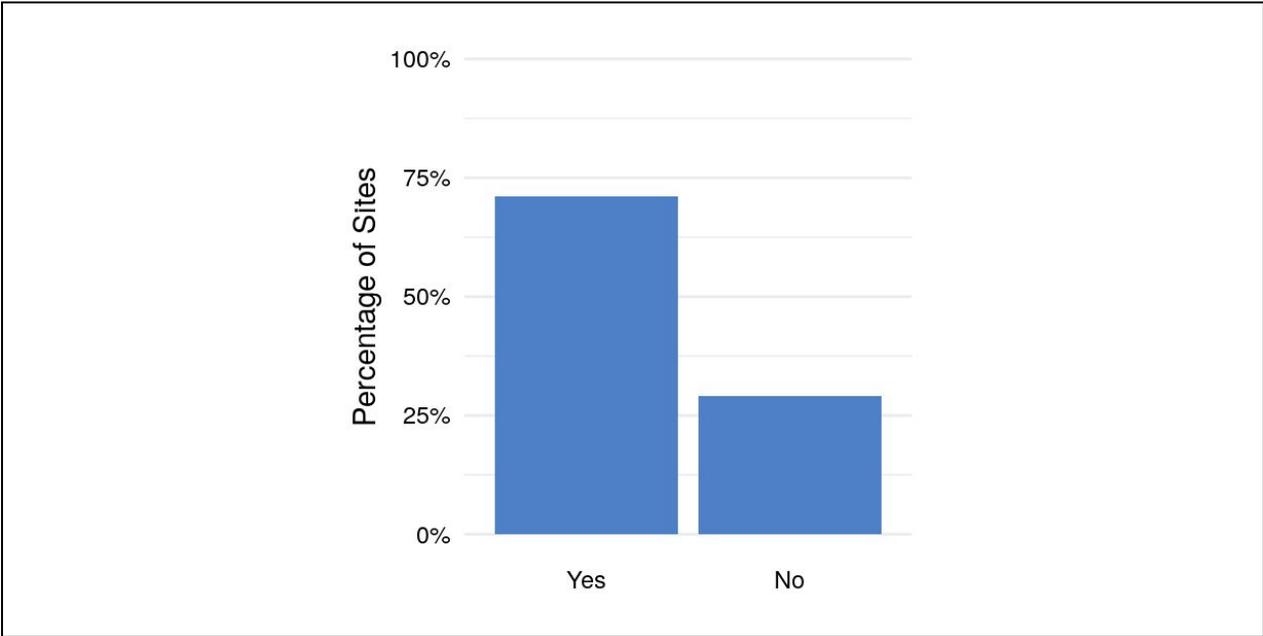
In qualitative interviews with program administrators, some administrators described the cost of providing substitute teachers, especially those at the same level of education, while their teachers were travelling to and taking classes as a barrier to facilitating their staff gaining higher levels of education. A few administrators also commented that their facility not being licensed created a barrier for them in supporting their staff's education because they were not eligible for some resources that help fund continuing education and because their lack of licensure made it difficult for them to justify raising tuition fees to pay staff once they had a higher level of education. Lastly a few administrators expressed concerns that staff who improve their education may not want to stay at their centers or in the early childhood field, which could disincentivize administrators encouraging staff education.

Recruitment and Retention of Teachers with BK Licenses

Teacher recruitment and retention is discussed generally on pages 82-84; this section focuses on the recruitment and retention of teachers with BK licenses and may repeat some of the information from that section.

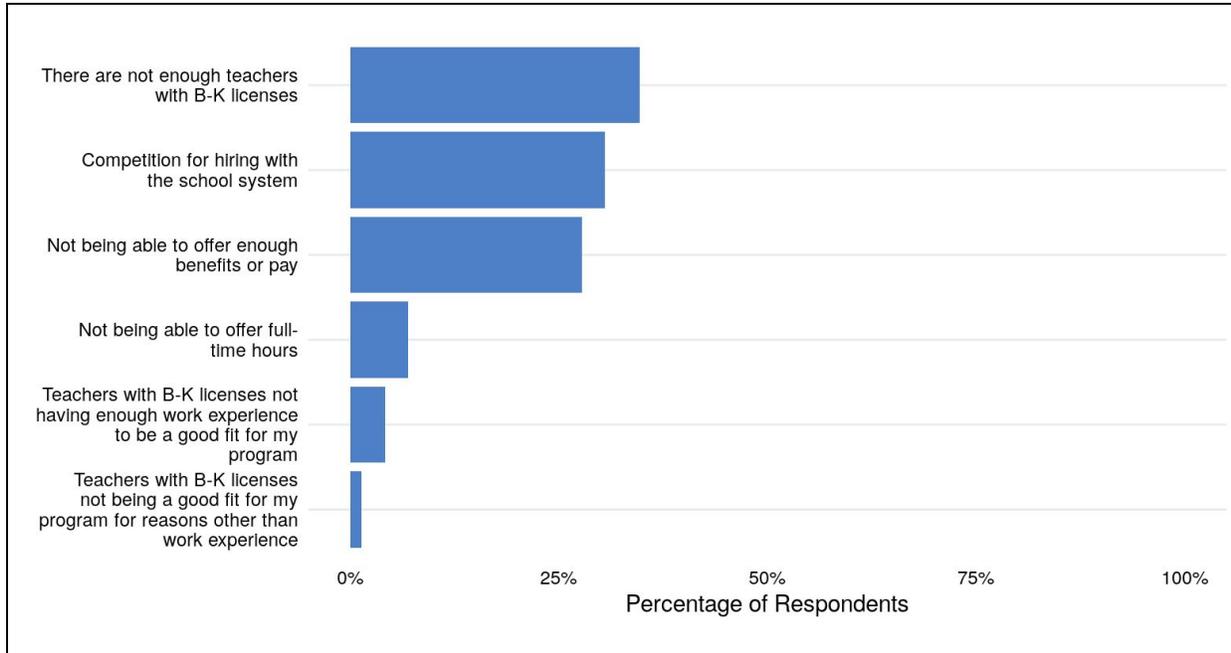
Percentage of Sites Reporting Difficulty Recruiting Teachers with a B-K License

The percentage providers participating in the provider survey that reported experiencing challenges recruiting 4-year-old teachers with a B-K license over the past three years



Forsyth Futures' Provider Survey

Reasons for Challenges Recruiting Teachers with B-K Licenses

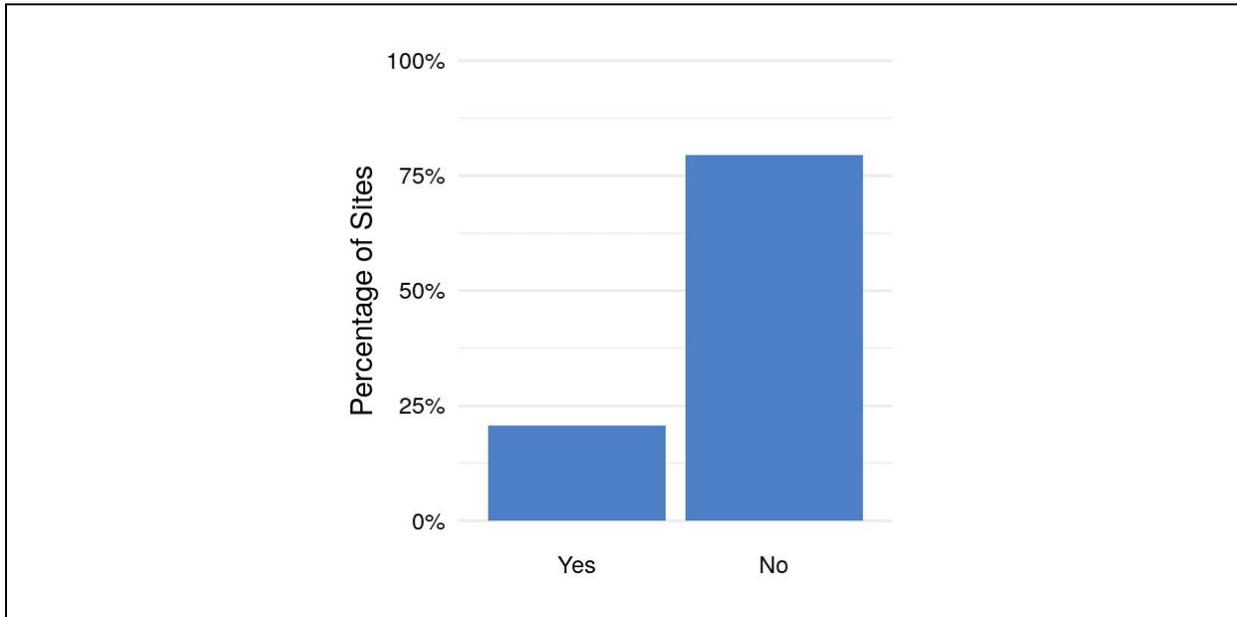


Forsyth Futures' Provider Survey

About 71% of providers participating in the survey reported difficulty recruiting lead teachers with a B-K license for their 4-year-old classrooms. The most common causes of this difficulty reported were a lack of teachers with B-K licenses, competition for hiring with the school system, and not being able to offer enough benefits or pay.

Percentage of Sites Reporting Difficulty Retaining Teachers with a B-K License

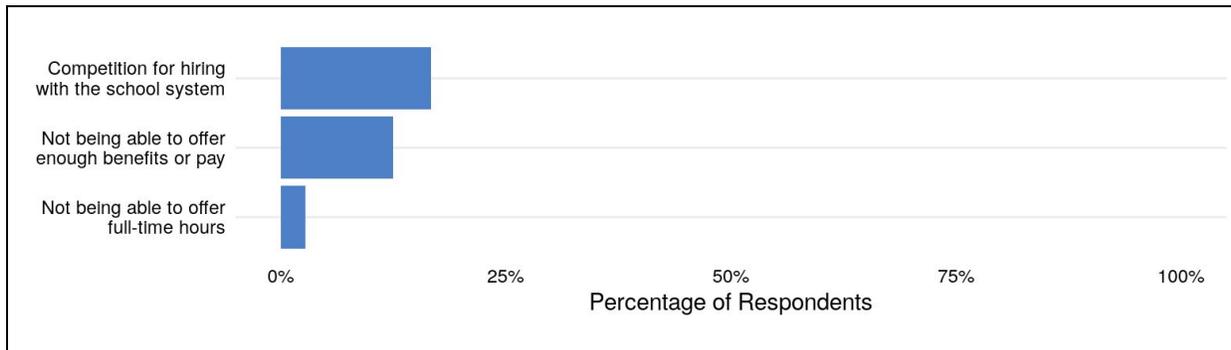
The percentage of providers participating in the provider survey that reported experiencing challenges retaining 4-year-old teachers with a B-K license over the past three years



Forsyth Futures' Provider Survey

Percentage of Sites Reporting Difficulty Retaining Teachers with a B-K License

Reasons for challenges retaining four-year-old teachers with a B-K license described by providers participating in the provider survey



Forsyth Futures' Provider Survey

About 20% of providers participating in the provider survey reported difficulty retaining teachers with a B-K license. The most common causes of this difficulty reported were competition for hiring with the school system and not being able to offer enough benefits or pay.

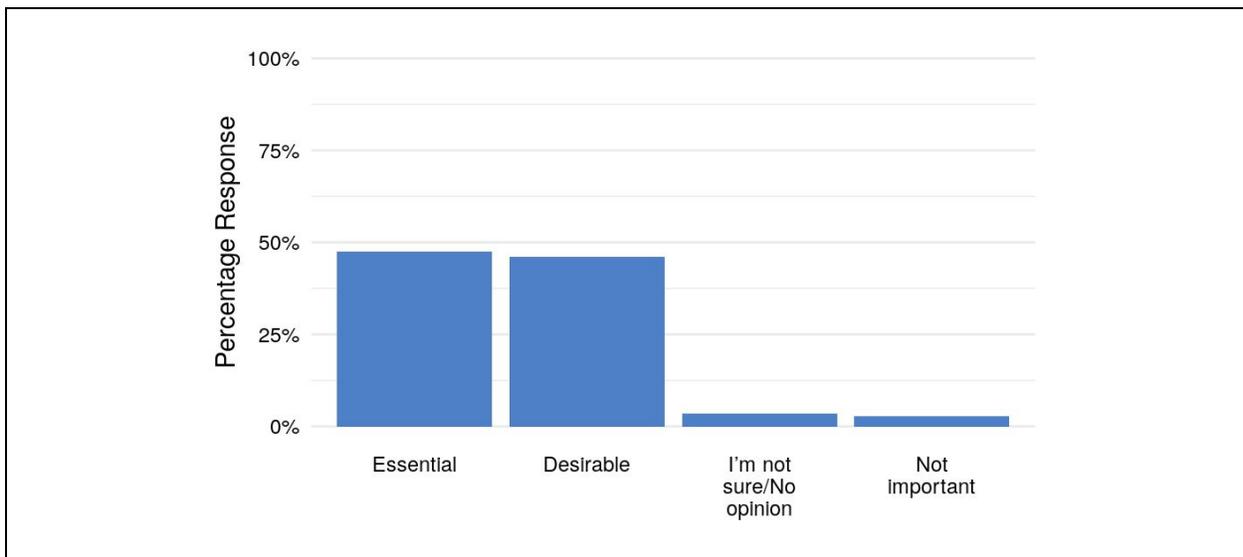
In qualitative interviews, administrators that reported difficulty hiring teachers generally also described hiring teachers with BK licenses as more difficult. There was a consistent perception among providers outside of the school system that competition with the school system made it more difficult to recruit and retain teachers with a BK license. Benefits and pay, including holidays off and the shorter work year, were often mentioned in comparison to the school system, and some school-based providers described the ease of recruiting teachers away from private sites as the reason that they did not have trouble hiring.

Teachers did not frequently discuss factors that influenced the recruitment or retention of teachers with BK licenses specifically. The only factor described that was specific to retention after a teacher had increased their education levels that was described by more than one teacher was pay, specifically a teacher not getting an increase in pay after achieving a higher level of education.

Assistant Teachers Hold an Associate’s Degree or Child Development Associate Credential™ (CDA)

Families’ Preferences

Parent Preference for an Assistant Teacher to Hold an Associate’s Degree or CDA



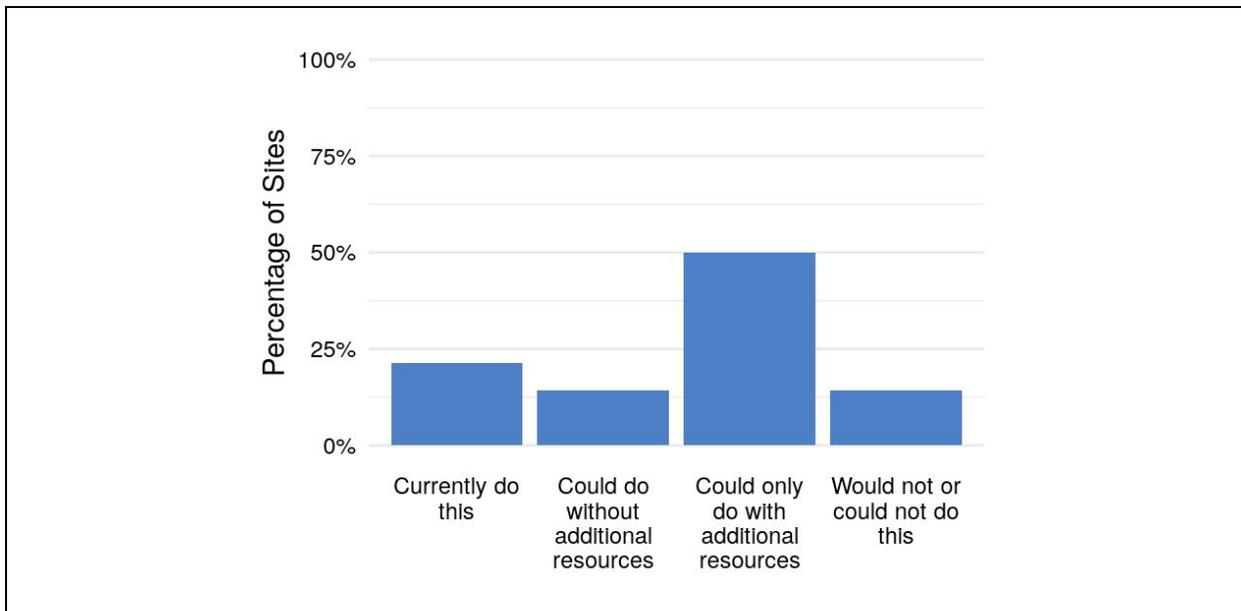
Forsyth Futures’ Parent/Caregiver Survey

Based on the findings from the Parent Survey, Forsyth Futures estimates that about 48% of Forsyth County parents consider an assistant teacher as an “essential” feature of quality Pre-K, and an additional 46% consider it “desirable”. Researchers estimate that only about 3% of Forsyth County parents describe this as “not important”. As was described in [whatever the section on B-K Licensing ends up being called], parents also described teacher education as important in qualitative interviews and focus groups.

