

Building the Foundation for the Future of Forsyth County

THE PRE•K PRIORITY

Pre-K Feasibility
Study Summary

April 2020



Based on Forsyth Futures Pre-K Feasibility Study

Introduction

The Pre-K Feasibility Study was conducted by Forsyth Futures, commissioned by Family Services on behalf of The Pre-K Priority, with funding provided by the Kate B. Reynolds Charitable Trust. It is the most comprehensive study ever undertaken of Forsyth County's Pre-Kindergarten (Pre-K) and early childcare system.

The study examines the supply and demand of Pre-K services through an assessment of current programs, staffing, and capacity, informed by surveys of parents, providers, teachers, and educators. Findings from the study will be used to guide the establishment of a universal, high-quality Pre-K system in Forsyth County.



PURPOSE

Extensive scientific research and economic analysis over the past forty years show that high-quality Pre-K programs are wise investments that help reduce educational achievement gaps for children and improve health and well-being far into adulthood. Forsyth County's educational achievement gap has persisted since consistent measurement began near the beginning of this decade, with nearly half of third grade students not proficient in reading, a rate that increases to more than two-thirds for children from minority and low-income families.

The Pre-K Priority has developed standards for the development of a system of high-quality Pre-K programs in Forsyth County that will help children enter Kindergarten ready to succeed in school and life. To determine the steps to implement such a system, the feasibility study draws together data to provide a detailed account of the current

Pre-K landscape in Forsyth County. Just as importantly, the study presents the perceptions, preferences, and needs for Pre-K services of families with young children. The study also examines the recommended standards for high-quality Pre-K programs, the extent to which they exist in current programs, and the perspectives of providers, teaching professionals, and parents regarding their importance and implementation.

METHODOLOGY

Throughout 2019, Forsyth Futures engaged in primary data collection and analysis, interviews, focus groups, and surveys for this study. During Phase One the focus was on mining existing data sets and conducting key informant interviews to gather quantitative information from stakeholders, parents, Pre-K program directors, teachers, and post-secondary instructors. The second phase focused on community surveying, including interviews and focus groups, to affirm that the Phase One findings were generalizable to all of Forsyth County.

Two local surveys were conducted to collect qualitative data. In the Parent/Caregiver Survey, more than 700 households (with children ages 0-5) shared their perceptions of Pre-K services. Forsyth Futures made extensive efforts to ensure that survey respondents were representative of the demographics of the community, particularly in regard to the participation of Hispanic/Latino families. The Childcare Provider Survey collected data from 75 Pre-K programs and childcare providers regarding enrollment, teaching staff, and willingness/interest to meet high-quality benchmarks related to The Pre-K Priority. To complete the analysis of the study, Forsyth Futures' researchers applied secondary data to further highlight population trends, Pre-K enrollment patterns, and identify where the gap between the demand for childcare and the supply of providers is the widest.

KEY FINDINGS

This report is a summary of the key findings for the full Pre-K Feasibility Study report that will soon be available at www.PreKPriority.org

Demographics

FOUR-YEAR-OLDS IN FORSYTH COUNTY

Forsyth County is home to approximately 4,600 four-year-olds. Though this number has declined since the 2010 census, it is expected to begin increasing by 2020. There are currently more non-white and/or Hispanic four-year-old children than white, non-Hispanic children: 44% White, 29% African American, 24% Hispanic/Latino, and 3% identifying as "Other." 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 some difficulty speaking English.

Nearly half of Forsyth County children under the age of five live in households where annual family income is \$40,000 or less. Approximately 24% of households have annual incomes between \$40,000-75,000, while 29% have incomes of \$75,000 and above. 65% of children are in households where parents work outside the home (including both single parent and two-parent families), indicating that some childcare arrangement is necessary.

