



2023 Child Care Market Rate Survey



Prepared by:
School of Social Work
Rutgers, the State University of New Jersey

Prepared for:
New Jersey Department of Human Services
Division of Family Development

Table of Contents

| | |
|---|-----------|
| EXECUTIVE SUMMARY | 2 |
| INTRODUCTION | 5 |
| METHODOLOGY AND PROCESS | 6 |
| MARKET RATE SURVEY RESULTS | 7 |
| I. Survey Response Rate | 7 |
| II. Slots and Enrollment | 8 |
| Child age group served | 8 |
| Current and desired enrollment..... | 9 |
| III. Statewide Market Rates | 11 |
| Center providers' market rates | 11 |
| Family providers' market rates..... | 12 |
| Summer youth camp providers' market rates..... | 13 |
| Market rates for children with special needs | 14 |
| IV. State Assistance Rates Compared to Market Rates..... | 16 |
| Comparison using full-time monthly rates | 16 |
| Comparison using part-time monthly rates..... | 18 |
| V. Market Rate Variation by County..... | 18 |
| Center providers' rate variation..... | 18 |
| Family providers' rate variation..... | 21 |
| VI. Market Rate Variation by Rate Cluster..... | 22 |
| Center providers' rate variation..... | 22 |
| Family providers' rate variation..... | 23 |
| VII. Market Rate Variation by Quality Indicator | 24 |
| Variation by accreditation status..... | 24 |
| Variation by Grow NJ Kids star level | 25 |
| VIII. Extended Care Rates, Discounts, and Special Fees..... | 27 |
| Providers with expended and non-traditional hours of care | 27 |
| Extended and non-traditional care rates | 28 |
| Providers offering before-and after-school care for school-age children | 29 |
| Before-and after-school care rates | 29 |
| Other fees and discounts..... | 30 |
| Receipt of state grants and assistance | 31 |
| CHILD CARE SUPPLY ANALYSES | 32 |
| I. Estimated Numbers of Children and Child Care Slots | 32 |
| II. Children-to-Slots Ratio | 33 |
| III. Areas with a Potential Supply Gap..... | 34 |
| NARROW COST SURVEY RESULTS | 35 |
| I. Center Providers' Costs, Revenues, and Narrow Cost Rates..... | 36 |
| II. Family Providers' Costs, Revenues, and Narrow Cost Rate..... | 38 |
| MISCELLANEOUS ANALYSES | 39 |
| I. Days and Hours of Full-Time Care..... | 39 |
| II. Post-COVID Changes in Tuition, Enrollment, and Staff Size | 40 |
| III. Anticipated Changes in the Upcoming School Year | 42 |
| IV. Participation in the State Assistance Program | 43 |
| CONCLUSION | 44 |
| APPENDIX TABLES | 46 |
| 2023 MARKET RATE SURVEY INSTRUMENTS | 56 |
| I. Licensed Center Survey | 57 |
| II. Family Child Care Survey..... | 74 |
| III. Summer Youth Camp Survey | 91 |

EXECUTIVE SUMMARY

The New Jersey Department of Human Services, Division of Family Development (DHS/DFD) is the Lead Agency for the federal Child Care and Development Block Grant Act (CCDBG) of 2014. Section 658 (c) (4) of the CCDBG, and accompanying Child Care Development Fund (CCDF) regulations at 45 CFR Part 98 require states to conduct a child care market rate survey every three years to collect up-to-date rate information and to use the information in setting state child care rates.

The federal law also requires states to certify that child care assistance rates are sufficient to ensure eligible children have equal access to child care services as children who are not eligible for child care assistance. The benchmark for providing equal access established by the CCDF Final Rule (63 FR 39959) is the 75th percentile rate in the current child care market. Rates set at the 75th percentile or higher are considered as providing equal access.

To meet this requirement, the Rutgers School of Social Work, under contract with DHS/DFD conducted the Market Rate Survey (MRS). The primary purpose of the survey was to: (1) collect up-to-date child care market rate data and estimate the 50th and 75th percentile rates by provider type, child age group, geographic locations, and quality indicators; (2) compare the 75th percentile market rates to the state assistance rates; (3), examine child care supply and identify areas with potential supply gaps, and (4) estimate the basic (narrow) costs of operating a child care program from providers' perspectives.

Methodology

DHS/DFD collaborated with the Rutgers School of Social Work to develop online survey instruments for a market rate survey (MRS). The MRS was distributed weekly from August to November 2023 to licensed center providers, registered family providers, and summer youth camp providers to solicit maximum survey participation. The survey instruments included questions related to child care rates for children with special needs, changes in tuition, staffing, and enrollment, as well as providers' receipt of state grants and participation in the child care assistance program. Separate online survey instruments were developed for a narrow cost analysis (NCA) using the Provider Cost of Quality Calculator (PCQC). The NCA survey instruments were distributed in December 2023 to subsamples of center providers and family providers who indicated their interest in the survey.

The statistical analysis estimated the statewide 75th percentile market rates; compared the market rates to the state assistance rates; and examined the rate variations by county, geographic rate cluster, and quality indicators. The statewide child care supply was examined with the children-to-slots ratio by comparing the number of young children below age six with the number of available child care slots by zip code area. Additionally, based on the NCA survey data, the providers' narrow cost rates were

estimated and compared to the state assistance rates.