Percent of Providers Willing and Able to Have All Assistant Teachers in 4-Year-Old Classrooms have an Associate’s Degree or CDA

Percent of providers responding to the provider survey that described the extent to which they are willing and able to have all assistant teachers in 4-year-old classrooms have an associate’s degree or CDA as:

- “My program currently does this.
- My program does not currently do this, but my program would and could do this without additional resources or supports.
- My program does not currently do this, and my program would and could do this only with additional resources or supports.
- My program does not currently do this, and my program would not or could not do this.”

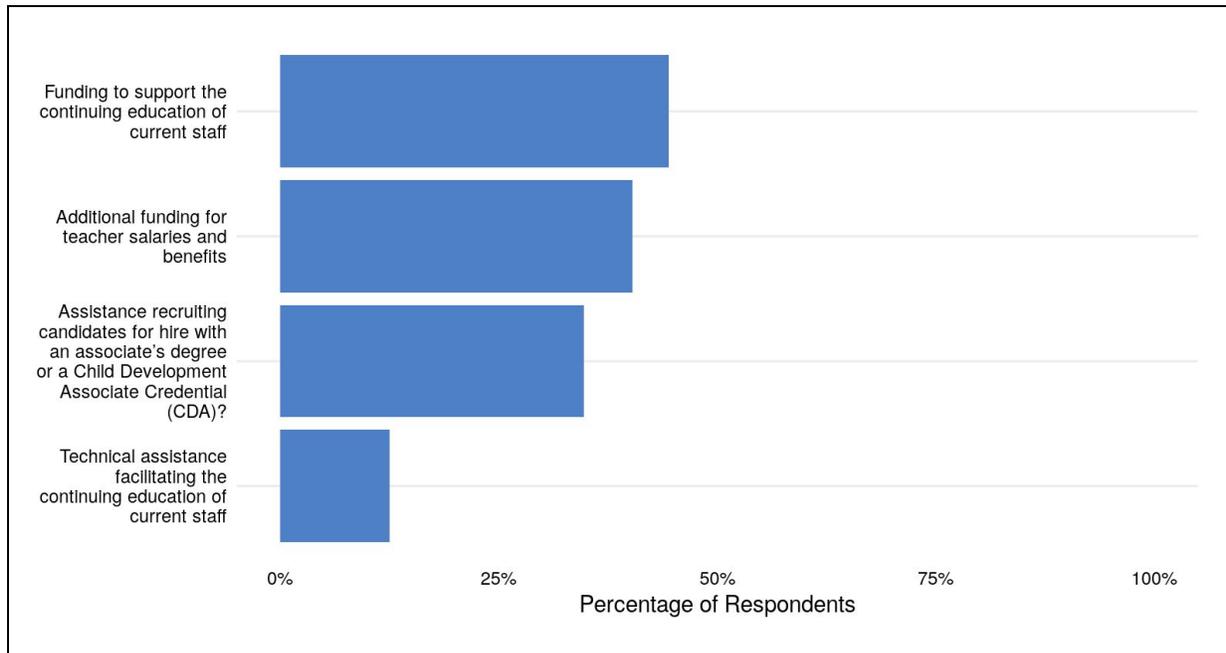


Forsyth Futures’ Provider Survey

About half of childcare sites that responded to the Forsyth Futures survey indicated that they could only have all assistant teachers in 4-year-old classrooms have an associate’s degree or CDA if additional supports or resources were available. About 36% of respondents reported currently meeting this standard or being able to meet this standard without additional resources. Notably, about 14% of respondents reported that they were not able or willing to meet this quality standard, even if additional supports were provided.

Supports Needed to Have All Have All Assistant Teachers in 4-Year-Old Classrooms have an Associate's Degree or CDA

Percentage of Respondents Describing Supports Needed to Have All Assistant Teachers in 4-Year-Old Classrooms have an Associate's Degree or CDA by Kind of Support Needed



Forsyth Futures' Provider Survey

Providers responding to the provider survey reported funding to support the continuing education of current staff, reported by 44% of all responding facilities; additional funding for teacher salaries and benefits, reported by 40% of facilities; and assistance recruiting candidates for hire, reported by 35% of facilities, as the most common supports needed for all assistant teachers in 4-year-old classrooms to have an associate's degree or a CDA.

The only reason that providers responding to the survey gave more than once for why they would be unable or unwilling to meet this quality standard was that assistant teachers in their facility would not be willing or able to continue their education to earn an associate's degree or a CDA, reported by about 4% of respondents.

Supply of Assistant Teachers with Associate's Degrees or CDAs

Based on the results of the provider survey, Forsyth Futures' researchers estimate that there are about 163 assistant teachers that have a CDA, an associate's degree, or higher. To meet the Pre-K Priority's standards around staff to student ratios, an estimated 233 teachers would be needed to teach all 4660

four-year-olds in Forsyth County (in 2018, the most recent estimate). It is likely that more assistant teachers with associate's degrees and CDAs would be necessary to meet these goals. Researchers estimate that about 80% of assistant teachers that do not have an associate's degree or a CDA would be willing to continue their education to reach these levels of education if supports were made available.

Assistant Teachers' Decision to Continue Education

In many cases Forsyth Futures' researchers asked about teachers' and assistant teachers' willingness to increase their education generally or research participants described these together without making clear distinctions between assistant teachers and teachers or earning a BK or earning a CDA. More information on teacher education and factors that influence their educational trajectories can be found in the section on Teachers' Willingness and Ability to Continue their Education (pages 86-88). This section focuses on information specific to factors that encourage or facilitate earning an associate's degree or a CDA.

In qualitative interviews with current associate degree and CDA students, when asked to discuss what influenced them to pursue an associate's degree or CDA in early education, participants stated that access to formal training related to child development, behavior management, parent/family engagement, and opportunities for continuous learning was a deciding factor. In addition to access to education and training, participants also cited access to jobs or an entry point into the field as a motivating factor in pursuing the degree/credential. There was some discussion related to individual job transitions that lead individuals to working in the early education field and later motivated them to pursue a degree credential(s) in early education. Participants also highlighted a passion for working with children and families as a motivating factor for pursuing a degree or credential in early education.

When discussing the interest of their peers or the general community in pursuing an associate's degree or a CDA there was some agreement among respondents that interest in earning an associates or a CDA in early education is stable among students that are already enrolled in an early education program. However, when discussing general interest among peers or the public in earning an associates in early education and or a CDA, there was a general consensus that interest was "low" or decreasing. Potential reasons for that lack of interest included low pay and limited opportunities for professional advancement in the field. The majority of responses to this question related to low prospect for pay or advancement even with a degree. Changes to state regulations and standards for education requirements and a lack of interest in working with kids were also mentioned as factors that would limit interest.

When asked about challenges or obstacles to becoming a Pre-K teacher, students on an associate's or CDA track highlighted the role of pay and wages, limited career advancement, education requirements, and instructor preparedness in behavior/classroom management as a barrier to becoming a Pre-K teacher. When discussing education requirements and required time to earn the degree, respondents cited limited potential for increase in pay or advancement in the field as a challenge, asking "Is it worth it?".

When asked about supports available to students pursuing an associates' degree or CDA, there was general agreement that access to internships, support in finding internships, or opportunities for observation were limited. Respondents acknowledged that internships and hands-on experiences are

vital to their training however, they are often instructed to seek out and secure these opportunities with limited assistance. Individuals also reported limited resources from the degree/certificate programs themselves, with the exception of access to literature and textbooks. Individuals reported some difficulty printing for class assignments and in accessing additional materials for projects. When discussing mentorships respondents reported a shared agreement that access to mentors and mentorship programs are limited. There was some discussion about individual experiences and difficulty seeking out mentors in the field for support and information. Advisors were brought up in discussion, however their role seemed to focus on supporting academic and course advisement. A desire for mentors or a mentorship program was expressed by participants.

When asked to identify potential supports to help them pursue their educational goals, current students in associate's degree and CDA programs identified several ways that they could be better supported in their studies. Students identified a need for mentorship and program support, sometimes noting that they just needed extra help and that mentor support was appreciated to help keep them on the right track. They also identified a need for knowledgeable advisors and for those advisors to provide clarity around program requirements. One respondent also mentioned better access to tutoring in both location and scheduling. Funding and scholarship support were also identified as a need by respondents. Students that are students full time often do not qualify for scholarships, and students described the many requirements of scholarships as a burden. One respondent described a need for scholarship funding to include costs of childcare. Students also generally identified a need for childcare support for their own children, especially since many of their classes are at night.

When asked about the potential challenges to earning an associate's degree or CDA, current students identified several factors including cost, program structure, and time. Respondents described several factors as contributing to the financial burden of being in the program. Students are required to have a background check to do classroom observations which incurs costs associated with the background check and medical costs associated with a TB test and physical. When many students take time off of work to take classes this cuts into their income. The time required for homework also cuts into time in which they could be earning income for their households. Respondents also cited the costs of tuition and books as part of the financial burden of education. Respondents identified hybrid class structures where half of instruction is online and the other half is in person as a challenge because they have to wait to speak with a teacher if they are confused, and they expressed that they would like to meet as a class more often. Students also described the work and time required to take classes and complete assignments and reported that it is difficult to stay motivated. Practicums were also noted as being a significant time commitment. And, some students reported that the timing of classes created challenges because they needed backup at work for classes during work hours or childcare if they were in classes outside of work hours. Students also described the challenges of time management and achieving work/life balance while trying to find time to get school work done while in school full time and working full time while caring for their own children.

When asked to discuss what might attract individuals to pursue an associate's degree or CDA there was shared agreement around the idea of increasing the professional status of the field to impact access to positions, increase in pay and wages, and career advancement. Throughout the focus group discussions, participants discussed experiences where the professional status of early education was questioned or associated with "daycare or playing with children" and how teachers may feel "unappreciated". There seems to be shared agreement that this perception of the field impacts the pay and wages, access to career advancement, and ultimately the attractiveness of both degree programs

and the career field itself. Shifting perspectives about the early education field could potentially make the associate's degree and/or credentials like the CDA more attractive to potential students and future educators.

The potential for pay/wage increase and access to professional opportunities was another more widely discussed factor that participants believed might attract more individuals to pursue an associate's in early education or additional credentials like the CDA. Participants cited stagnant pay and limited career advancement with or without the degree as a factor impacting the attractiveness in earning an associate's degree in early education or additional credentials.

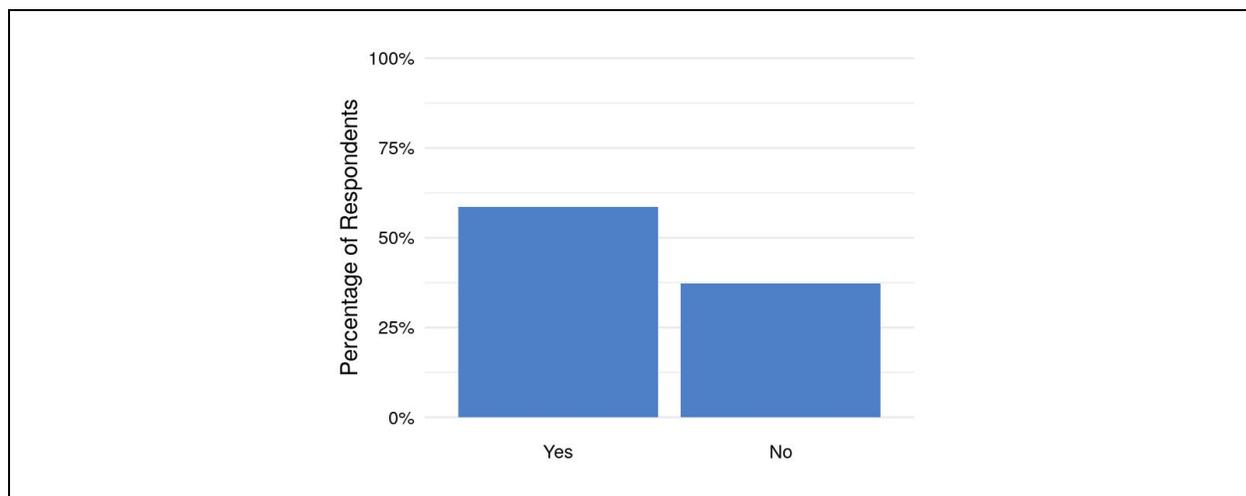
When asked what would help prepare them for the field, current associate's degree and CDA students identified increased field experience, more professional help in their classrooms, and mentorship and encouragement as factors that would help them perform their jobs better.

Recruitment and Retention of Assistant Teachers with Associate's Degrees or CDAs

Teacher recruitment and retention is discussed generally on pages 82-84; this section focuses on the recruitment and retention of assistant teachers with associate's degrees or CDAs and may repeat some of the information from that section.