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%

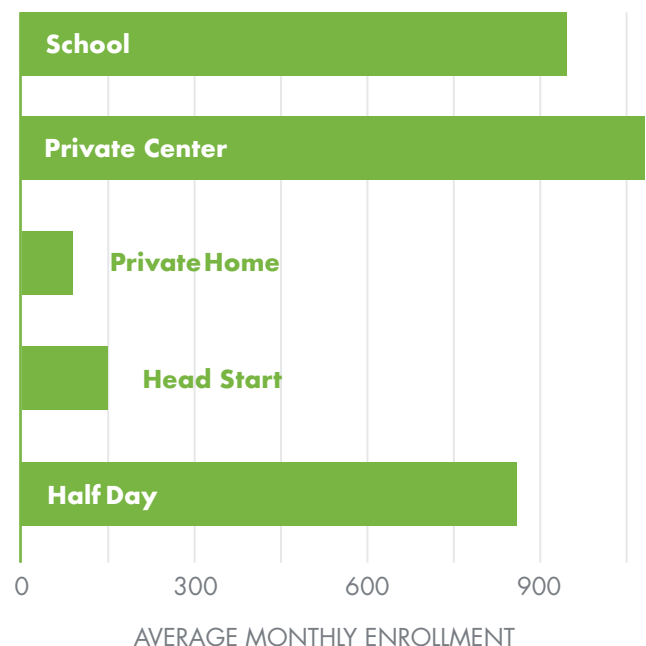
* US Census Bureau; American Community Survey
Five-Year Public Use Microdata Sample, 2017

PRE-K ENROLLMENT

Pre-K is provided in various settings throughout Forsyth County: in the Winston-Salem Forsyth County Schools (WS/FCS), Family Services' Head Start program, private licensed child care centers, faith-based facilities, and family child care homes.

Approximately 2,300 four-year-old children (nearly half the total number of four-year-olds in Forsyth County) are enrolled in formal care arrangements for at least 6.5 hours a day. Forsyth Futures estimates that there are also 586 five-year-olds enrolled in formal Pre-K arrangements, though because of how this data is collected differently across different providers, this number could be higher or lower by a considerable percentage. Additionally, an estimated 854 four- and five-year olds are enrolled in half-day programs that do not operate under the same requirements as state-licensed facilities. More uniform data collection in a coordinated system would make it easier for local leaders to gain a more detailed understanding of how families are using these services by age.

FOUR-YEAR-OLD ENROLLMENT BY FACILITY TYPE * *



**NC Child Care Statistical Report; Forsyth
Futures Provider Study; Family Services

Pre-K Capacity in Forsyth County

FACILITIES

Licensed child development centers in Forsyth County are operating at roughly 64% capacity across all age groups. Available data does not permit a precise estimate of the number of slots that would be specifically available for four-year-olds slots. The best estimate is that there are between 560 to 1,110 open slots for four-year-olds. Nonetheless, the current system would struggle to meet demand, if, as indicated by the parent surveys, 90% of parents were to enroll their children assuming cost were not a factor. Under that scenario, it is estimated there would be an undersupply of just under 1,000 slots.

Almost every ZIP code in the county has more children that are eligible for publicly-funded Pre-K classrooms than could be served by the existing supply of these classrooms. The 27105 and 27107 ZIP codes have the greatest difference between the numbers of children living there and children enrolled there – i.e., the number of four-year-old children living in these areas vs. the number enrolled in Pre-K across all facility types (including WS/FC Schools, Head Start, private and public childcare facilities, and half day providers).

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 to 238

*Forsyth Futures Provider Survey

TEACHERS

The Pre-K Priority's standard for the lead teacher education is a bachelor's degree and specialized training in a Pre-K area. However, the ideal credential is the Birth-Kindergarten (B-K) license. The study estimates that there are nearly enough individuals (167) with B-K licenses in the county to fill the number of classrooms (200) that would be needed to enroll 80% (3600) of Forsyth County four-year-olds in Pre-K – 80% being the accepted benchmark for a "universal" Pre-K system. Only 37% of current programs surveyed have B-K licensed teachers in four-year-old classrooms. 71% of provider respondents report difficulty recruiting lead teachers with a B-K license for four-year-old classrooms. However, 51% would be willing to meet such a standard with financial and other support. At the same time, there is a sizable pool of teachers with a Bachelor's Degree (or higher); administrators indicated that 89% of their teachers who did not currently have BK licenses would be willing to continue their education if resources were made available.