Findings

The statewide MRS response rate was 65.38% for center providers (2599 respondents out of 3975 providers), and 67.61% for family providers (837 respondents out of 1238 providers). Below is the list of major findings.

The 75th Percentile Market Rates Compared to State Assistance Rates

Executive Summary Table 1 below summarizes the statewide 75th percentile monthly market rates by provider type, full-time status, and child age group. When the state full-time monthly assistance rates were ranked on the distribution of center providers' market rates, the results suggest that the state assistance rate for infants was at the 50th percentile, the rate for toddlers was at the 45th percentile, the rate for preschoolers was at the 46th percentile and the rate for school-age children was at the 68th percentile.

Center providers' 75th percentile monthly full-time rates for children with special needs were slightly higher than those without special needs.

Executive Summary Table 1: State assistance rates (\$) compared to the 75th percentile market rates (\$)

| | Center Providers | | | Family Providers | | |
|------------------|---|------------------------------------|--|---|------------------------------------|--|
| | 75 th percentile market rate | State assistance rate ¹ | State assistance rates' percentile placement on the market rate distribution | 75 th percentile market rate | State assistance rate ¹ | State assistance rates' percentile placement on the market rate distribution |
| Full-Time | | | | | | |
| Infant | 1750 | 1549 | 50 th | 1250 | 1188 | 55 th |
| Toddler | 1625 | 1372 | 45 th | 1200 | 1188 | 65 th |
| Preschooler | 1462 | 1226 | 46 th | 1140 | 1041 | 65 th |
| School-age | 1213 | 1167 | 68 th | 1080 | 1041 | 70 th |

1. The assistance rates include a \$300 monthly differential payment.

Market Rate Variations by Geographic Location

The market rates varied substantially by county. For example, Cumberland, Atlantic, and Warren Counties had the lowest full-time monthly rates for toddlers (\$1,028, \$1,257, and \$1,275 respectively), and Somerset, Union, and Hudson Counties had the highest rates (\$1,800, \$1,795, and \$1,790 respectively). Family providers' rates also varied by county, but the rate variation was smaller compared to the variation observed in center providers' rates.

Executive Summary Table 2 shows how the market rates varied by rate cluster, created based on the composite rankings of zip code areas' 75th percentile market rates for all

child age groups and all rate modes. Family providers' rates also varied by cluster, but the range of variation was smaller compared to center providers.

Executive Summary Table 2: The 75th percentile full-time monthly rates by rate cluster

| Cluster | Center Providers | | | | Family Providers | | | |
|---------|------------------|---------|-------------|------------|------------------|---------|-------------|------------|
| | Infant | Toddler | Preschooler | School-Age | Infant | Toddler | Preschooler | School-Age |
| 1 | 1375 | 1260 | 1160 | 920 | 1188 | 1100 | 1000 | 962 |
| 2 | 1550 | 1415 | 1280 | 1167 | 1200 | 1200 | 1080 | 1060 |
| 3 | 1723 | 1600 | 1445 | 1300 | 1300 | 1201 | 1200 | 1105 |
| 4 | 1920 | 1800 | 1700 | 1630 | 1500 | 1400 | 1300 | 1300 |

Market Rate Variations by Quality Indicators

For center providers, accreditation status and Grow NJ Kids (GNJK) star level were used as the quality indicators. Around 15% of center programs reported that they were accredited, and their full-time market rates were consistently higher than their non-accredited counterparts for all child age groups. For example, the 75th percentile full-time monthly rate for preschoolers was \$1,606 for accredited programs and \$1,440 for non-accredited programs.

Another quality indicator used for center providers was participation in NJ's quality rating improvement system, Grow NJ Kids. Of 811 center providers participating in GNJK, 17.51% (n=142) and 10.73% (n=87) were rated 3 and 4. As only two center providers had a star level of 5, their data are not presented here. Although the state assistance rates are higher for providers with 3, 4, and 5 stars, the market rates were not necessarily higher for providers with higher GNJK star levels as shown in Executive Summary Table 3.

Executive Summary Table 3: The 75th percentile full-time monthly rates by GNJK star level/participation status

| GNJK Star Level | Center Providers | | | |
|----------------------|------------------|---------|-------------|------------|
| | Infant | Toddler | Preschooler | School-Age |
| 1 (n=461) | 1700 | 1580 | 1450 | 1240 |
| 2 (n=119) | 1549 | 1400 | 1320 | 1167 |
| 3 (n=142) | 1653 | 1545 | 1295 | 1167 |
| 4 (n=87) | 1745 | 1504 | 1400 | 1100 |
| Participation Status | Family Providers | | | |
| | Infant | Toddler | Preschooler | School-Age |
| Yes (n=112) | 1239 | 1200 | 1140 | 1082 |
| No (n=725) | 1300 | 1200 | 1192 | 1027 |

Participation in the GNJK program was used as the quality indicator for family providers. As presented in Executive Summary Table 3 above, family providers' market rates did not vary by GNJK participation status.