Percentage of Sites Reporting Difficulty Recruiting Assistant Teachers with an Associate's Degree or a CDA

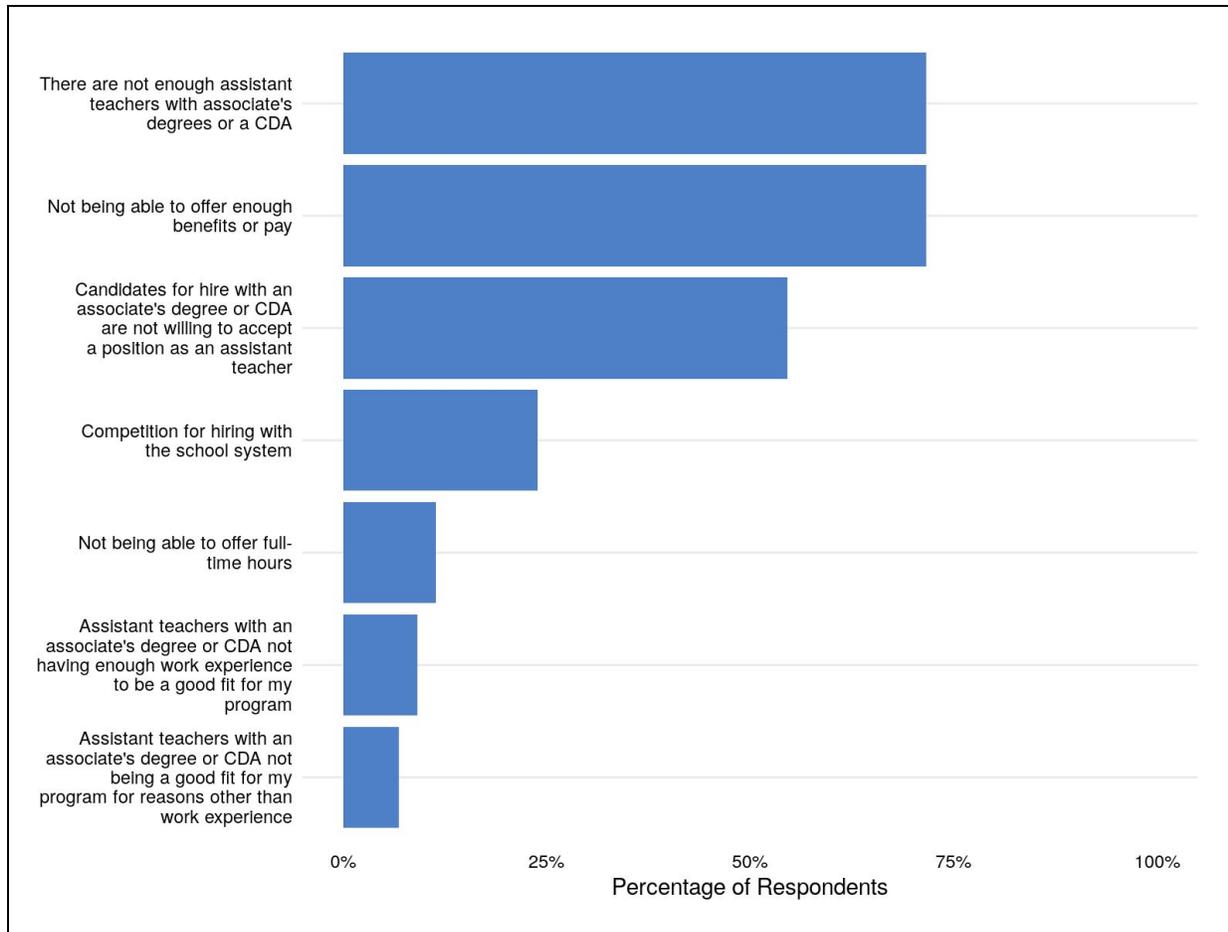
The percentage providers participating in the provider survey that reported experiencing challenges recruiting 4-year-old assistant teachers with an associate's degree or a CDA over the past three years



Forsyth Futures' Provider Survey

Reasons for Challenges Recruiting Assistant Teachers with an Associate's Degree or CDA

Reasons for challenges recruiting 4-year-old assistant teachers with an associate's degree or CDA described by providers participating in the provider survey

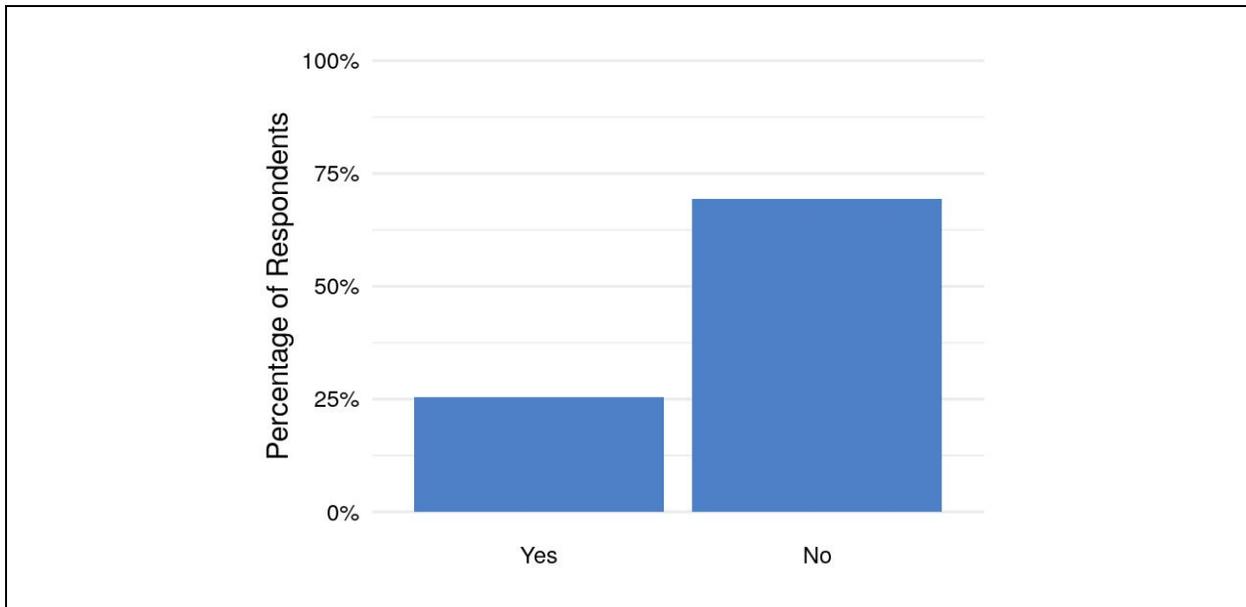


Forsyth Futures' Provider Survey

About 59% of providers responding to the provider survey reported having challenges recruiting assistant teachers with an associate's degree or CDA in the past 3 years. The most common reasons given for this difficulty were a lack of assistant teachers with an associate's degree or CDA, not being able to offer enough benefits or pay, and candidates with associate's degrees or CDAs not being willing to accept a position as an assistant teacher.

Percentage of Sites Reporting Difficulty Retaining Assistant Teachers with an Associate's Degree or CDA

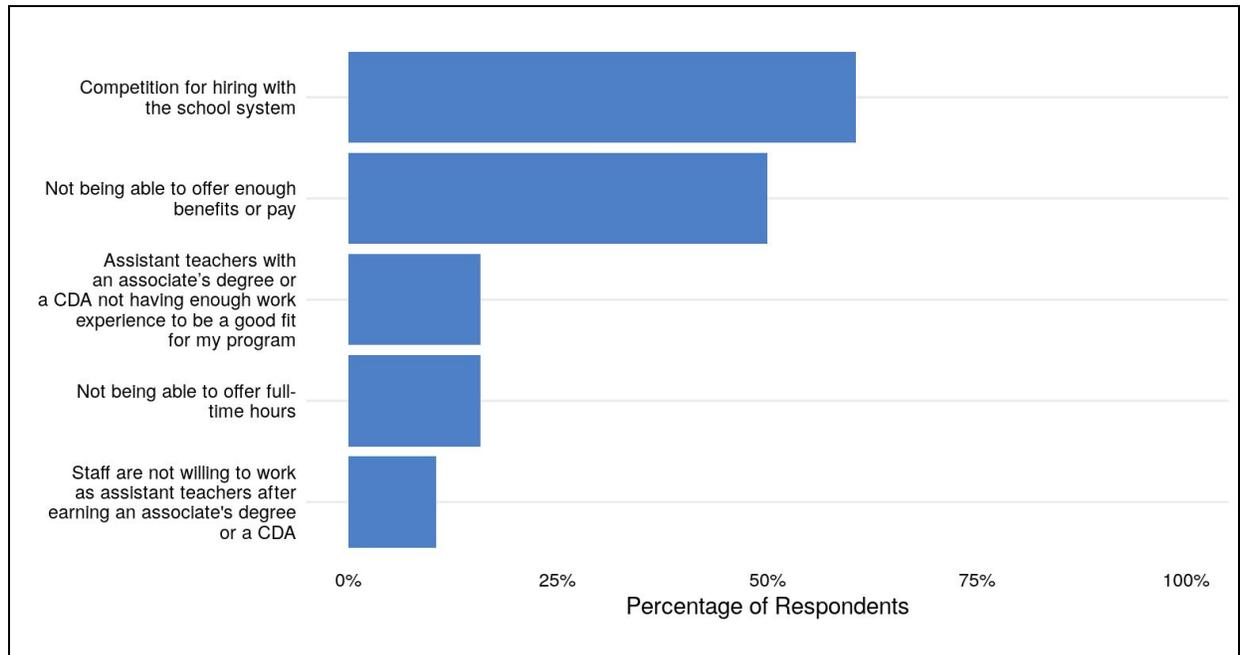
The percentage providers participating in the provider survey that reported experiencing challenges retaining 4-year-old assistant teachers with an associate's degree or CDAs over the past three years



Forsyth Futures' Provider Survey

Percentage of Sites Reporting Difficulty Retaining Assistant Teachers with an Associate's Degree or CDA

Reasons for challenges retaining 4-year-old assistant teachers with an associate's degree or CDA described by providers participating in the provider survey



Forsyth Futures' Provider Survey

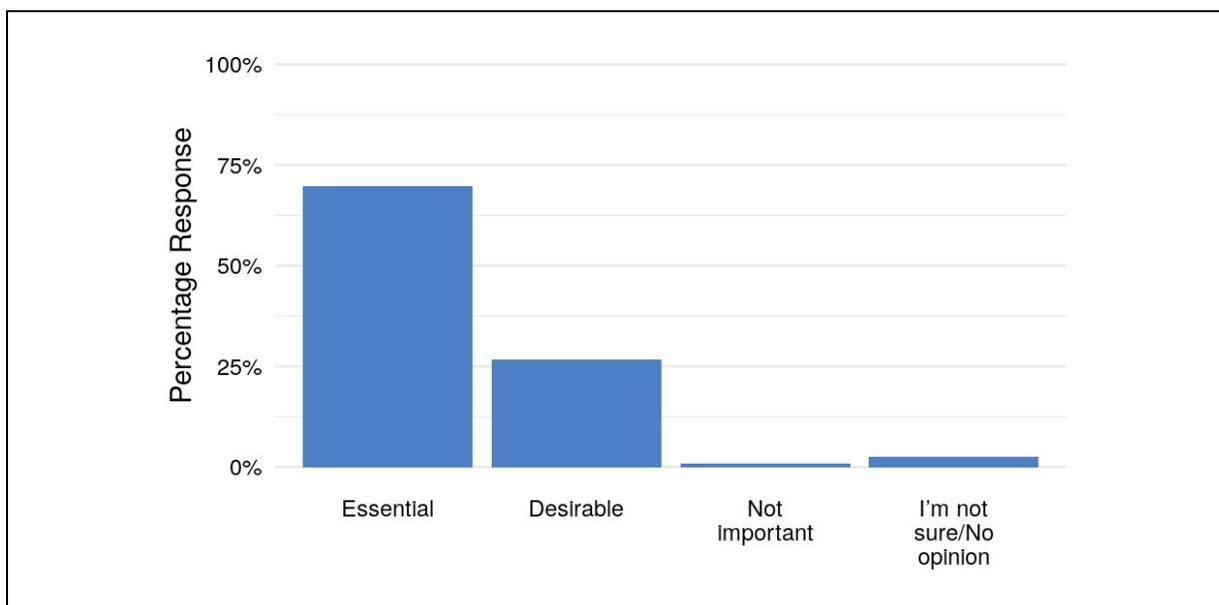
About a quarter of providers responding to the provider survey reported difficulty retaining assistant teachers with an associate's degree or CDA in the past 3 years, and the most common causes of this difficulty reported was competition for hiring with the school system and not being able to offer enough benefits or pay.

Teachers Receive 15 Hours per Year of Professional Development

This section evaluates the quality standard centered on teachers receiving professional development. It looks at both parents' preference for this standard and providers' willingness to offer it.

Parents' Preferences for Teachers Receiving Ongoing Professional Training

Parent preference for teachers receiving ongoing professional training and support



Forsyth Futures' Parent/Caregiver Survey

About 70% of parents reported that teachers receiving ongoing professional training and support was essential and about 27% reported it was desirable, while only about 1% reported it was not important. Importantly, this quality standard was tied with another for having the highest percentage of parents rating it as essential. It was tied with ongoing assessment and evaluation of teachers, programs, and the facility, which is a closely related standard.

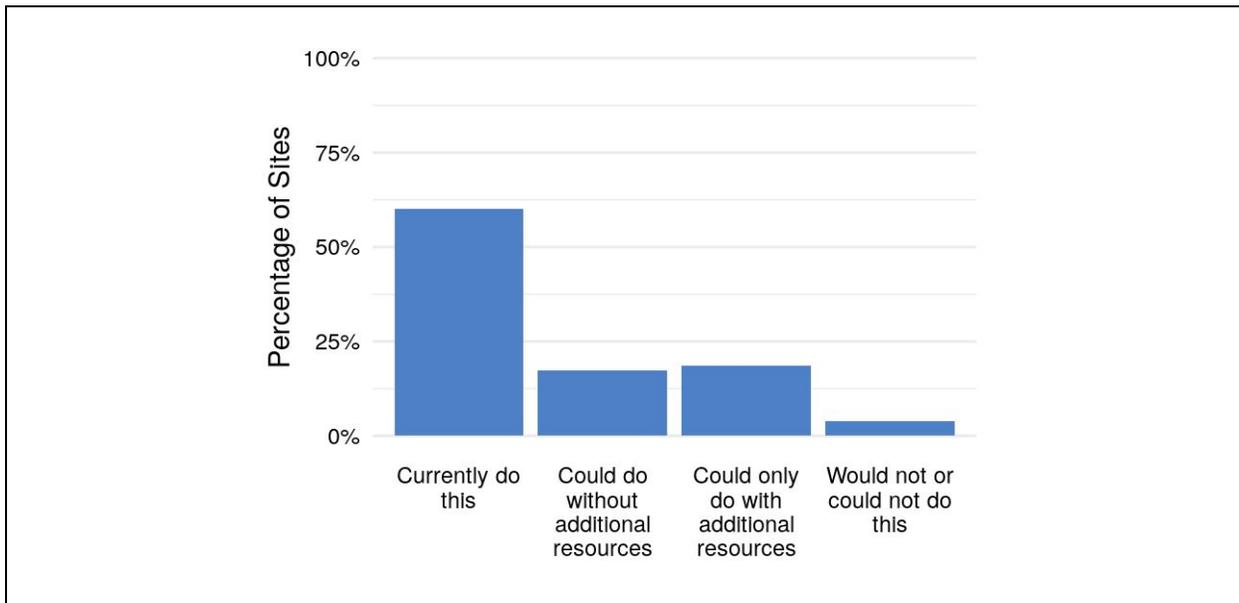
Providers' Willingness to Meet the Standard

Moving to providers, they were asked in the provider survey to state their willingness to have all teachers receive in-service training and professional development for a minimum of 15 hours per year. Their answers are presented below.

Providers willing and able to receive ongoing professional training and support for teachers

Percent of providers responding to the provider survey that described the extent to which they are willing and able to receive ongoing professional training and support for teachers as:

- “My program currently does this.
- My program does not currently do this, but my program would and could do this without additional resources or supports.
- My program does not currently do this, and my program would and could do this only with additional resources or supports.
- My program does not currently do this, and my program would not or could not do this.”



Forsyth Futures' Provider Survey

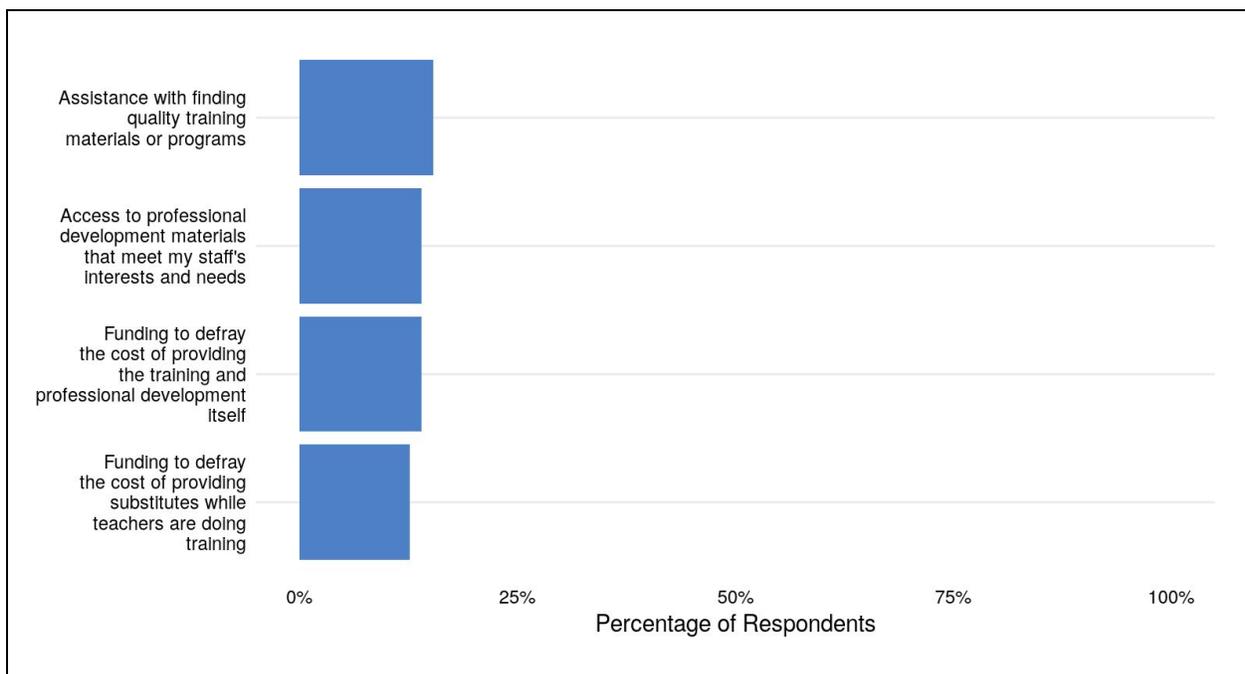
About 60% of providers reported that they already have teachers receive ongoing professional training and support. Of those providers that did not report already having teachers receive ongoing professional training and support, 17% could do it without additional resources, 19% could only do it with additional resources, and 4% would not or could not do ongoing professional training and support for teachers.