Teachers and providers alike identified several strategies necessary for retaining teachers and incentivizing current childcare professionals to pursue higher education. In addition to scholarship opportunities to cover the primary expenses of tuition and books, assistance with costs related to childcare and the praxis test fee are equally important. Academic support (especially for individuals with limited academic experience), mentorship, and help with navigating program requirements are crucial for students to attain higher credentials. In addition to increases in compensation and benefits corresponding to higher credentials, workplace morale and environment are cited as significantly influencing teacher retention.

The study finds that competition between providers to attract and retain teachers with higher levels of education makes it more challenging for some providers to meet these education goals. Private and religious-affiliated providers in particular expressed difficulties attracting and retaining teachers with BK licenses due to better compensated positions within the school system, and a few providers reported that this resulted in a hesitancy to encourage education. Overall, the findings underscore the importance of professional development strategies and compensation practices that allow all providers to recruit and maintain an educated workforce.

Pre-K Program Quality

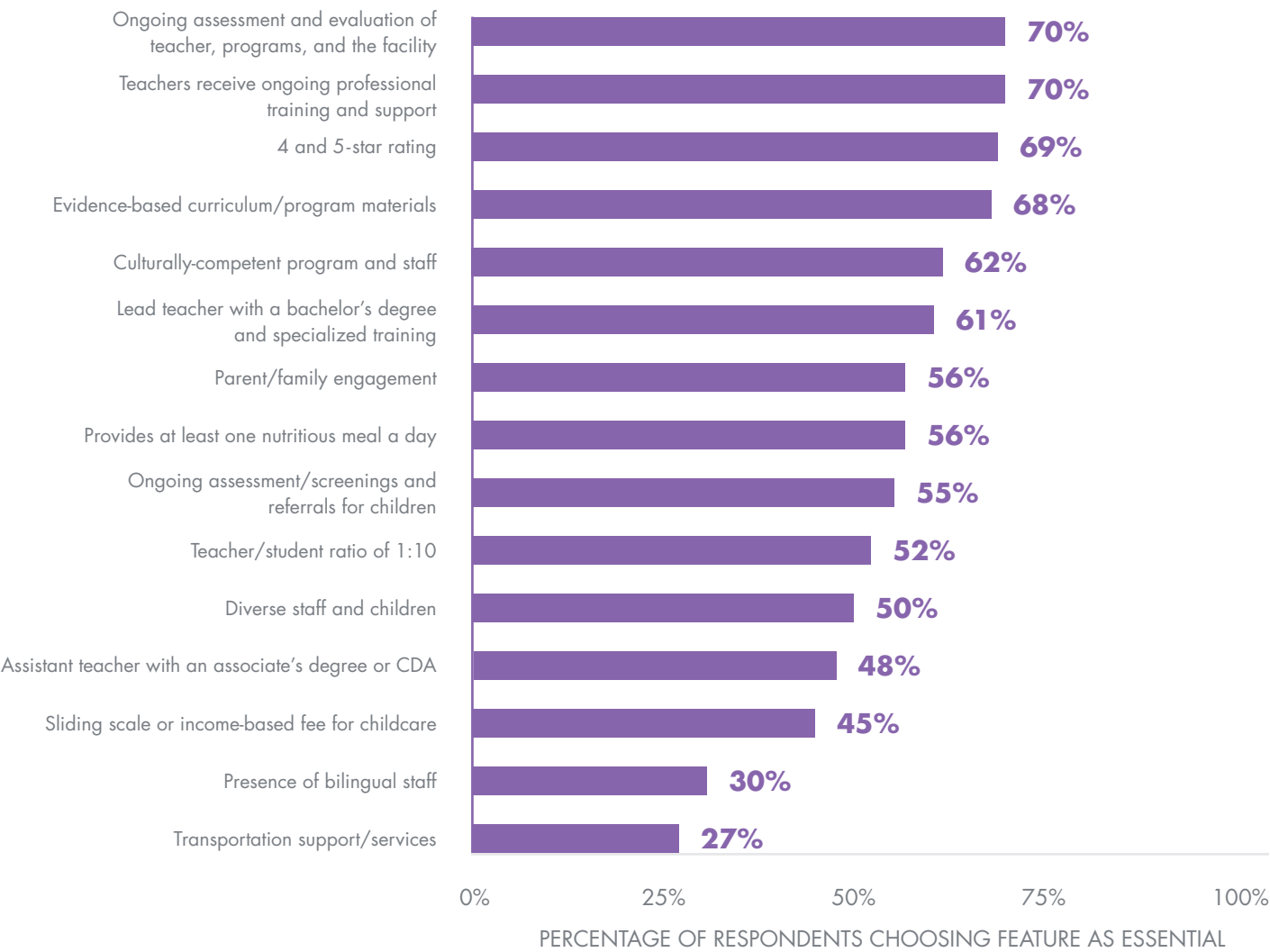
PARENT SATISFACTION WITH CURRENT CARE

77% of parents surveyed, across all races/ethnicities, report being “very satisfied” or “satisfied” with Pre-K/ preschool arrangements for their four-year-old children. All income groups report similar levels of satisfaction with their care arrangements. Parents were satisfied with the structure of the environment, teachers’ education level and their relationship with the families, progress reports, and take home materials. Despite evidence that there are enough four-year-old slots to meet current demand, 64% of parents consider there to be a lack of quality Pre-K slots. This reflects a major theme in the parent interviews and focus groups, i.e., the dearth of programs that are both affordable and high-quality.