Child Care Supply

To examine if families with young children in any part of the state might have experienced difficulty accessing child care services, the number of young children per available child care slots in a zip code area was estimated using a children-to-slots ratio. While 84% of young children in the state did not appear to have experienced a supply gap, nine zip code areas with extremely high children-to-slots ratios were identified.

Narrow Cost Rates

Analyses of the NCA survey data suggest that nearly 65% of the center providers' total costs were personnel costs, 18% were building costs, and 17% were program costs. As for their revenue sources, approximately 40% of their total revenues were from tuition, and 37% were from the state child care assistance program. Grant and other revenue sources were about 17.80% and 5.35% of their total revenues.

Center providers' 75th percentile full-time monthly narrow cost rate was estimated to be \$1,636 for children of all age groups, which was similar to the 75th percentile market rates for toddlers (\$1,625) compared to the state assistance rate of \$1,372 for toddlers.

The full-time monthly narrow cost rates were \$1,607 for center providers serving infants and toddlers, \$1,663 for those serving preschoolers, and \$1,541 for providers serving school-age children. The narrow cost rates for center providers were higher for small programs (\$2,076) than for large programs (\$1,338) and programs with higher GNJK star levels (\$1,835) than those with lower star levels (\$1,459). It is noteworthy that only a small fraction of providers participated in the NCA survey; therefore, limiting the statistical confidence of these estimates.

Similarly, family providers' full-time monthly narrow cost rate was estimated to be about \$1,219 for children of all age groups, which was similar to the 75th percentile market rate of \$1,200 for toddlers, and slightly higher than the state assistance rate of \$1,188 for toddlers.

INTRODUCTION

The Child Care and Development Block Grant (CCDBG) Act of 2014 requires state Lead Agencies to conduct a child care market rate survey every three years to receive funding from the Child Care and Development Fund (CCDF). The survey's objective is to find out what the general population pays for child care providers' services so that state child care assistance rates can be set to allow CCDF families equal access to the full range of child care available to families not receiving the assistance. The CCDBG Act mandates that the survey examines how the child care market rates vary by provider type, child age

group, geographic area, rate mode, and quality of care. The Act also specifies that the survey conducts a narrow cost analysis of child care to examine the costs of operating a child care program. The 75th percentile payment rate was established as a benchmark for CCDF by the preamble to the 1998 Final Rule (63 FR 39959). Setting rates at the 75th percentile demonstrates that CCDF families have access to at least three-quarters of available child care.

METHODOLOGY AND PROCESS

As New Jersey's lead agency, the New Jersey Department of Human Services' Division of Family Development (DHS/DFD) established a contract with a research team at Rutgers School of Social Work. The research team and the DHS/DFD collaborated to develop online survey instruments for a market rate survey (MRS). The MRS online survey instruments were distributed weekly - from August to November of 2023 - to the entire universe of fee-charging child care providers, including licensed center providers (N=3975), registered family providers (N=1238), and summer youth camp providers (N=1045) to solicit maximum survey participation. Family providers received the online survey in both English and Spanish.

In addition to the questions necessary for the MRS, the MRS instruments included questions related to child care rates for children with special needs and changes in tuition, staffing, and enrollment that the providers experienced last year. Questions about providers' receipt of state grants and participation in the child care assistance program were also added to the MRS instruments. The MRS instruments are found by clicking on the following links: (1) [center providers](#), (2) family providers ([English](#) and [Spanish](#)), and (3) [summer youth camp providers](#).

Separate online survey instruments were developed for a narrow cost analysis (NCA) using the Provider Cost of Quality Calculator (PCQC), a tool made available by the U.S. Office of Child Care. The instruments were distributed in December 2023 to subsamples of center providers (N=1080) and family providers (N=507) who indicated their interest in the survey from the MRS. In finalizing the MRS and NCA survey instruments, the DHS/DFD sought comments from child care organizations in the state. The NCA survey instruments are available at the following links: (1) [center providers](#) and (2) [family providers](#).

The collected MRS data were cleaned to correct inaccurate providers' IDs, and to remove invalid answers, and then were brought into SAS for statistical analyses. The SAS data files were merged with the providers' files by providers' IDs so that important administrative data on the providers' lists (e.g., licensed capacities and Grow NJ Kids [GNJK] star levels) were available for statistical analyses.

The collected NCA data were also cleaned in the same way that the MRS data were cleaned and then were converted to SAS data files for statistical analyses. The NCA data files were further merged with the MRS data files that were already merged with the

providers' lists so that all providers' information could be available for the NCA statistical analyses.