Supports Needed to Provide 15 Hours per Year of Professional Development

Providers who said they could meet the quality standard with additional resources were also asked what additional supports they would need. They listed the following supports, which show percentages for all providers.

Supports Needed to Have Teachers receive ongoing professional training and support

Percentage of Respondents Describing Supports Needed to Have teachers receive ongoing professional training and support by Kind of Support Needed



Forsyth Futures' Provider Survey

About 15% of providers reported that they would need assistance finding quality training materials or programs, 14% would need access to professional development materials that meet the staff's interests and needs, 14% would need funding to pay for costs of training, and 13% would need funding to pay for costs of providing substitutes.

Teacher Areas of Interest for Professional Development

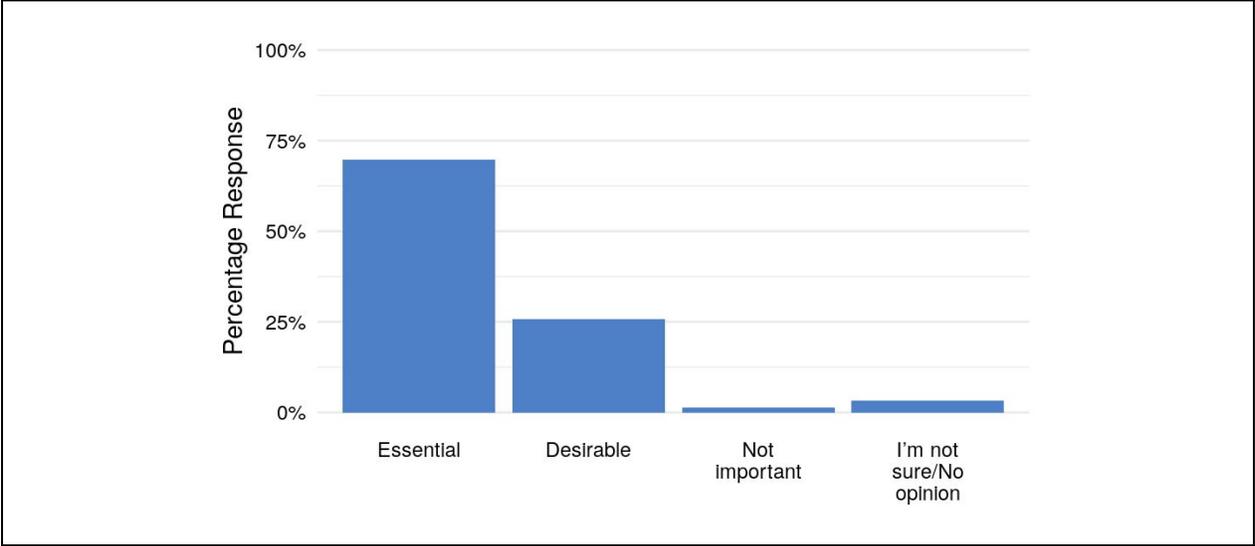
In the focus groups with teachers, teachers reported that the top areas that were needed for training was around discipline and difficult behaviors, communicating with parents, and social and child emotional development. Often communicating with parents was mentioned together with difficult behaviors.

Ongoing Assessments and Evaluations of Programs and Teachers

This section looks at ongoing assessments and evaluations of programs and teachers. It starts by looking at parents' preferences for the standard and then moves to providers' willingness to meet the standard.

Parents' Preferences for Ongoing Assessments

Parent Preference for ongoing assessments and evaluations of programs and teachers



Forsyth Futures' Parent/Caregiver Survey

About 70% of parents reported that ongoing assessment of programs and teachers at a Pre-K/preschool setting was essential and about 26% reported it was desirable, while only about 1% reported it was not important. At 70%, this standard was tied for having the highest percentage of parents as rating it as essential.

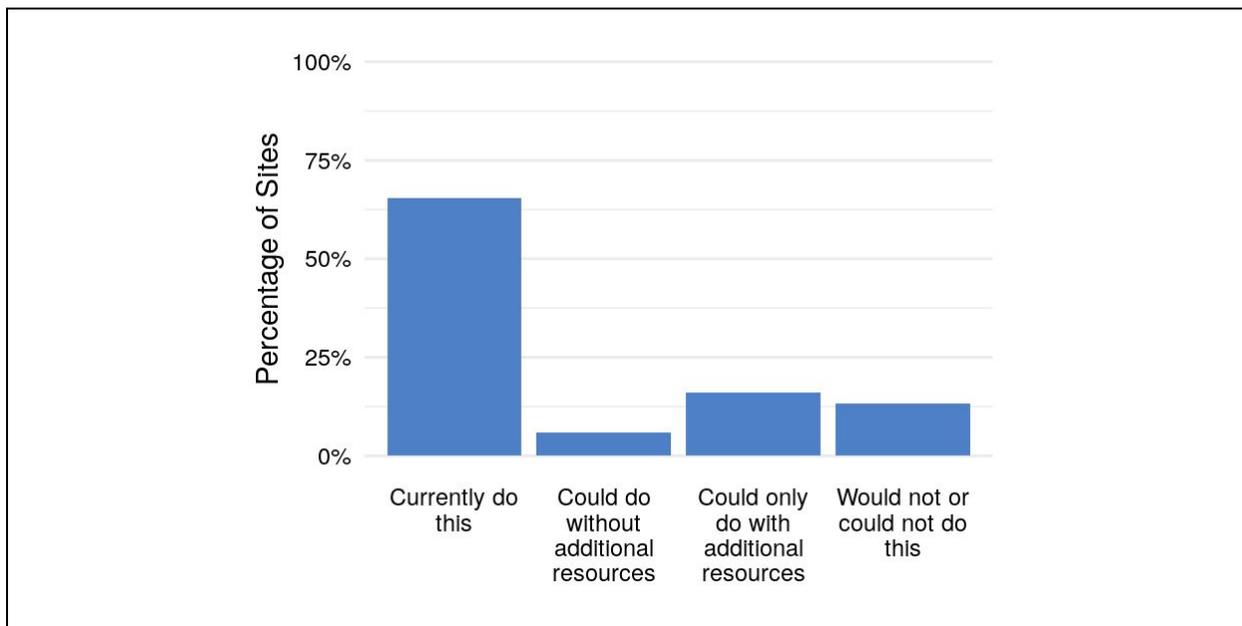
Providers' Willingness to Meet the Standard

Moving from parents to providers, the provider survey asked providers their willingness to meet this standard. The results are broken down below.

Percent of providers willing and able to have ongoing assessments and evaluations of programs and teachers

Percent of providers responding to the provider survey that described the extent to which they are willing and able to have ongoing assessments and evaluations of programs and teachers as:

- “My program currently does this.
- My program does not currently do this, but my program would and could do this without additional resources or supports.
- My program does not currently do this, and my program would and could do this only with additional resources or supports.
- My program does not currently do this, and my program would not or could not do this.”



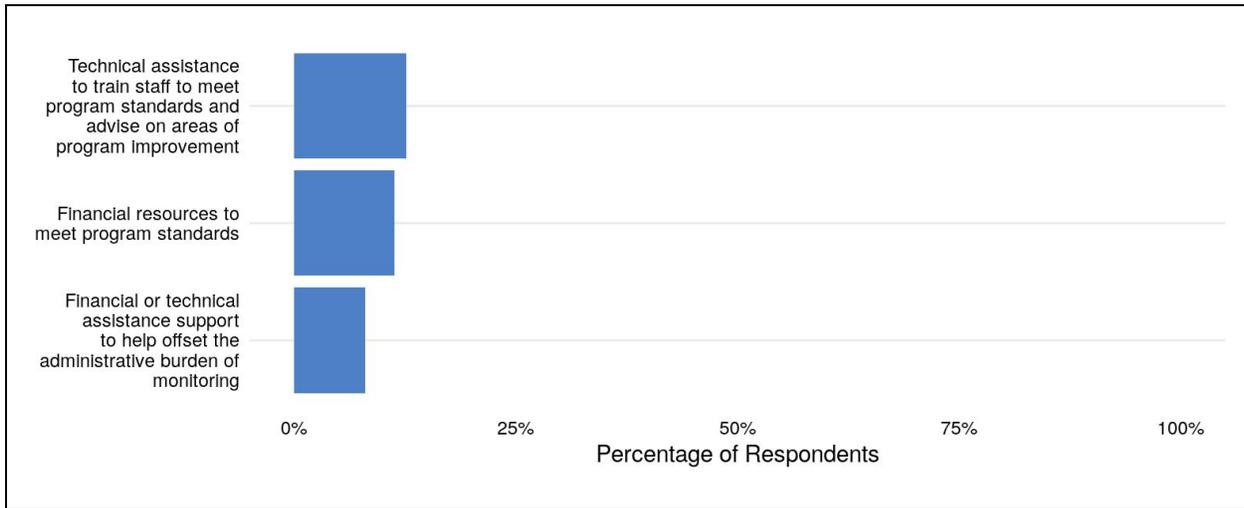
Forsyth Futures' Provider Survey

About 65% of providers reported that they already have ongoing assessments of programs and teachers. Of those providers that did not report already having ongoing assessments of programs and teachers, 6% could do it without additional resources, 16% could only do it with additional resources, and 13% would not or could not do ongoing professional training and support for teachers.

Supports Needed to Provide Ongoing Assessments

Forsyth Futures also asked providers about the supports they would need to meet this standard. The plot below highlights these answers.

Supports Needed to Have ongoing assessments and evaluations of programs and teachers



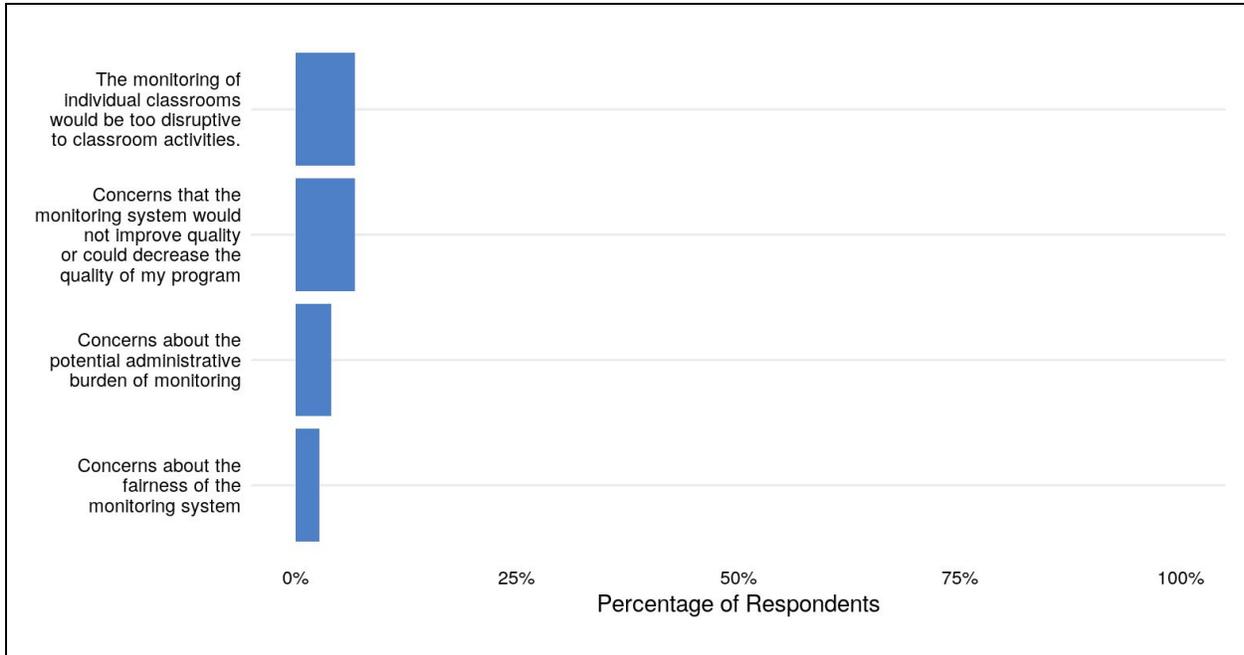
Forsyth Futures' Provider Survey

In order to provide ongoing assessments of programs and teachers about 13% of providers reported that they would need technical assistance to train staff to meet program standards and advise on areas of program improvement, 11% would need financial resources to meet program standards, 8% would need financial or technical assistance support to help offset the administrative burden of monitoring.

Factors Preventing Providers from Providing Ongoing Assessments

Finally, the provider survey asked providers not willing or able to have ongoing assessments of teachers to list the reasons why they would not. These responses are below.

Reasons Why Providers Would not be Willing/Able to Have Ongoing Assessments and Evaluations of Programs and Teachers



Forsyth Futures' Provider Survey

About 7% reported that monitoring of individual classrooms would be too disruptive to classroom activities, 7% reported concerns that the monitoring system would not improve quality or could decrease the quality of the program, 4% reported concerns about the potential administrative burden of monitoring, and 3% reported concerns about the fairness of the monitoring system.

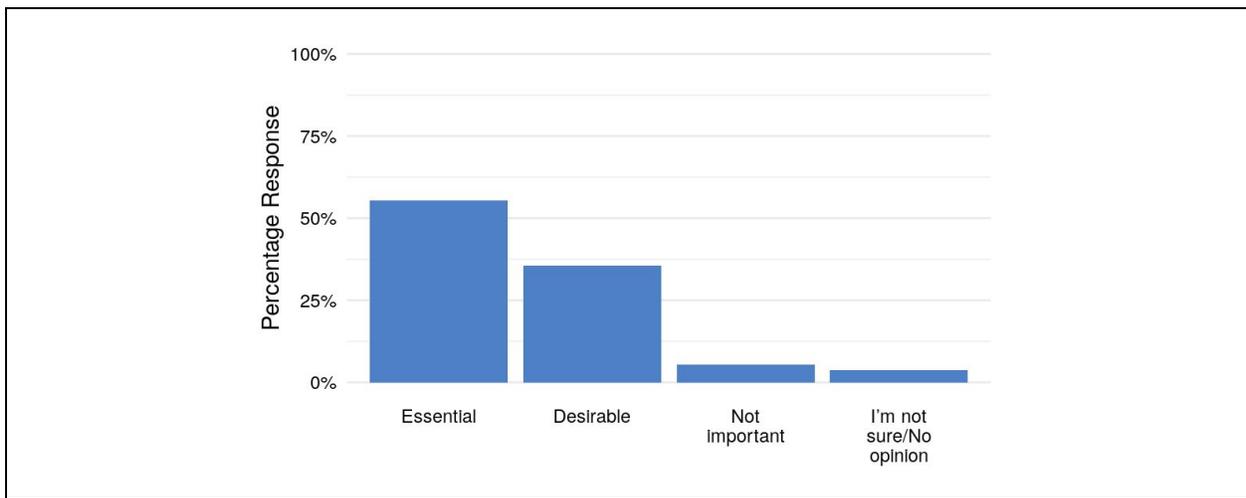
In provider interviews, providers were split as to whether or not continuous program evaluation would be an easy standard to meet. Some providers were uncomfortable with outsiders coming in to observe their classrooms.