PARENT PERCEPTIONS OF QUALITY PRE-K

When asked specifically about essential components of a high-quality Pre-K program, Parent survey respondents gave the highest marks (70% each) to ongoing assessment and evaluation, teachers receiving ongoing training and support, a four- or five-star rating, and evidence-based curriculum. Correspondingly, 60% of parents describe a lead teacher having a bachelor’s degree and specialized training in a Pre-K area as “Essential”, and 34% describe it as “Desirable”. In addition, 56% of parents view parent/family engagement as an essential feature in a high-quality program.

SURVEY RESPONDENTS CHOOSING QUALITY FEATURES AS ESSENTIAL



PREFERENCES AND OBSTACLES

Overall, parents favor locations close to home over those close to work. While close to home and close to work have equal percentages for desirability (51%), close to home has a much higher percentage as essential (43% compared to 30%). Families with low-incomes place importance on having programs close to public transportation. The areas of the county that have the greatest mismatch between the number of children living in a given area (regardless of income) and the number of children enrolled in publicly-funded Pre-K classrooms in that area are in 1) East Winston, 2) South of Salem Parkway, 3) the intersection of Salem Parkway and Interstate-40, and 4) the Kernersville area north of Salem Parkway.

Generally, parents express a preference for full-day care (8-9 hours), a schedule similar to the school system or year-round care, and an elementary school or private site settings. The most frequently reported barriers to enrollment are the cost of care (77%), limited availability of slots (58%), and the lack of 8-9 hour care (43%).