The data analyses began with observing the survey response rates and providers' slots and enrollment, as follows:

1. The first statistical analysis estimated the statewide 75th percentile market rates by provider type (center, family, and camp providers), child age group (infants, toddlers, preschoolers, and school-age children), hours of care (full-time vs. part-time), and rate mode (daily, weekly, and monthly). In estimating the statewide 75th percentile market rates, providers' maximum licensed capacities were used as the weight variables in the statistical analyses.
2. The second analysis compared the 75th percentile market rates to the state assistance rates to understand where the assistance rates fell on the distributions of the market rates.
3. The third set of analyses examined how the 75th percentile rates varied by county, geographic rate cluster (from the least expensive to the most expensive areas), and quality indicators (accreditation status and GNJK star level). Note that the same weighting procedures mentioned above – using the providers' maximum licensed capacities - were applied to create geographic rate clusters. More information about how the rate cluster was created will be provided in the section below.
4. The fourth analysis looked at market rates for extended care, special fees, and discounts. As for the fifth analysis, the statewide child care supply was examined with the children-to-slots ratio, by comparing the number of young children below age six with the number of available child care slots by zip code area. More details on the comparison method will be discussed in the relevant section below.
5. Additionally, based on the NCA survey data, the providers' narrow cost rates were estimated and then compared to the state assistance rates.
6. Lastly, the analyses examined the providers' days and hours of service, anticipated changes in tuition, enrollment, and staffing as a result of the COVID health emergency, and providers' participation in the state child care assistance program.

MARKET RATE SURVEY RESULTS

I. Survey Response Rate

The MRS universe comprised 3,975 centers licensed in 2023 by the New Jersey Office of Licensing. All those centers were invited to participate in the MRS, and 65.38% (n=2,599) participated in the survey. Of the respondents, 94 were free programs that did not charge fees (Head Start, Early Head Start, and free public programs), and the remaining 2,505 were fee-charging centers and programs eligible for the MRS.

The MRS was distributed weekly from August to November 2023 to licensed center providers, registered family providers, and summer youth camp providers to solicit maximum survey participation.

A total of 1,238 family providers were invited to the MRS, and 837 participated in the survey, leaving the response rate at 67.61%. Among the 1,045 summer youth camps invited to the survey, 29.95% (n=313) participated in the survey.

Table 1. Percentage (%) responded to MRS by provider type

| Center Provider | | | Family Provider | | | Summer youth Camp Provider | | |
|-----------------|------------------|--------------|-----------------|------------------|--------------|----------------------------|------------------|--------------|
| Universe | Number responded | % | Universe | Number responded | % | Universe | Number responded | % |
| 3,975 | 2,599 | 65.38 | 1,238 | 837 | 67.61 | 1,045 | 313 | 29.95 |

Table A-1 in the Appendix presents the response rates by provider type and county. As the table shows, the response rate varied substantially by county. For example, nearly 87% of center providers in Hunterdon County participated in the MRS, but only 42% of center providers in Union County participated. Similarly, while 90% of Camden County's family providers participated in the survey, only about 29% of Cape May County's family providers did so. For the counties with a low MRS response rate, the estimated market rates may not be representative of the particular county.

II. Slots and Enrollment

Child age group served

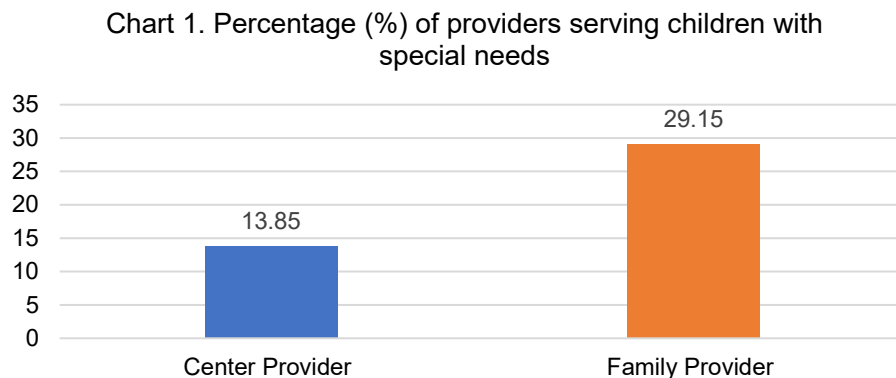
The MRS asked providers to identify all child age groups that they serve. As Table 2 below shows, approximately half of the responding center providers served infants and toddlers (48% and 55%, respectively). Most center providers (79%) served preschoolers, and 62% served school-age children.

Table 2. Percentage (%) of providers serving a specific age group by provider type

| | Center Provider | Family Provider | Summer Youth Camp Provider |
|-------------|-----------------|-----------------|----------------------------|
| Infant | 48.02 | 82.20 | |
| Toddler | 55.02 | 83.15 | |
| Preschooler | 79.26 | 78.73 | 23.64 |
| School-Age | 62.49 | 63.80 | 96.81 |

Compared to center providers, a larger share of family providers served infants and toddlers (82% and 83%, respectively). Similar to the center providers, 79% of the family providers served preschoolers, and 64% of them served school-age children. Among summer youth camp providers, nearly all (97%) served school-age children, while only a quarter (24%) of youth camps served preschoolers.

As Chart 1 shows, approximately 14% of center providers and 29% of family providers reported serving children with special needs.



Current and desired enrollment

As Table 3 below shows, 13,619 infants, 27,206 toddlers, 70,723 preschoolers, and 42,330 school-age children were enrolled in the responding center programs, totaling 153,878 children of all age groups. According to the MRS respondents, the enrollment of each age group was lower than the enrollment the providers had desired. Infant and toddler enrollments were at around 67% and 73% of the levels that the respondents desired, and preschooler and school-age enrollments were at 78% and 59% of the desired levels.