Screenings for Children

This section looks at parents' and providers' perspectives on screenings, referrals, and support services. It starts by examining parents' preferences for screenings, referrals, and support services, and then evaluates providers' willingness to offer this service.

Parents' Preferences for Screenings

Parents' Preference for Assessments/Screenings and Referrals



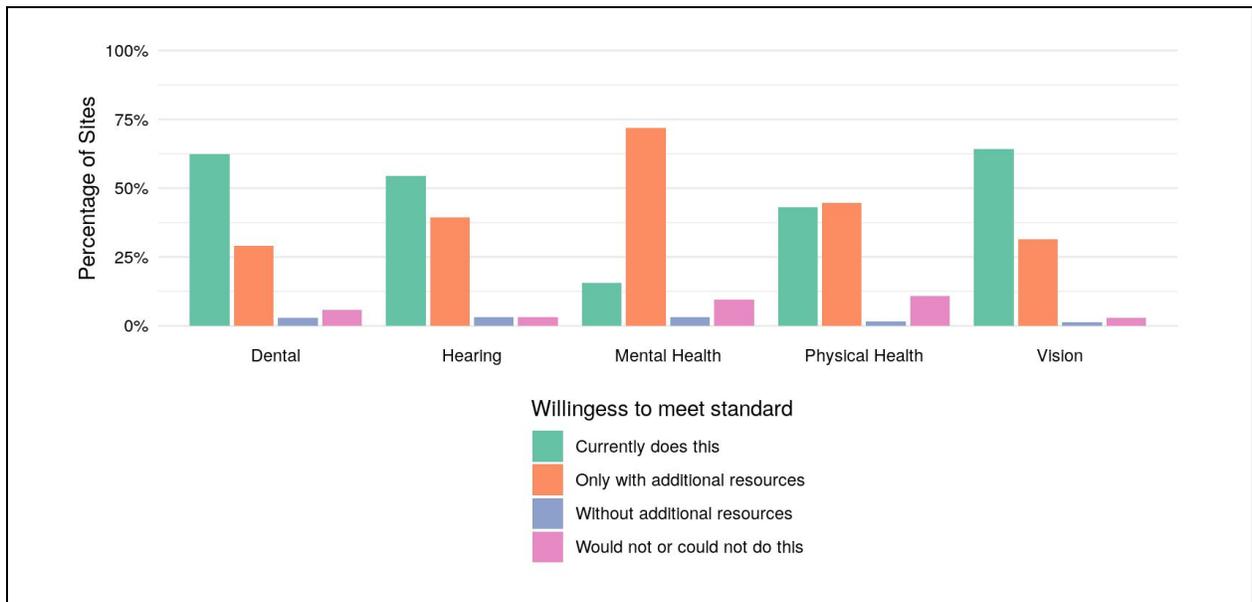
Forsyth Futures' Parent/Caregiver Survey

As shown above, the majority (55%) of parents view this feature as essential. Of the fifteen Pre-K priority standards, however, screenings and referrals for children only had the ninth highest percentage of parents listing it as essential.

Providers' Willingness to Meet the Standard

Providers were asked in the provider survey their willingness to meet this standard. The survey broke down the standard into subcomponents of vision, hearing, dental, physical health, and mental health.

Providers' Willingness to Meet Screening, Referral, and Support Services Standard



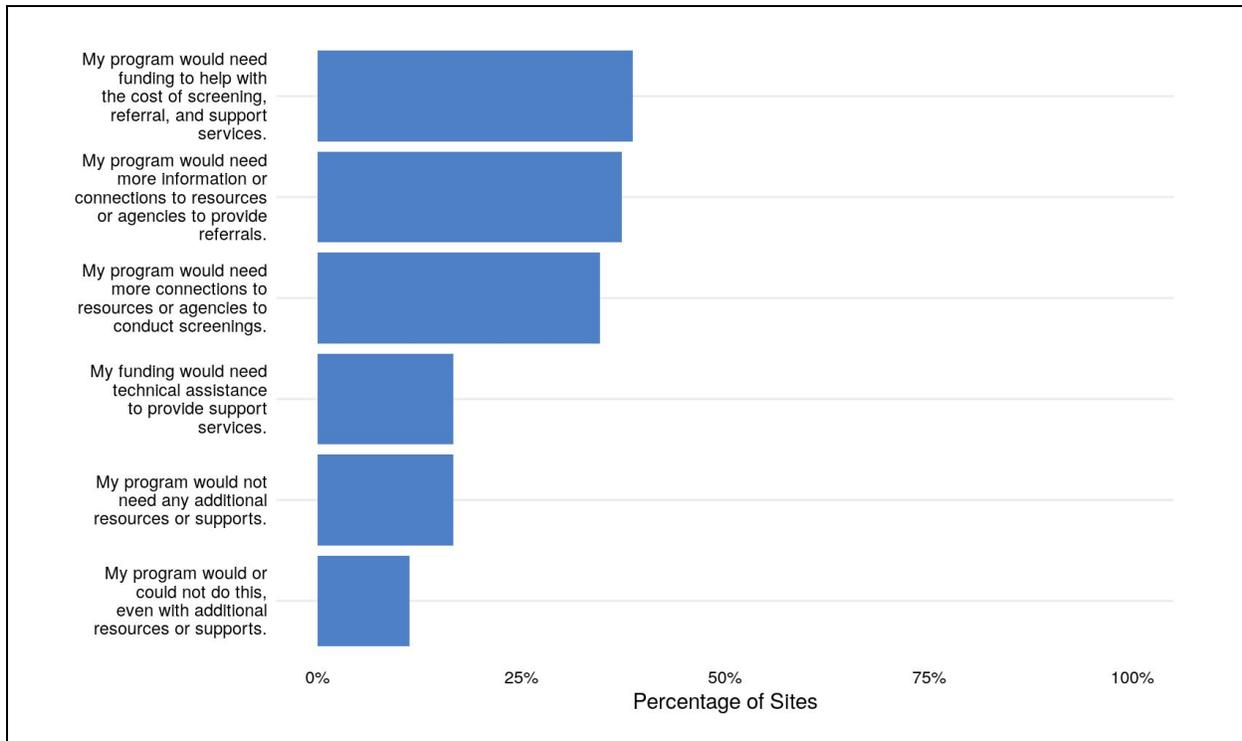
Forsyth Futures' Provider Survey

The main take-away from the results is that few sites currently provide screenings, referrals, and support services for children with mental health issues, and these sites would not be able to provide such services without additional resources.

Supports Needed to Provide Screenings, Referrals, and Support Services

Forsyth Futures asked providers the supports they would need to provide screenings, referrals, and support services.

Supports Needed to Meet Screening, Referral, and Support Services Standard



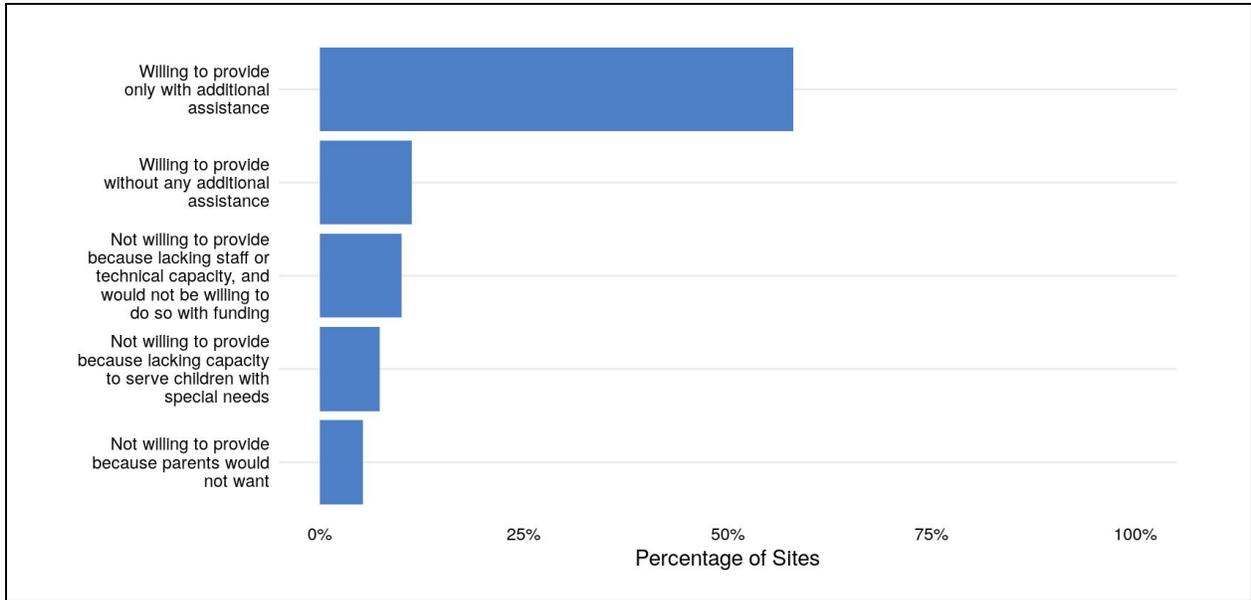
Forsyth Futures' Provider Survey

The results show a variety of needed supports. The most commonly listed support, however, was funding to help with the cost of offering the services (38%).

Factors Preventing Providers from Providing Screenings, Referrals, and Support Services

Programs that would or could not provide screenings, referrals, or support services were asked what factors contributed to their inability to provide such services. Although not all providers answered the question, the percentages represent the percentage of total sites in the survey.

Factors Contributing to Providers' Inability to Provide Service



Forsyth Futures' Provider Survey

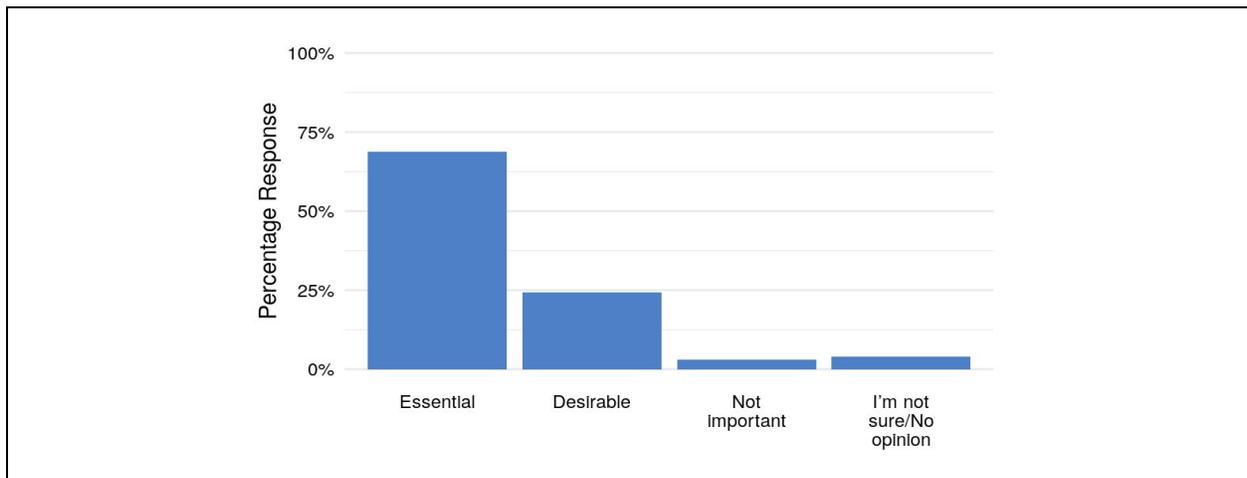
The most common reason given by providers for not being willing to provide screenings were that they were lacking staff or technical capacity and that they did not have the capacity to serve children with special needs.

4 or 5 Star Quality Ratings

This section looks at parents' and providers' perspectives on four or five star quality ratings. It starts by examining parents' preferences for four or five star quality ratings and then evaluates providers' willingness to offer this service.

Parents' Preferences for 4 or 5 Star Quality Ratings

Parents' Preference for 4 or 5 Star Quality Ratings

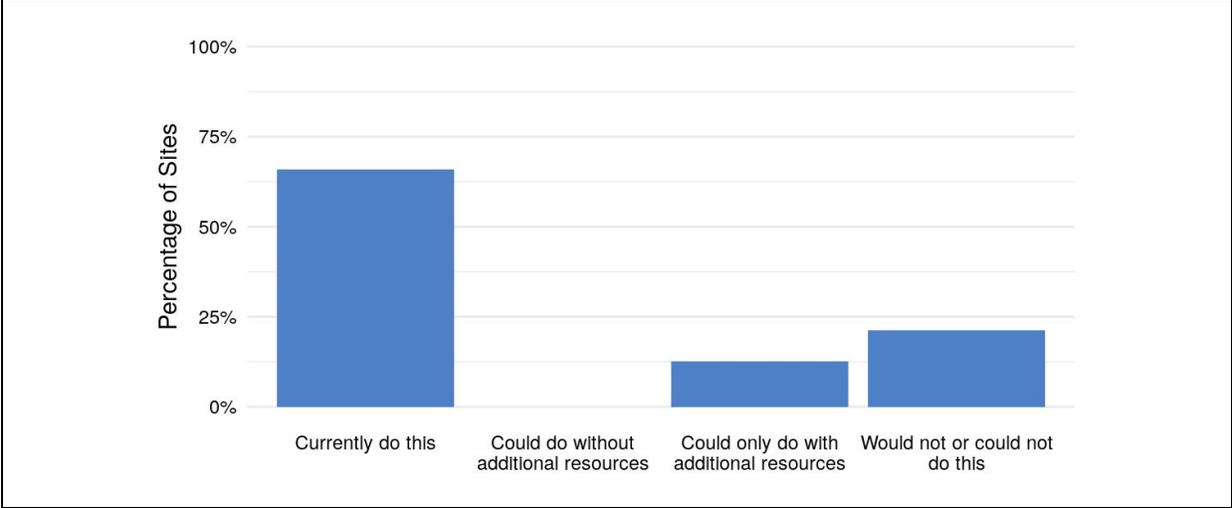


Forsyth Futures' Parent/Caregiver Survey

As shown above, the majority (68%) of parents view this feature as essential. Also of note, of the fifteen Pre-K priority standards, four or five star quality ratings had the third highest percentage of parents listing it as essential.

Providers' Willingness to Meet Standard

Providers' Willingness to Meet the 4 or 5 Star Quality Ratings Standard



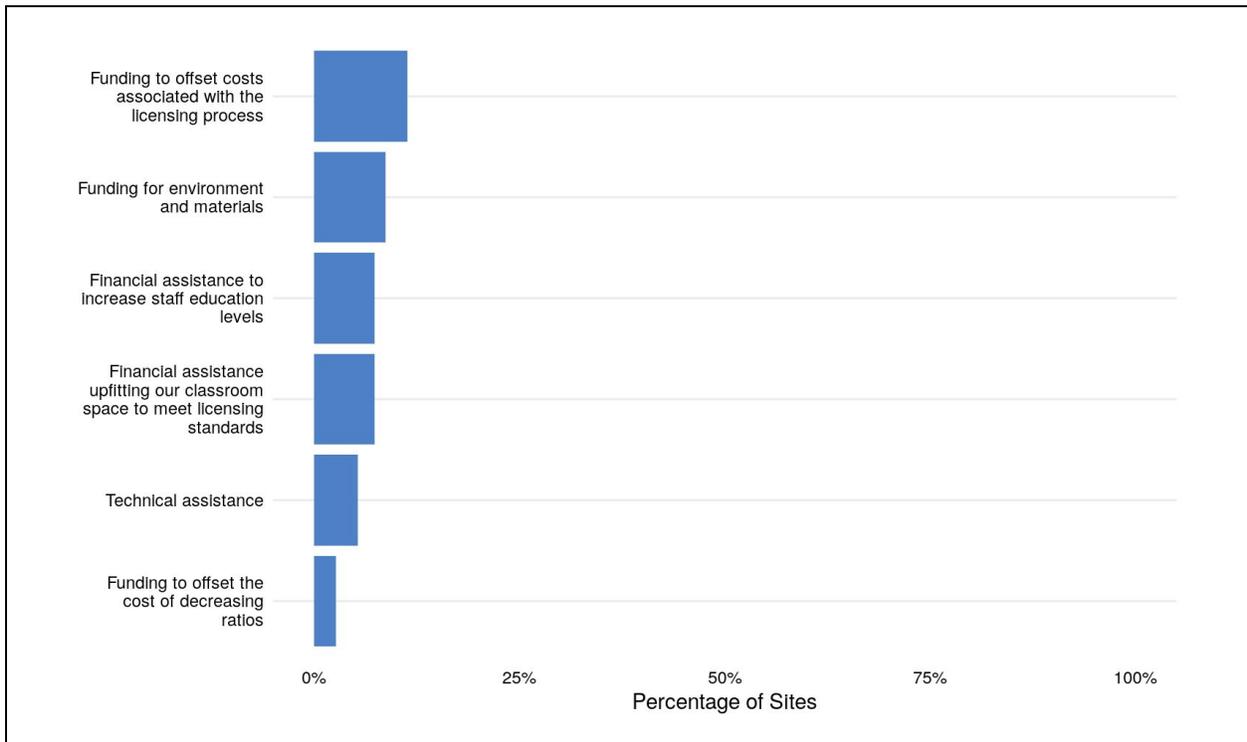
Forsyth Futures' Provider Survey

The majority of providers in the survey (66%) already meet this standard, but of note is that no providers said they could meet the standard without additional resources.