Only 20% of Hispanic/Latino respondents in the Parent Survey report having a child in a licensed childcare center compared to 45% of African American respondents and

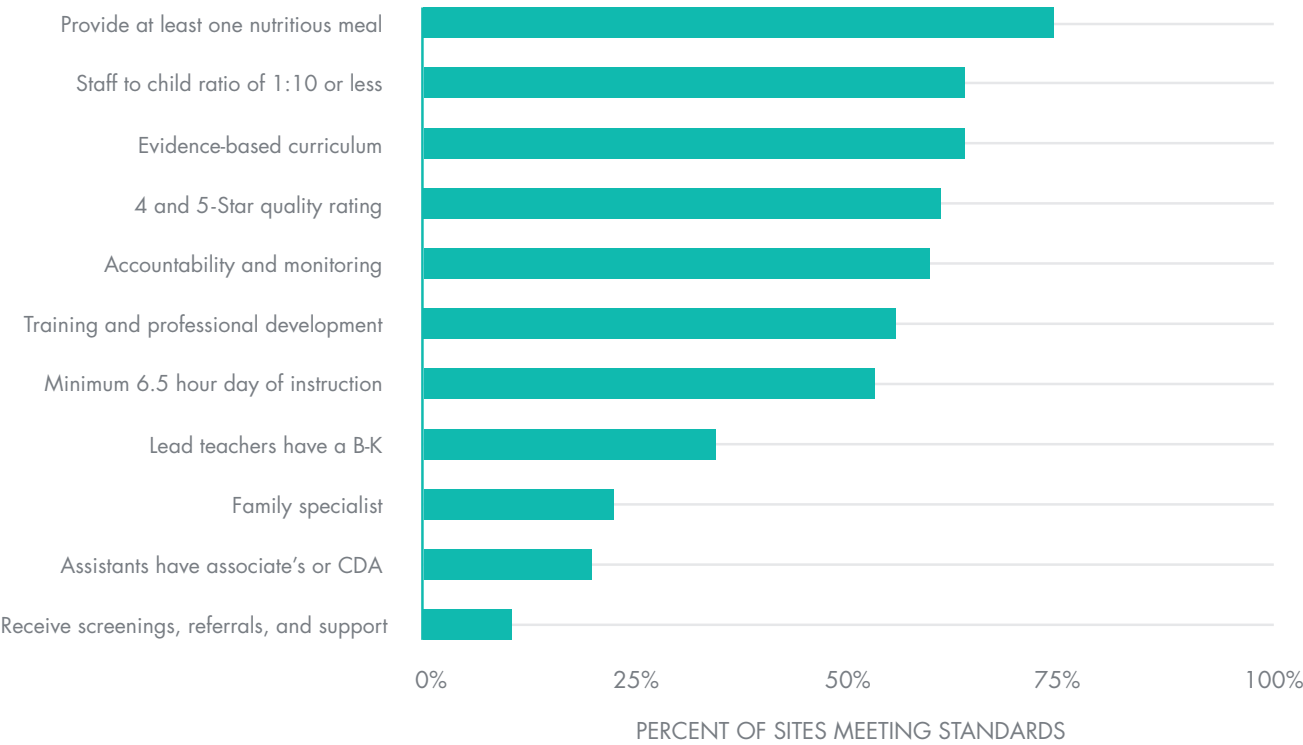
46% of white, non-Hispanic respondents. The Provider Survey finds more than half (53%) of current programs do not have bilingual staff.

QUALITY OF FORSYTH COUNTY PRE-K SYSTEM

The existing Pre-K system in Forsyth County consists of programs in a variety of settings, supported by various funding streams with differing eligibility criteria. This “non-system” lacks uniform standards. Many licensed programs do not meet the set of high-quality standards established by the Pre-K Priority, as illustrated in the diagram below.

In addition, the Pre-K Priority initiative has found that Forsyth County lags significantly behind other counties in the number of slots provided through the state-funded North Carolina Pre-K program (NC Pre-K), which is nationally recognized for its quality standards. 52% of four-year-olds in North Carolina are eligible for NC Pre-K and 47% of those that are eligible are served. However, in Forsyth County while just under 60% of four-year-olds are eligible for NC Pre-K, only 27% of those that are eligible are served. Were Forsyth County four-year-olds enrolled at the statewide level, over 500 more children would be served.