The family providers that responded to the MRS had a total of 2,170 children enrolled - 386 infants, 761 toddlers, 474 preschoolers, and 549 school-age children. These enrollment numbers were only at 42% and 53% of the desired enrollment for infants and preschoolers. For toddlers and school-age children, the enrollment levels were 66% and 73% of the enrollment levels that the responding family providers desired.

For summer youth camp providers, school-age children’s enrollment level reached nearly 91% of the desired enrollment level. Tables A-2 through A-4 in the Appendix present detailed data on the current and desired enrollments by provider type and county.

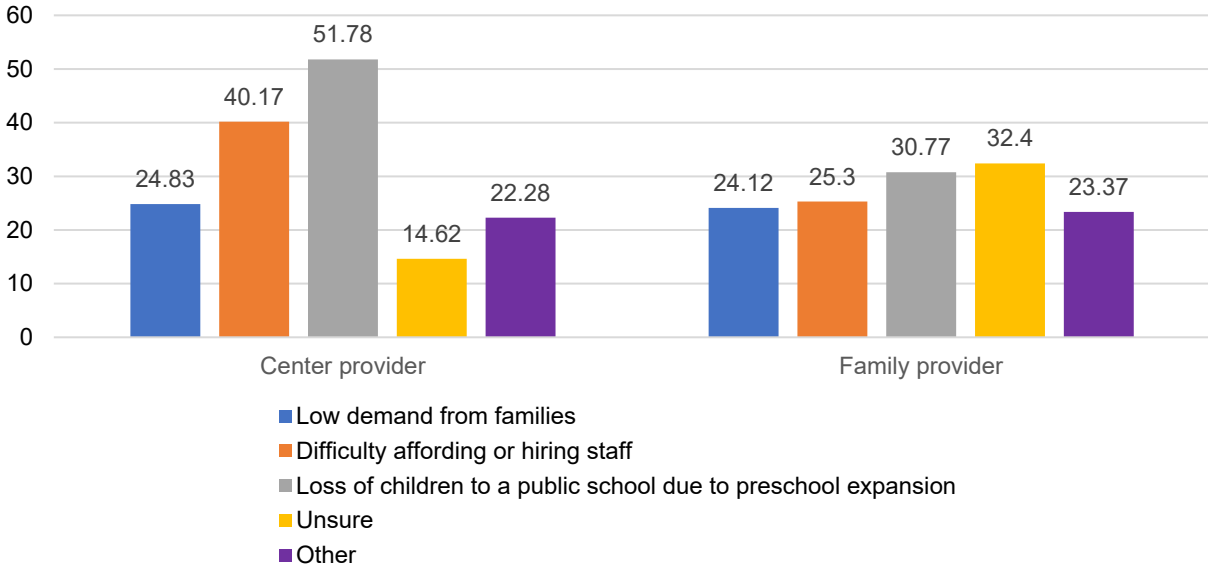
Table 3. Percentage (%) of current enrollment vs. desired enrollment, by provider type

| | Center Provider | Family Provider | Summer youth Camp Provider |
|--------------------|-----------------|-----------------|----------------------------|
| Infant | 67.07 | 42.19 | -- |
| Desired enrollment | 20,305 | 915 | -- |
| Current enrollment | 13,619 | 386 | -- |
| Toddler | 72.52 | 66.29 | -- |
| Desired enrollment | 37,513 | 1,148 | -- |
| Current enrollment | 27,206 | 761 | -- |

| | | | |
|--------------------|--------------|--------------|--------------|
| Preschooler | 77.92 | 53.38 | -- |
| Desired enrollment | 90,764 | 888 | -- |
| Current enrollment | 70,723 | 474 | -- |
| School-age | 58.71 | 73.11 | 90.64 |
| Desired enrollment | 72,101 | 751 | 31,680 |
| Current enrollment | 42,330 | 549 | 28,714 |

Providers were asked to identify reasons for lower-than-desired enrollment levels. Chart 2 shows that slightly more than half of the center providers (52%) identified the loss of children to a public school - due to public preschool expansion programs - as one of the reasons. More than 40% of the responding center providers reported difficulty affording or hiring staff as a reason. Nearly 31% of family providers also identified public preschool expansion as one of the reasons for lower-than-desired enrollment.

Chart 2. Percentage (%) of providers identifying reasons for lower-than -desired enrollment



Providers who identified other reasons for lower than desired enrollment were offered a text field option to enter their reasons. Center providers pointed out the high costs of care, parents' flexible and hybrid work schedules, and competition with other providers. On the other hand, many family providers pointed out that the regulatory requirement that limits the number of children they are allowed to care for at any given time is one of the reasons why their programs had lower-than-desired enrollment.