Supports Needed to Meet 4 or 5 Star Rating

Forsyth Futures asked providers the supports they would need to meet the 4- or 5-star rating standard. Only providers not currently meeting the standard answered this question, but the percentages reflect percentages for all sites in the survey.

Supports Needed to Meet 4- or 5-Star Rating Standard



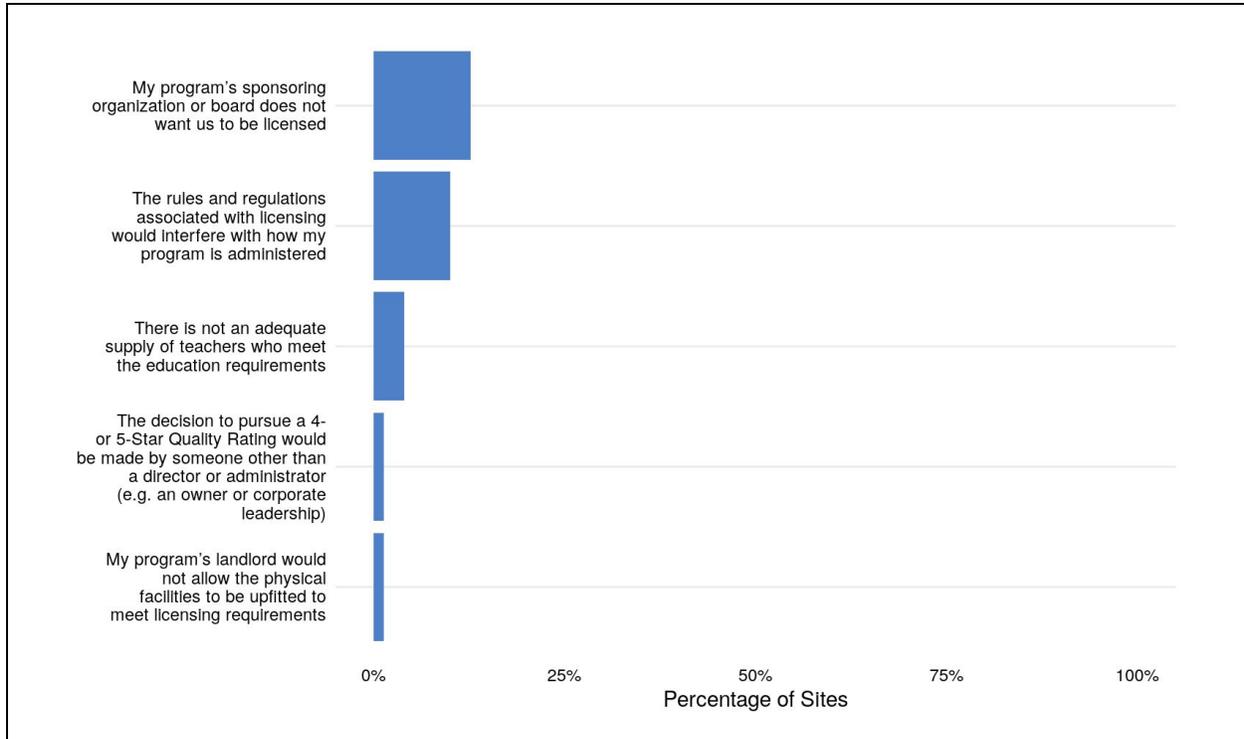
Forsyth Futures' Provider Survey

The most frequently mentioned support was funds to offset the cost of licensing at 11% of all providers.

Factors Preventing Providers from Meeting the 4- or 5-Star Rating Standard

Programs not willing to have a four or five star quality rating were asked what factors contributed to their inability to pursue a rating. Although not all providers answered the question, the percentages represent the percentage of total sites in the survey.

Factors Contributing to Providers' Inability to Pursue Rating



Forsyth Futures' Provider Survey

As shown above, the primary reason was that the program's sponsoring organization or board does not want the organization to be licensed.

Providers' Perspective of Meeting 4- or 5-Star Rating Standard from Qualitative

Providers expressed a mix of views towards the star rating system in interviews. Starting with the education requirements, many thought that education should not play as large of a role as it does. This sentiment stems from a corollary theme throughout the interviews that experience and innate ability to motivate and nurture children are often better indicators of teacher quality than education.

Some providers also felt that a three hour assessment occurring once every couple of years is not enough time to gauge the quality of a program. To these providers, there is no way to assess a typical day in three hours. Additionally, some providers noted that staff can get nervous when assessed, so the assessment is not a true picture of their performance in the classroom.

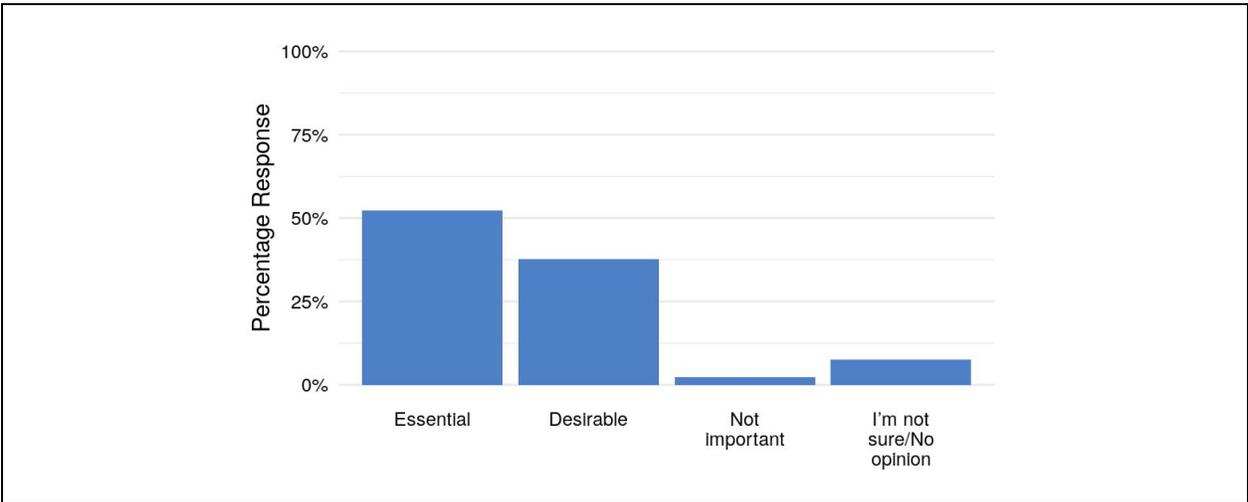
Finally, many providers felt that the star ratings focused too much on regulations that hinged on specific words and timing. Often, this hyper-focus on specific regulations made it difficult to tailor instruction to the needs of particular children. A common criticism along the same lines was that the regulations were impractical or overly specific, especially for infants and toddlers.

Staff to Child Ratio of 1:10 or Less

This section looks at parents' and providers' perspectives on the staff to child ratio of 1:10 and maximum class size of 20 students standard. It starts by examining parents' preferences for the standard and then evaluates providers' willingness to conform with this standard.

Parents' Preferences for 1:10 Ratio

Parents' Preference for 1:10 Ratio

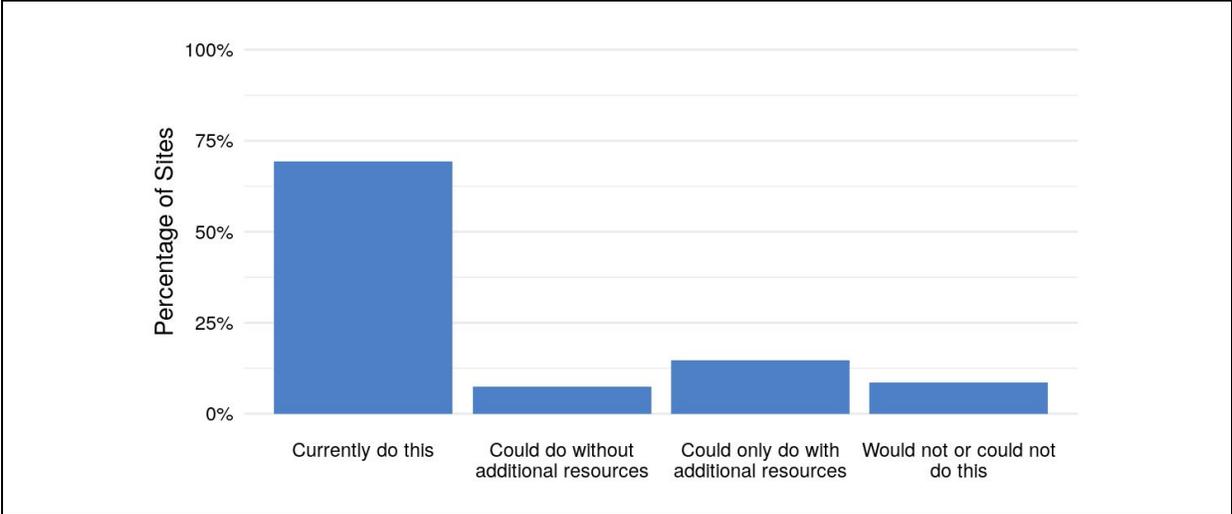


Forsyth Futures' Parent/Caregiver Survey

As shown above, a majority (52%) of parents viewed this feature as essential. However, of the fifteen Pre-K priority standards, the 1:10 ratio had the fifth lowest percentage of parents labeling it as essential.

Providers' Willingness to Meet the Standard

Providers' Willingness to Have Max Class Size of 20 and Staff to Child Ratio of 1:10 or Less



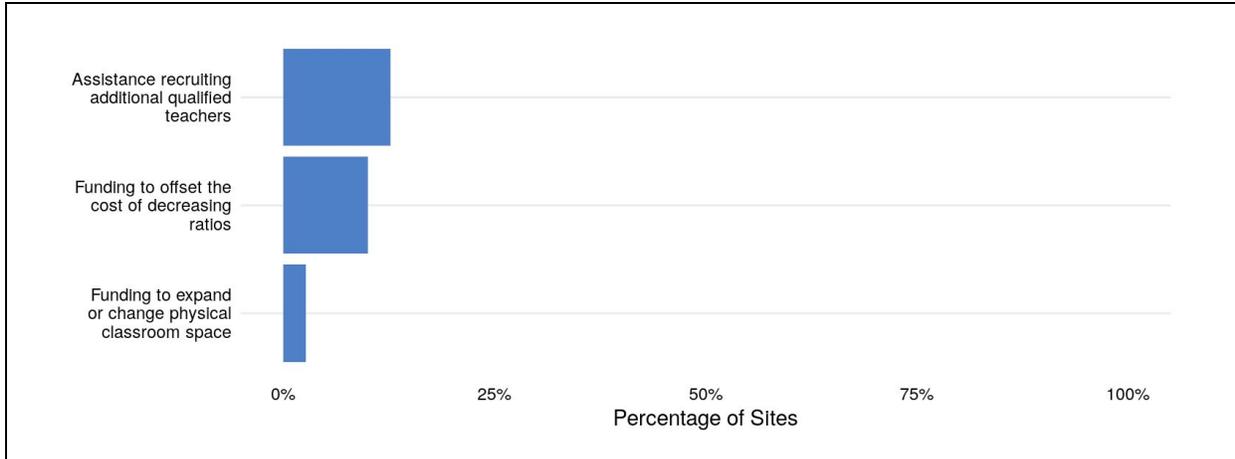
Forsyth Futures' Provider Survey

The majority of providers in the survey (70%) already meet this standard, and those that do not are equally mixed on their willingness to meet the standard.

Supports Needed to Meet Standard

Forsyth Futures asked providers the supports they would need to meet the maximum class size of 20 and staff to child ratios of 1:10 or less standard. Only providers not currently meeting the standard answered this question, but the percentages reflect percentages for all sites in the survey.

Supports Needed to Meet Max Class Size of 20 and Staff to Child Ratio of 1:10 or Less Standard



Forsyth Futures' Provider Survey

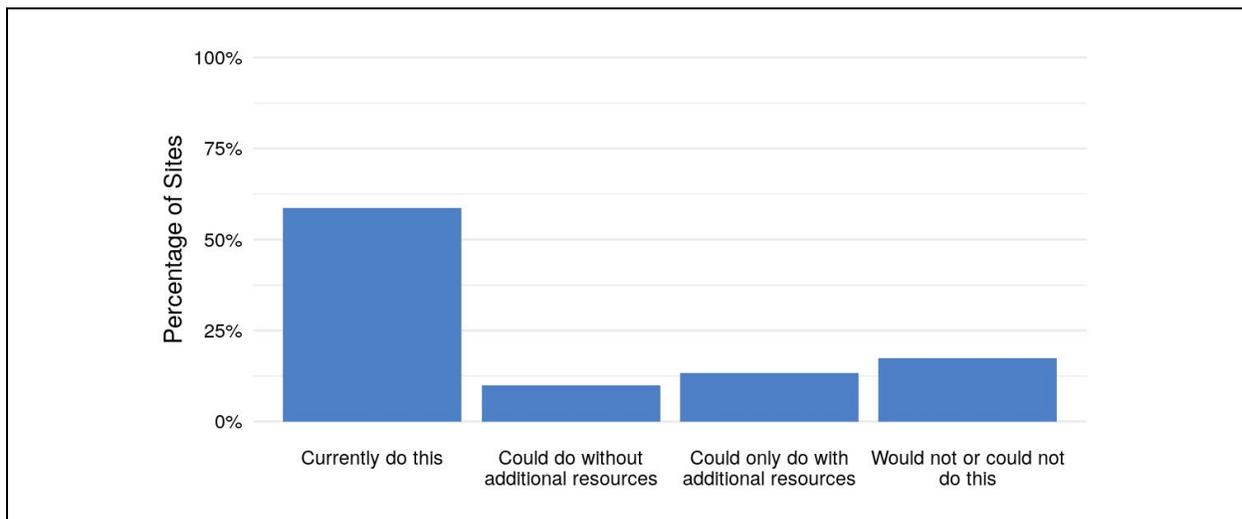
For those answering the question, assistance recruiting additional teachers (13%) and funding to offset the cost of decreased ratios (10%) were the most common answers. Funding to offset costs coincides with findings from provider interviews, where some providers said that programs could be reluctant to reduce their ratios due to the loss of income.

6.5 Hours of Instruction

This section looks at providers' perspectives on the 6.5 hours of instruction standard by examining their willingness to conform with this standard.