PERCENT OF SITES CURRENTLY MEETING EACH PRE-K PRIORITY STANDARD



HIGH-QUALITY PRE-K EXPANSION

The Pre-K Feasibility Study findings demonstrate that current Pre-K providers are not meeting all of the quality standards set out by the Pre-K Priority Initiative, and that there is available capacity in the Pre-K system that could be leveraged to serve more children. To that end, the Provider Survey asked current providers specifically about expansion as well as participation in a program with high-quality standards. 76% of current providers indicated willingness to expand their program’s capacity, although two out of three of those providers would be willing to participate only if resources were made available.

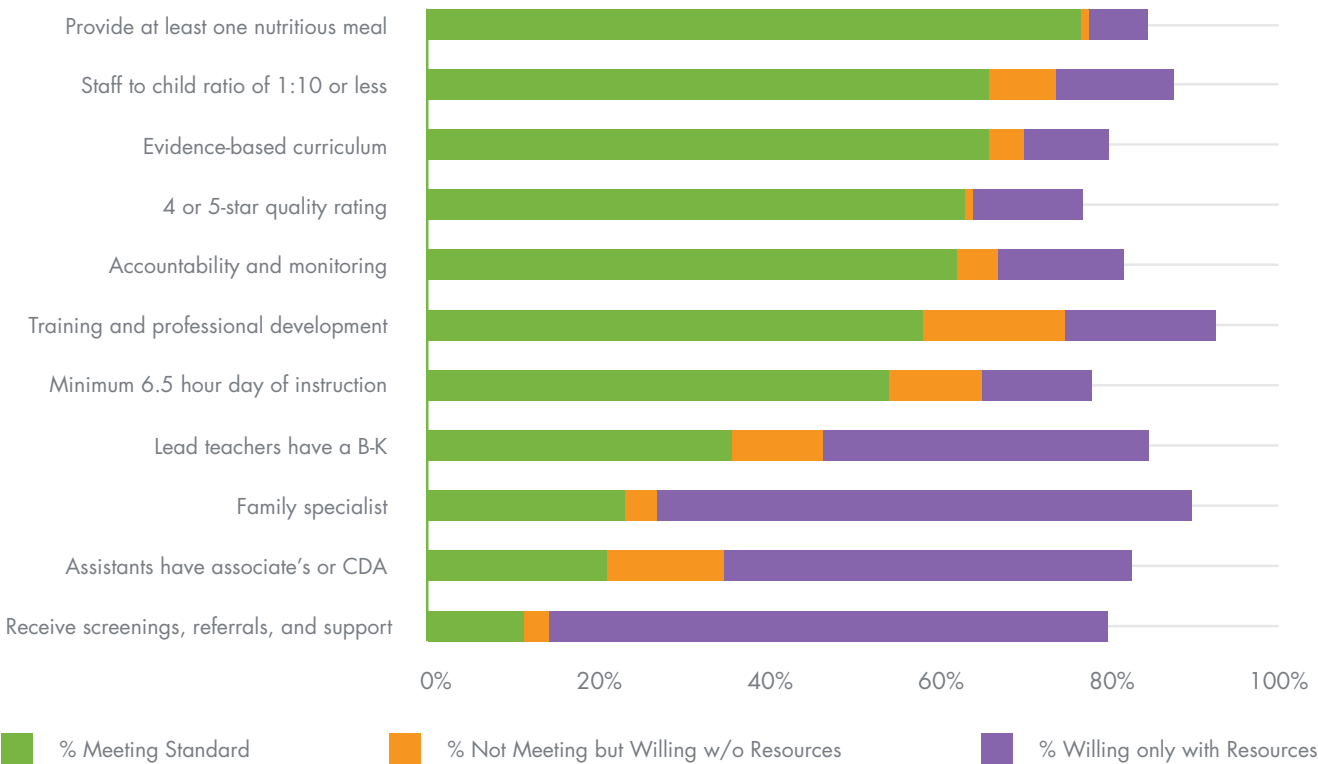
Provider survey responses in relationship to The Pre-K Priority quality benchmarks indicate that more than half of providers are willing to meet all of the standards but additional resources would be required to do so. About 67% report needing support to provide screenings and referrals, with 64% requiring support to provide a family specialist. Most Pre-K providers surveyed are willing and able to meet the lead teacher standard of a bachelor’s degree, but about 40% of providers can only meet this standard with additional resources and supports. Additionally, half of the respondents report needing support to ensure that assistant teachers have an associate’s degree or Child Development Accreditation

(CDA). It is noteworthy that the top five standards for which additional resources are needed are among the six standards that providers currently have the most difficulty meeting.