III. Statewide Market Rates

Center providers' market rates

Tables 4 and 5 below present center providers' market rates for full-time and part-time care at five percentile intervals by child age group in three rate modes (daily, weekly, and monthly). Table 4 shows that the **75th percentile full-time monthly rates were \$1,750 for infants, \$1,625 for toddlers, \$1,462 for preschoolers, and \$1,213 for school-age children.**

Table 4. Center providers' full-time market rates (\$) at five percentile intervals, by child age group and rate mode

| | Infant | | | Toddler | | | Preschooler | | | School-Age | | |
|------------------|--------|--------|-------------|---------|--------|-------------|-------------|--------|-------------|------------|--------|-------------|
| | Daily | Weekly | Monthly | Daily | Weekly | Monthly | Daily | Weekly | Monthly | Daily | Weekly | Monthly |
| 20 th | 61 | 299 | 1295 | 55 | 270 | 1140 | 48 | 230 | 955 | 28 | 140 | 410 |
| 25 th | 65 | 305 | 1350 | 60 | 280 | 1200 | 50 | 248 | 1000 | 31 | 150 | 488 |
| 30 th | 67 | 320 | 1400 | 60 | 295 | 1260 | 54 | 255 | 1080 | 36 | 174 | 560 |
| 35 th | 70 | 330 | 1430 | 63 | 300 | 1300 | 55 | 271 | 1132 | 40 | 189 | 625 |
| 40 th | 72 | 344 | 1488 | 64 | 310 | 1340 | 57 | 280 | 1191 | 45 | 200 | 720 |
| 45 th | 72 | 350 | 1525 | 65 | 317 | 1372 | 59 | 285 | 1220 | 50 | 220 | 800 |
| 50 th | 75 | 357 | 1549 | 69 | 325 | 1400 | 60 | 295 | 1250 | 54 | 235 | 900 |
| 55 th | 76 | 363 | 1592 | 71 | 333 | 1450 | 63 | 300 | 1290 | 55 | 250 | 1000 |
| 60 th | 78 | 375 | 1625 | 74 | 346 | 1500 | 66 | 307 | 1325 | 57 | 270 | 1100 |
| 65 th | 81 | 382 | 1665 | 75 | 353 | 1525 | 70 | 319 | 1377 | 60 | 275 | 1150 |
| 70 th | 83 | 395 | 1709 | 78 | 364 | 1575 | 72 | 326 | 1415 | 65 | 283 | 1183 |
| 75 th | 86 | 400 | 1750 | 82 | 375 | 1625 | 75 | 345 | 1462 | 70 | 300 | 1213 |
| 80 th | 90 | 415 | 1790 | 85 | 384 | 1685 | 80 | 354 | 1530 | 75 | 317 | 1350 |
| 85 th | 97 | 427 | 1830 | 94 | 404 | 1750 | 86 | 375 | 1600 | 82 | 346 | 1438 |
| 90 th | 109 | 448 | 1940 | 100 | 423 | 1833 | 96 | 398 | 1700 | 98 | 375 | 1550 |
| 95 th | 123 | 475 | 2100 | 121 | 455 | 2000 | 117 | 444 | 1925 | 125 | 420 | 1728 |

Table 5 below shows that the **75th percentile part-time monthly rates were \$1,255 for infants, \$1,204 for toddlers, \$1,090 for preschoolers, and \$867 for school-age children.** In general, the part-time monthly rates were approximately 70-75% of the full-time monthly rates across different age groups. Center providers' part-time market rates were more than half the compatible full-time rates.

Table 5. Center providers' part-time market rates (\$) at five percentile intervals, by child age group and rate mode

| | Infant | | | Toddler | | | Preschooler | | | School-Age | | |
|------------------|--------|--------|---------|---------|--------|---------|-------------|--------|---------|------------|--------|---------|
| | Daily | Weekly | Monthly | Daily | Weekly | Monthly | Daily | Weekly | Monthly | Daily | Weekly | Monthly |
| 20 th | 38 | 189 | 774 | 35 | 173 | 700 | 30 | 148 | 560 | 20 | 100 | 280 |
| 25 th | 39 | 195 | 820 | 38 | 184 | 748 | 30 | 150 | 600 | 25 | 116 | 340 |
| 30 th | 40 | 210 | 865 | 40 | 198 | 800 | 32 | 160 | 636 | 27 | 127 | 400 |
| 35 th | 45 | 220 | 920 | 41 | 206 | 854 | 35 | 175 | 682 | 27 | 135 | 464 |
| 40 th | 48 | 230 | 961 | 45 | 216 | 910 | 37 | 180 | 720 | 28 | 140 | 525 |

| | | | | | | | | | | | | |
|------------------|----|-----|-------------|----|-----|-------------|----|-----|-------------|----|-----|------------|
| 45 th | 50 | 244 | 1000 | 47 | 225 | 950 | 40 | 192 | 779 | 30 | 150 | 575 |
| 50 th | 50 | 250 | 1050 | 49 | 240 | 1000 | 43 | 200 | 832 | 30 | 150 | 584 |
| 55 th | 54 | 265 | 1100 | 50 | 250 | 1050 | 45 | 216 | 892 | 35 | 160 | 610 |
| 60 th | 56 | 275 | 1150 | 53 | 259 | 1091 | 48 | 226 | 942 | 36 | 175 | 675 |
| 65 th | 57 | 285 | 1191 | 55 | 272 | 1128 | 50 | 238 | 995 | 40 | 185 | 730 |
| 70 th | 60 | 290 | 1223 | 58 | 280 | 1165 | 51 | 247 | 1030 | 45 | 200 | 780 |
| 75 th | 63 | 300 | 1255 | 60 | 288 | 1204 | 54 | 258 | 1090 | 50 | 223 | 867 |
| 80 th | 66 | 310 | 1301 | 64 | 300 | 1290 | 58 | 270 | 1150 | 50 | 239 | 995 |
| 85 th | 72 | 320 | 1395 | 70 | 312 | 1350 | 63 | 283 | 1238 | 56 | 258 | 1080 |
| 90 th | 78 | 335 | 1470 | 75 | 332 | 1450 | 71 | 300 | 1305 | 65 | 280 | 1150 |
| 95 th | 95 | 367 | 1623 | 88 | 363 | 1595 | 80 | 330 | 1450 | 75 | 325 | 1300 |