Providers' Willingness to Meet the Standard

Providers' Willingness to Have 6.5 Hours of Instruction



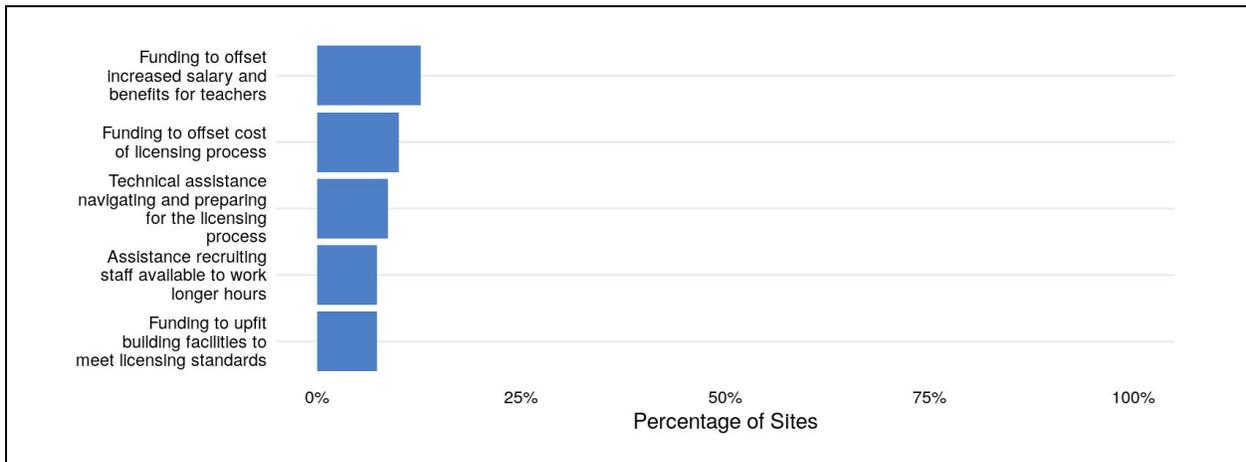
Forsyth Futures' Provider Survey

A slight majority of providers in the survey (59%) already meet this standard, and those that do not are equally mixed on their willingness to meet the standard.

Supports Needed to Meet Standard

Forsyth Futures asked providers the supports they would need to meet the 6.5 hours of instruction standard. Only providers not currently meeting the standard answered this question, but the percentages reflect percentages for all sites in the survey.

Supports Needed to Meet 6.5 Hours of Instruction Standard



Forsyth Futures' Provider Survey

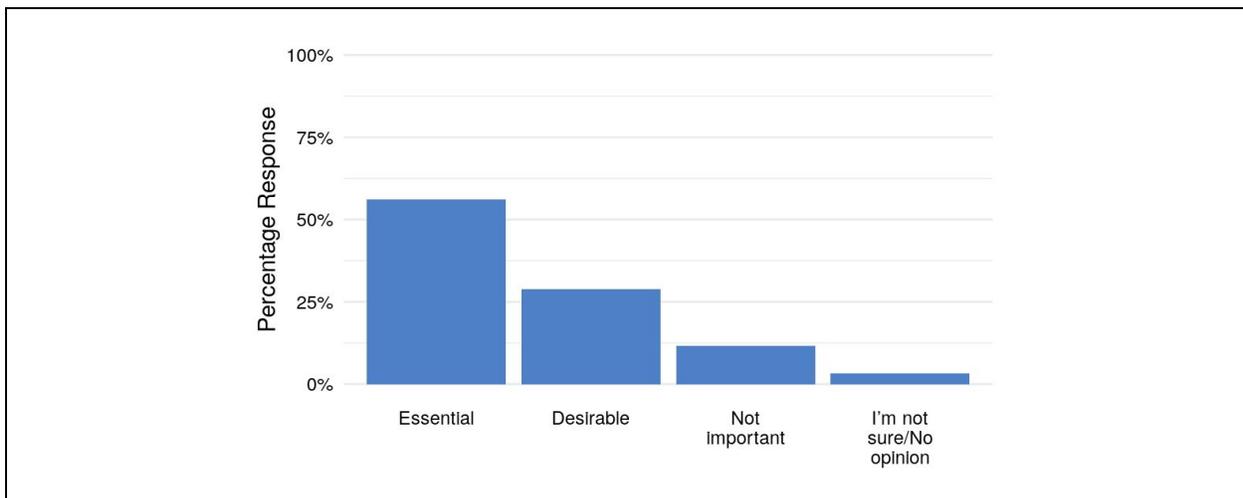
The two most common answers centered on funding, with funding to offset increased salaries as the most common response (13%) and funding to offset the costs of licensing as the second most common (10%).

One Nutritious Meal a Day

This section looks at parents' and providers' perspectives on one nutritious meal a day. It starts by examining parents' preferences for one nutritious meal a day and then evaluates providers' willingness to offer this service.

Parents' Preferences for One Nutritious Meal a Day

Parents' Preference for One Nutritious Meal a Day

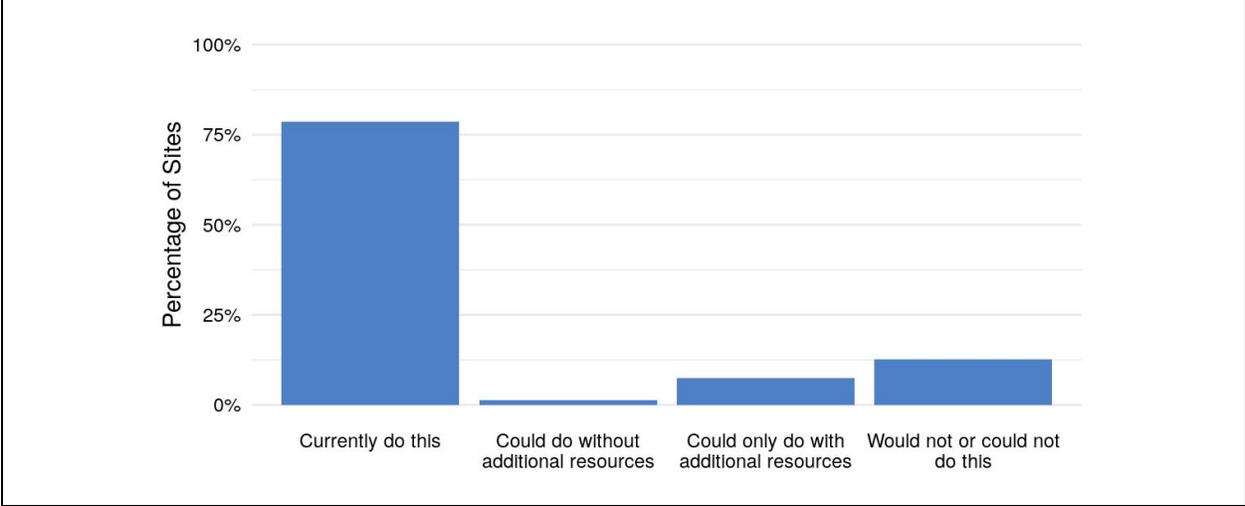


Forsyth Futures' Parent/Caregiver Survey

As shown above, the majority (56%) of parents view this feature as essential. Of the fifteen Pre-K priority standards, one nutritious meal had the eighth highest percentage of parents rating it as essential.

Providers' Willingness to Meet the Standard

Providers' Willingness to Meet One Nutritious Meal a Day Standard



Forsyth Futures' Provider Survey

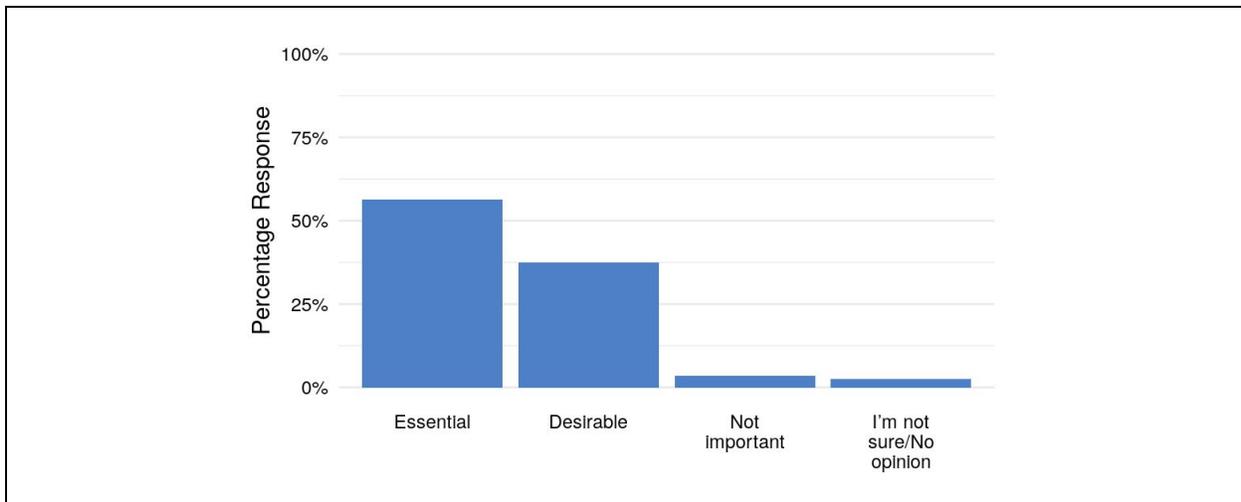
Providers were asked in the provider survey their willingness to meet this standard and the vast majority (79%) already meet it.

Parent and Family Engagement

This section looks at parents' and providers' perspectives on parent and family engagement. It starts by examining parents' preferences for parent and family engagement and then evaluates providers' willingness to offer this service.

Parents' Preferences for Parent and Family Engagement

Parents' Preference for Parent and Family Engagement



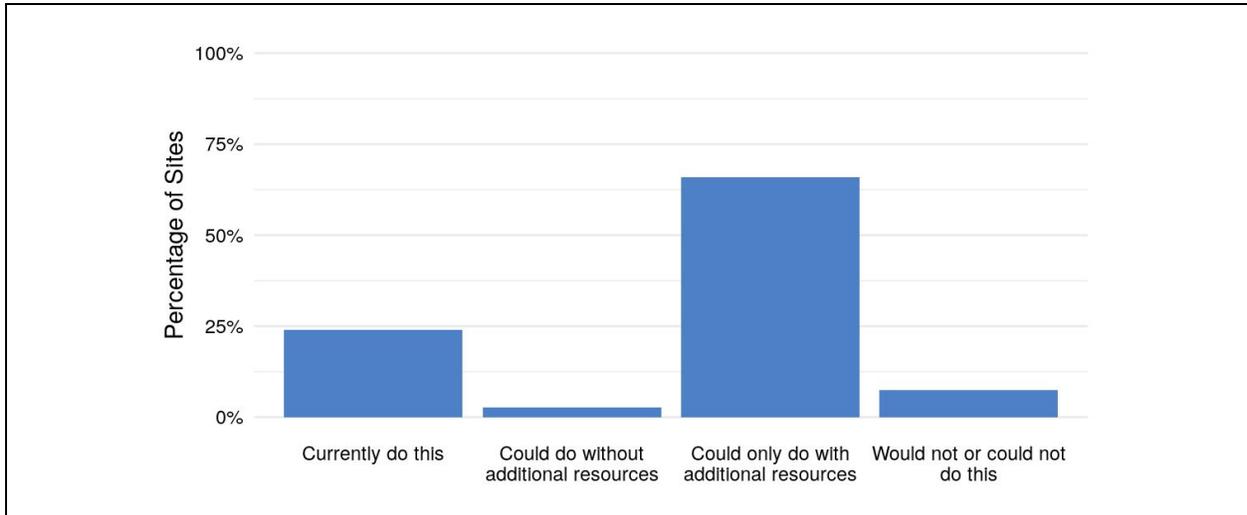
Forsyth Futures' Parent/Caregiver Survey

As shown above, a slight majority (56%) of parents view this feature as essential. Additionally, of the fifteen Pre-K priority standards, parent and family engagement had the seventh highest percentage of parents rating it as essential.

Providers' Willingness to Meet Standard

Providers were asked in the provider survey their willingness to meet the parent and family engagement standard through the following question: "To what extent would you be willing or able to have a dedicated staff person whose job it is to work with families to enable them to carry the learning in the center on into the home while at the same time being available to assist families in accomplishing any goals they might have either personally or as a family?"

Providers' Willingness to Meet the Parent and Family Engagement Standard



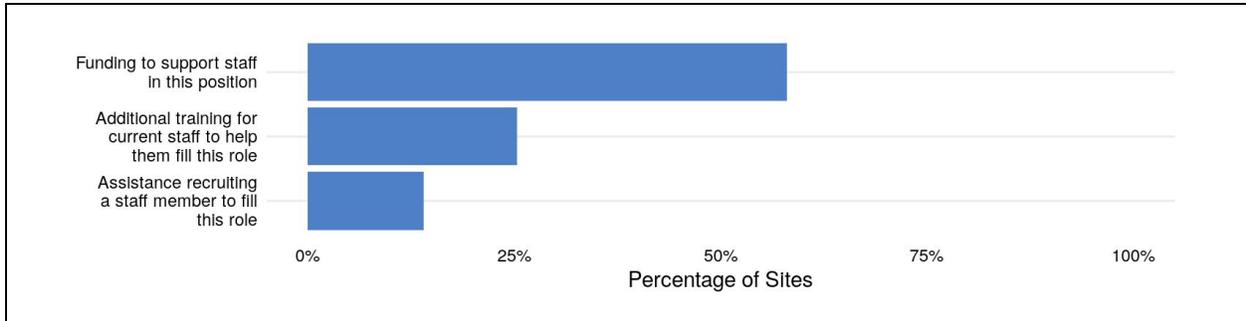
Forsyth Futures' Provider Survey

Only 24% of providers currently meet this standard and 66% said that they could only meet it with additional resources.

Supports Needed to Meet Parent and Family Engagement Standard

Forsyth Futures asked providers the supports they would need to meet the parent and family engagement standard. Only providers not currently meeting the standard answered this question, but the percentages reflect percentages for all sites in the survey.

Supports Needed to Meet Parent and Family Engagement Standard



Forsyth Futures' Provider Survey

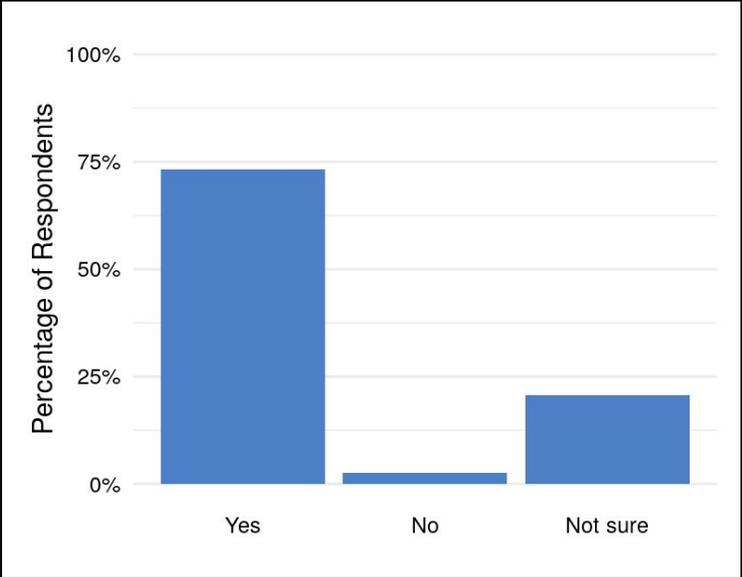
The most frequently mentioned support was funding to support additional staff, with 58% of all providers listing this response.

Provider's Willingness to Accept Pre-K Priority Funding

As a part of the Feasibility Study, Forsyth Futures researchers assessed providers' potential willingness to accept additional third-party funds to pay for additional Pre-K slots. The following section describes the number of providers researchers estimate are willing to potentially accept funding from Pre-K Priority to fund additional Pre-K slots and the factors that influence how willing providers would be to accept this funding.