PROVIDERS’ WILLINGNESS AND ABILITY TO EXPAND *



PERCENTAGE OF PROVIDERS MEETING AND/OR WILLING TO MEET STANDARDS *



* Forsyth Futures Provider Survey

The Road to High-Quality Pre-K

Forsyth Futures has conducted a comprehensive study of the Pre-K landscape in Forsyth County. Their robust findings will help us chart a course toward a future when all four-year-old children in our community will have the opportunity to enroll in an affordable, high-quality Pre-K program.

Approximately half of the racially and economically diverse cohort of 4,600 Forsyth County four-year-olds attends some form of licensed childcare. While current programs share similarities according to mandated licensing requirements, no providers are meeting all of the quality standards established by the Pre-K Priority. Nonetheless, three-quarters of parents surveyed indicate they are satisfied with their existing Pre-K/preschool arrangements, citing the environment, teachers' education level, and their relationship with families. This finding corresponds to the high-quality standards set by Pre-K Priority. Parents also emphasized the importance of ongoing program assessment/evaluation, teachers with a bachelor's degree and specialized training in Pre-K, parent/family engagement, a four- or five-star license rating, and evidence-based curriculum.

Parents across all demographic categories believe there is a shortage of high-quality, affordable Pre-K programs in Forsyth County, although the study finds that providers have sufficient capacity to meet current demand. Families cite location, cost, and quality as the primary determinants and/or barriers to enrolling their children in a Pre-K program. The study found that 90% of parents would enroll their children in Pre-K if cost were not a factor. If that were to happen, the study estimates an undersupply of about 1,000 slots based on existing provider capacity. 76% of providers surveyed would be willing to expand capacity, though two-thirds of those would need additional resources to do so. At least 75% of all providers surveyed would be

willing to meet all of the proposed standards if the sufficient resources were made available. The quality standards that providers need the most assistance with include providing the full range of screenings and assessments, hiring assistant teachers with an associate's degree, actively engaging families, and employing teachers with a B-K license. Recruiting and retaining a qualified Pre-K workforce remains a significant challenge, due to issues such as providing fair and equitable compensation, supporting ongoing professional development, and obtaining higher education/credentials. At the same time, it is encouraging to find that there are about 400 Pre-K teachers in Forsyth County that have at least a bachelor's degree, and 41% of those have a B-K license.

“The study found that 90% of parents would enroll their children in Pre-K if cost were not a factor.”

The feasibility study clearly delineates the quality and capacity gaps in Forsyth County's Pre-K/preschool landscape. Parents affirmed the importance of having a choice of Pre-K settings—within the public schools, private childcare centers, and Head Start. Parents also concur with early learning professionals that high-quality program standards are required for their children to get the most out of the Pre-K experience. Altogether, these findings reinforce the importance of establishing a uniform system of diverse providers that meet high-quality standards, offer programs that are equitable and affordable for families, and attract, retain, and continue to develop well-qualified teachers.

The COVID-19 pandemic has made it clear that high-quality child development programs are an essential resource for American families and the American economy. The Pre-K Feasibility Study demonstrates that, with the investment of appropriate resources, Forsyth County early learning organizations have the capacity, the talent, and the willingness to create a high-quality system of Pre-K programs that incorporates the benchmark standards and best practices established by The Pre-K Priority.

THE PRE-K PRIORITY is a coalition of community organizations convened by Family Services.

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