Family providers' market rates

The following Tables 6-7 show family providers' full-time and part-time market rates at five percentile intervals by child age group and rate mode.

Table 6. Family providers' full-time market rates (\$) at five percentile intervals, by child age group and rate mode

| | Infant | | | Toddler | | | Preschooler | | | School-Age | | |
|------------------|--------|--------|-------------|---------|--------|-------------|-------------|------------|-------------|------------|------------|-------------|
| | Daily | Weekly | Monthly | Daily | Weekly | Monthly | Daily | Weekly | Monthly | Daily | Weekly | Monthly |
| 20 th | 48 | 223 | 1000 | 45 | 200 | 800 | 40 | 190 | 800 | 30 | 150 | 600 |
| 25 th | 50 | 250 | 1000 | 45 | 225 | 900 | 40 | 200 | 800 | 35 | 150 | 600 |
| 30 th | 50 | 250 | 1000 | 48 | 230 | 960 | 45 | 220 | 800 | 40 | 175 | 700 |
| 35 th | 50 | 250 | 1000 | 50 | 240 | 1000 | 45 | 210 | 900 | 40 | 200 | 800 |
| 40 th | 54 | 250 | 1080 | 50 | 250 | 1000 | 48 | 225 | 950 | 40 | 200 | 800 |
| 45 th | 55 | 274 | 1100 | 50 | 250 | 1000 | 48 | 240 | 970 | 45 | 200 | 800 |
| 50 th | 55 | 275 | 1120 | 54 | 250 | 1080 | 50 | 240 | 1000 | 46 | 200 | 900 |
| 55 th | 56 | 280 | 1188 | 55 | 270 | 1100 | 50 | 250 | 1000 | 48 | 225 | 962 |
| 60 th | 60 | 280 | 1200 | 55 | 275 | 1100 | 50 | 250 | 1000 | 50 | 240 | 1000 |
| 65 th | 60 | 300 | 1200 | 60 | 279 | 1188 | 54 | 250 | 1041 | 50 | 240 | 1000 |
| 70 th | 60 | 300 | 1200 | 60 | 300 | 1200 | 55 | 270 | 1096 | 50 | 250 | 1041 |
| 75 th | 64 | 305 | 1250 | 60 | 300 | 1200 | 60 | 280 | 1140 | 55 | 250 | 1080 |
| 80 th | 66 | 325 | 1300 | 63 | 300 | 1200 | 60 | 300 | 1200 | 60 | 275 | 1123 |
| 85 th | 70 | 350 | 1300 | 65 | 320 | 1300 | 60 | 300 | 1200 | 60 | 300 | 1200 |
| 90 th | 75 | 350 | 1400 | 75 | 350 | 1400 | 70 | 320 | 1300 | 70 | 300 | 1200 |
| 95 th | 80 | 400 | 1600 | 90 | 375 | 1517 | 84 | 350 | 1400 | 93 | 375 | 1430 |

Table 6 presents that family providers' **75th percentile full-time monthly rates were \$1,250 for infants, \$1,200 for toddlers, \$1,140 for preschoolers, and \$1,080 for school-age children.**

According to Table 7 below, family providers' 75th percentile part-time monthly rates were \$800 for infants and toddlers, \$720 for preschoolers, and \$650 for school-age children. These part-time monthly rates were around 60-67% of the full-time monthly rates for the

same age group. As with center providers' rates, family providers' part-time market rates were more than half the compatible full-time rates.

Table 7. Family providers' part-time market rates (\$) at five percentile intervals, by child age group and rate mode