Number of Providers Potentially Willing to Accept Pre-K Priority Funding

Respondents' Willingness to Accept Local Funding



Forsyth Futures' Provider Survey

About 73% of providers participating in the provider survey reported that they would be willing to participate in a local funding program to support the cost of caring for 4-year-old students if Forsyth County had one. Another 21% of providers said that they were not sure if they would participate or not, and 3% of providers said that they would not participate.

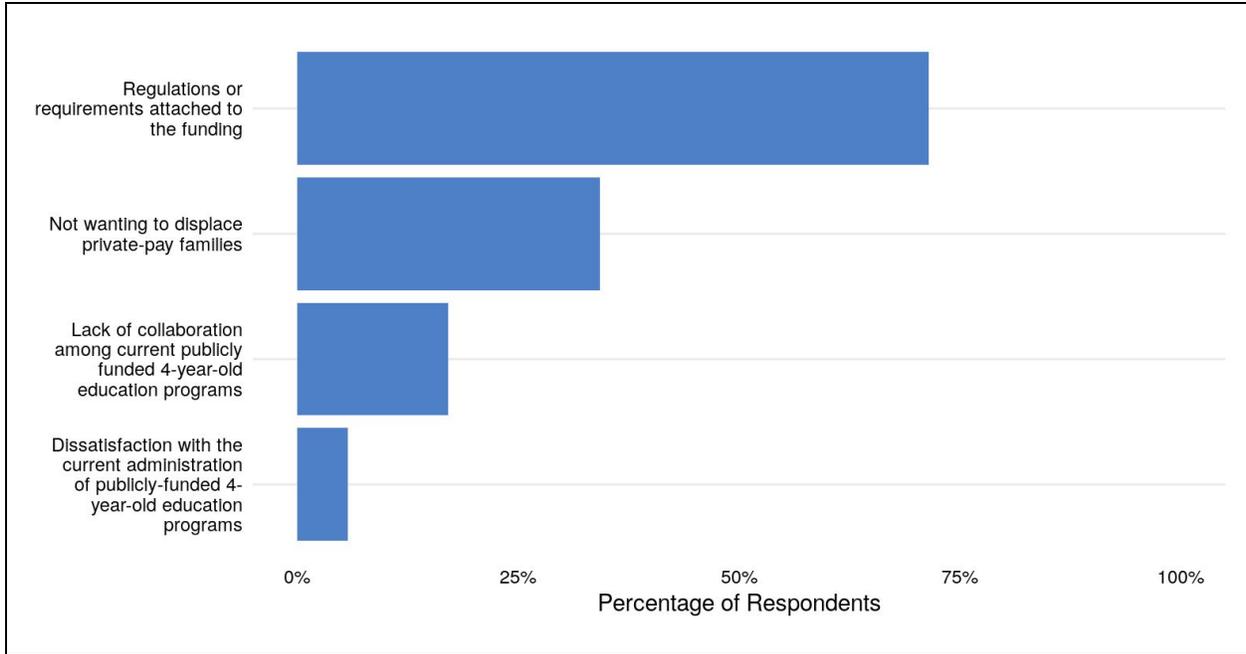
Factors Influencing Providers' Willingness to Accept Pre-K Priority Funding

In qualitative interviews with program administrators, many respondents felt that providers in general would be willing to expand their Pre-K programs or accept additional third-party slots funded by a third party, but respondents also noted some barriers and mitigating factors that would influence that decision. These factors included the following:

- **Funding Stream Considerations**
 - Some respondents noted that the expectations and support associated with third-party funding would influence their willingness to accept it.
 - Other respondents commented that regulations around how some funds could be used or which families they could be used for made some publicly-funded programs difficult to administer.
- **Current Management of Public Programs**
 - Some respondents described frustrations with current publicly-funded programs as a factor that would discourage their participation in an expanded Pre-K system.
 - Their concerns with the current programs were most often frustration with how classrooms are distributed and competition/a lack of collaboration among current programs.
 - A few respondents described their own negative experiences or experiences of other providers, who were sometimes in other communities, with classrooms or compensation for slots not coming through as providers had expected and cited this as a reason that their program would not participate in an expanded Pre-k system.
- **Compensation/Costs**
 - Funding and financial incentives were generally described as a strong incentive to expand Pre-K programs to accept more children.
 - Many respondents noted that the funding would need to be sufficient to cover all of the costs of the classrooms, especially the costs associated with the standards proposed by the Pre-K Priority.
 - Funding to cover the cost of hiring teachers with higher levels of education was commonly described as a need.
 - Many respondents described a need for funding to cover the cost of materials for pre-K classrooms. One respondent commented that they thought some programs may have materials on hand in storage that they could move around to furnish new classrooms.
- **Parents' Ability to Pay**
 - Some respondents commented that providers may be less willing to take publicly funded slots if they have enough privately paying families to fill their classrooms or if the space used by third-party-funded programs means that they would not have enough space to meet the potential demand for private-paying slots.
- **Partnerships**

- Some respondents commented that benefits from existing or past partnerships with other organizations would encourage them to accept Pre-K slots funded by a third party.

Factors Influencing Providers' Willingness to Accept Funding



Forsyth Futures' Provider Survey

The most common factors that providers identified as discouraging them from participating in a funding program were regulations or requirements attached to the funding and not wanting to displace private-pay families, given by 71% and 34% of providers saying that they would not accept public funding or were not sure if they would accept public funding respectively. About 17% of these providers cited lack of collaboration among current publicly-funded 4-year-old education programs as a factor that would discourage them from participating.

Conclusions: Pre-K Priority Goals

Current Pre-K providers are generally willing to participate in a local funding program for Pre-K. The main considerations that would prevent them from doing so are the regulations attached to the funding and not wanting to displace private pay families. Most providers would be willing to expand, though a little more than half would need resources to do so. The most common resources needed were assistance recruiting staff, additional funding, assistance with materials, assistance with building new space, and assistance upfitting current space to meet licensing requirements. Though, some administrators noted in interviews that expansion would place more of a burden on administrators that may need to be relieved through additional staff or professional development. Lack of physical space to expand was the most common barrier to capacity expansion.

No sites are currently meeting all of the Pre-K Priority's quality standards, and no sites reported being willing to meet all of the standards without additional resources or supports. About 57% of providers were willing and able to meet all of the standards if additional supports were provided. Screenings, especially for mental health, are going to take more resources to provide. Funding, information, and connection to programs that screen are the main resources needed to administer screenings. A notable minority of providers are not willing to provide mental and physical health screenings. Most providers reported needing support for the family support person, but most providers are willing to do it with support. Funding to support staff for that position is the most commonly reported support needed to meet that standard.

Impacts of Implementation

Key Findings: Impacts of Implementation

- Administrators generally reported that they anticipated that Pre-K expansion would improve kindergarten readiness and educational equity, encouraging diverse classroom settings.
- Administrators expressed concerns that Pre-K expansion would negatively affect private childcare providers and that it may limit the number of teachers and childcare slots available for children ages 0-3.
- Peer communities that have implemented expanded Pre-K programs recommended considering a consistent or universal application process and considering the administration of the program, including an application process as a part of the program design, and the encouraged assessing how an expanded Pre-K program might intersect with existing programs and services.
- They also recommended assessing the nature and scope of information technology support needed for the initiative and considering how the data for the program will be managed.

- In program implementation, they recommended developing good timelines, setting priorities, and incorporating local community leadership.

Perceptions of Potential Impact of System Implementation

In provider interviews, providers reported the following anticipated impacts of Pre-K expansion on the community, which are described in more detail in the following paragraphs:

- educational equity,
- private child care providers,
- Kindergarten readiness, and
- teacher supply.

Related to educational equity, respondents indicated that they anticipated that Pre-K expansion would improve educational equity by making sure that all children have equal access to high-quality early education programs. Additionally, providers reported that diverse classroom settings were generally seen as beneficial to students. Some respondents indicated that they thought the expansion would result in early childhood education settings being less segregated by socioeconomic status and race, however there were concerns that it could also increase segregation depending how the system was set up, reflecting the impact of school choice on the current K-12 system.

Another theme was related to how Pre-K priority would affect private child care providers. There were mixed feelings about the impact with some providers expressing concern that private child care would not be allocated as many slots, while others felt that it had the potential to benefit private centers, depending on how the slots were allocated. Some respondents pointed to childcare centers closing in other communities as a result of pre-K expansion. Other things that were mentioned were it could exacerbate competition for school system staffing, and Pre-K priority sites taking away from other child care programs.

On the theme of Kindergarten readiness many respondents commented that they felt that Pre-K expansion would improve kindergarten readiness. Often this was associated with children being better prepared to interact in a classroom setting or coming in with the academic knowledge and skills they would need to be successful. Many respondents also noted that kindergarten readiness standards have changed and that children are now expected to come in with more skills. This was sometimes coupled with concerns about a shift from play-based to instruction-based learning.

The last major theme was on teacher supply. Many participants felt like Pre-K expansion would increase the demand for teachers, especially those with a BK degree, which would result in a shortage of teachers with BK degrees, particularly in Pre-K classrooms outside the school system. Other

respondents felt that there would not be a shortage for their program because they could easily hire teachers working in the private sector (school-based program) or that the expansion program and/or an associated increase in pay would encourage more people to enter the field or current teachers to increase their level of education. Some respondents commented that higher pay, better benefits, and/or financial incentives would be required to recruit and retain high-quality teachers.

Impacts on the Infant/Toddler Child Care System

Most respondents who commented on the impact on the number of teachers available felt that Pre-K expansion would decrease the number of teachers who were available for teaching 0-3, especially if benefits and pay were better for 4-year-old teachers.

Some respondents anticipated that Pre-K expansion would create a shortage of slots for children between the ages of 0-3 as a result of infant and toddler classrooms being converted into Pre-K rooms to allow for the expansion or as the end result of 4-year-olds, who often financially subsidize other age groups in childcare centers, being diverted to other sites, such as the school system, resulting in center closures or difficulty maintaining staff ratios.

Experience of Peer Communities

Interview with peer communities that have expanded Pre-K classrooms provided several considerations for the process.

Feasibility and value of a universal application process. If multiple programs are operating within a community, consider whether a universal application process is a benefit. Alternately, it may be helpful to consider or work towards consistency across applications, to help parents and staff avoid confusion. The application process, however, is just one aspect of program administration, which needs to be considered during overall program design. It may be helpful, if not necessary, for example, to work early and closely with financial staff to ensure rigorous and compliant processes.

Online services or supports. Generally speaking, communities will need to consider the nature and scope of information technology support for the initiative, including the need or desire to make application materials downloadable or available for electronic submission. Further, communities may need to consider the languages present, and make arrangements for translated documents or translation support.

Intersections with other programs or services. Communities may consider what, if any, other family supports will be made available, such as one-on-one consultations or telephone-based services for families (and, in what languages these may be needed). Further, communities may consider whether or not the program design will include accommodations for families with multiple children, to ensure siblings can be served at the same location, or the other types of family-responsive services or accommodations that may be necessary. If communities focus on highly-vulnerable children, additional services may be merited, such as trauma-informed or -responsive care for children and families or supports for parents and educators who are responding to behavior challenges. The initiative may benefit from collaboration with partner agencies in the community—including agencies that provide technical assistance or training to ensure the quality of programming or other forms of implementation support. Collaborations also may help ensure consistent messages and outreach to the community and parents and may help mitigate challenges across agencies with regard to quality expectations or staff compensation. Other important collaborators, especially for blending funds, include the state-supported subsidy system, Title 1, Head Start, or programs such as the federally-supported food program.

Data and information management. Communities will need to consider the management of personal and program information, noting the need for secure protection of personally identifiable information. The design and development of databases can be costly and can be factored into the initiatives overall timeline.

Hidden or secondary costs. Communities may need to expect hidden or secondary costs that don't become apparent until after the initiative begins implementation. Examples that were cited included professional development and supports for educators, marketing and outreach, changes in the

availability of funds for braiding or blending funding, and supports for community partners who are collaborators but still may need financial support.

Time factor. Communities should develop good timelines that allow for the development of program infrastructure as well as services.

Setting priorities. Communities may need to identify target populations for services, even for a universal program. This may especially be the case if the initiative rolls out over time, with placements added over a period of years. With priorities established, communities may need to develop or ensure there are community partners that can help recruit the target population.

Value of leadership. As discussed in this report, the initiative may benefit from committed and effective leadership. However, there may be periodic turnover in leadership, including elected representatives, agency leaderships, or members of the business community. Thus, communities may need to consider how best to develop and sustain strong leadership over time.

Conclusions: Impacts of Implementation

Administrators generally reported that they anticipated that Pre-K expansion would improve kindergarten readiness and educational equity, encouraging diverse classroom settings. Administrators expressed concerns that Pre-K expansion would negatively affect private childcare providers and that it may limit the number of teachers and childcare slots available for children ages 0-3.

Peer communities that have implemented expanded Pre-K programs recommended considering a consistent or universal application process and considering the administration of the program as a part of the program design, and the encouraged assessing how an expanded Pre-K program might intersect with existing programs and services. They also recommended assessing the nature and scope of information technology support needed for the initiative and considering how the data for the program will be managed. In program implementation, they recommended developing good timelines, setting priorities, and incorporating local community leadership.

Survey Participants

Analysis of Provider Survey Responses

In total, 89 facilities were included in the survey responses. In some instances respondents completed the survey for multiple facilities and the numbers included in the table below are the total number of facilities represented by the survey responses.

Number of Facilities by Type from Survey Responses

	Number of Facilities Represented in Responses	Total Number in Forsyth County	Percentage
Schools	35	35	100%
HeadStart	4	4	100%
Private Centers	37	79	47%
Half Day	11	39	28%

Forsyth Futures' Provider Survey

Analysis of Parent Survey Respondents

Upon receiving the parent survey data, Forsyth Futures researcher attempted to isolate responses to Forsyth County households by filtering ZIP codes to only include those that are wholly or partially in Forsyth County. Attempts to remove duplicate entries per person or household were also made by filtering out repeat IP addresses. Of the duplicate IP addresses, the one with the largest number of completed survey questions was kept. Duplicate physical addresses were also identified and removed in a similar fashion.

733 survey responses remained after these data cleaning steps. The rest of this section breaks down the responses by demographic. But, the sum total of each demographic may be less than 733 because not all respondents filled out the demographic information.

Respondents by Race/Ethnicity

The table below shows the number and percentage responses by race / ethnicity. Parents were asked to state the race / ethnicity of their household and they were allowed to select more than one option. The 'Multiple Race / Ethnicities Selected' category in the table represents respondents who selected more than one race / ethnicity.

Household Race/Ethnicity of Survey Respondents

Race/Ethnicity	Number of Respondents	Percentage
White, non-Hispanic	369	48%
African American	196	25%
Multiple Race / Ethnicities Selected	93	12%
Hispanic / Latino	87	11%
Prefer Not To Answer	12	2%
Asian	9	1%
Other	5	1%
American Indian or Alaska Native	1	0%
Not Sure	1	0%

Forsyth Futures' Parent/Caregiver Survey

Respondents by Household Income

Respondents were given the option to provide their household income. A breakdown of survey responses by household income are below.

Household Income of Survey Respondents

Race/Ethnicity	Number of Respondents	Percentage
Less than \$20,000	115	15%
\$20,000 to \$34,999	276	36%
\$35,000 to \$59,999	103	13%
\$60,000 to 99,000	107	14%
Over \$100,000	116	15%
Prefer not to answer	56	7%

Forsyth Futures' Parent/Caregiver Survey

Respondents by Household Size and Number of Children

Finally, the tables below show median and percentiles for the household size and number of children 0-7 in the home of survey respondents. The median, or 50th percentile, is the amount where half of all values are more than the given amount and half are less. The same concept holds true for the 25th and 75th percentiles. For example, the 25th percentile is the rate at which 25% of all values are less than the amount and 75% are more.

Household Size of Survey Respondents

25%	50% (Median)	75%
3	5	5

Forsyth Futures' Parent/Caregiver Survey

Number of Children 0-7 in the Home of Survey Respondents

25%	50% (Median)	75%
1	2	2

Forsyth Futures' Parent/Caregiver Survey