| | Infant | | | Toddler | | | Preschooler | | | School-Age | | |
|------------------|--------|--------|------------|---------|--------|------------|-------------|--------|------------|------------|--------|------------|
| | Daily | Weekly | Monthly | Daily | Weekly | Monthly | Daily | Weekly | Monthly | Daily | Weekly | Monthly |
| 20 th | 27 | 130 | 520 | 25 | 120 | 500 | 24 | 110 | 440 | 22 | 100 | 363 |
| 25 th | 30 | 137 | 585 | 27 | 125 | 507 | 25 | 120 | 481 | 24 | 100 | 400 |
| 30 th | 30 | 150 | 600 | 30 | 130 | 550 | 25 | 120 | 500 | 24 | 108 | 450 |
| 35 th | 30 | 150 | 600 | 30 | 140 | 594 | 27 | 125 | 500 | 25 | 120 | 481 |
| 40 th | 31 | 150 | 600 | 30 | 150 | 600 | 30 | 125 | 521 | 25 | 120 | 500 |
| 45 th | 35 | 150 | 640 | 32 | 150 | 600 | 30 | 135 | 541 | 25 | 125 | 500 |
| 50 th | 36 | 162 | 675 | 35 | 150 | 600 | 30 | 150 | 600 | 28 | 125 | 520 |
| 55 th | 40 | 175 | 700 | 36 | 150 | 642 | 35 | 150 | 600 | 30 | 130 | 540 |
| 60 th | 40 | 180 | 720 | 40 | 161 | 700 | 35 | 150 | 600 | 30 | 140 | 590 |
| 65 th | 40 | 188 | 775 | 40 | 175 | 700 | 40 | 160 | 640 | 35 | 150 | 600 |
| 70 th | 47 | 200 | 800 | 45 | 180 | 750 | 40 | 175 | 700 | 35 | 150 | 600 |
| 75 th | 50 | 200 | 800 | 50 | 196 | 800 | 45 | 180 | 720 | 40 | 162 | 650 |
| 80 th | 55 | 220 | 875 | 50 | 200 | 800 | 50 | 195 | 780 | 40 | 175 | 700 |
| 85 th | 60 | 250 | 1000 | 55 | 212 | 900 | 50 | 200 | 800 | 50 | 200 | 760 |
| 90 th | 65 | 250 | 1000 | 60 | 250 | 1000 | 60 | 225 | 900 | 50 | 200 | 800 |
| 95 th | 80 | 300 | 1200 | 75 | 275 | 1200 | 65 | 250 | 1000 | 62 | 264 | 1000 |

Summer youth camp providers' market rates

Table 8 shows summer youth camp providers' 75th percentile full-time and part-time monthly rates for school-age children. The full-time monthly rate was \$2,076, and the part-time monthly rate was \$1,500.

Table 8. Camp providers' market rates (\$) at five percentile intervals for school-age children, by child age group and rate mode

| | Full-Time | | | Part-Time | | |
|------------------|-----------|--------|-------------|-----------|--------|-------------|
| | Daily | Weekly | Monthly | Daily | Weekly | Monthly |
| 20 th | 49 | 245 | 800 | 28 | 174 | 275 |
| 25 th | 55 | 300 | 960 | 30 | 185 | 320 |
| 30 th | 62 | 300 | 1060 | 30 | 200 | 355 |
| 35 th | 72 | 320 | 1167 | 30 | 220 | 560 |
| 40 th | 72 | 330 | 1296 | 30 | 225 | 575 |
| 45 th | 72 | 360 | 1438 | 30 | 250 | 700 |
| 50 th | 72 | 360 | 1440 | 30 | 255 | 725 |
| 55 th | 100 | 365 | 1600 | 33 | 275 | 792 |
| 60 th | 100 | 470 | 1710 | 40 | 300 | 850 |
| 65 th | 100 | 495 | 1880 | 50 | 310 | 900 |
| 70 th | 105 | 500 | 1880 | 50 | 330 | 900 |
| 75 th | 105 | 525 | 2076 | 50 | 375 | 1500 |
| 80 th | 105 | 685 | 2300 | 57 | 445 | 1500 |
| 85 th | 137 | 700 | 2504 | 60 | 445 | 1780 |

| | | | | | | |
|------------------|-----|-----|------|----|-----|------|
| 90 th | 137 | 900 | 3500 | 80 | 450 | 2000 |
| 95 th | 200 | 950 | 4000 | 80 | 500 | 2000 |

Market rates for children with special needs

Table 9 represents center providers' 75th percentile full-time rates for children with special needs. The monthly rates were \$1,787 for infants, \$1,639 for toddlers, \$1,475 for preschoolers, and \$1,200 for school-age children. Each of these rates was, in general, slightly higher than the full-time rates for children without special needs except for school-age children (the regular full-time rates were \$1,750 for infants, \$1,625 for toddlers, and \$1,462 for preschoolers).

Table 9. Center providers' 75th percentile full-time rates (\$) at five percentile intervals, for children with special needs

| | Infant | | | Toddler | | | Preschooler | | | School-Age | | |
|------------------|--------|--------|-------------|---------|--------|-------------|-------------|--------|-------------|------------|--------|-------------|
| | Daily | Weekly | Monthly | Daily | Weekly | Monthly | Daily | Weekly | Monthly | Daily | Weekly | Monthly |
| 20 th | 60 | 295 | 1300 | 54 | 259 | 1120 | 47 | 210 | 910 | 19 | 108 | 320 |
| 25 th | 63 | 300 | 1345 | 55 | 275 | 1183 | 49 | 240 | 1000 | 20 | 113 | 385 |
| 30 th | 64 | 313 | 1365 | 60 | 295 | 1245 | 53 | 250 | 1022 | 22 | 118 | 410 |
| 35 th | 66 | 320 | 1375 | 63 | 305 | 1278 | 55 | 274 | 1099 | 23 | 125 | 420 |
| 40 th | 69 | 330 | 1431 | 67 | 315 | 1351 | 59 | 280 | 1183 | 25 | 145 | 460 |
| 45 th | 72 | 342 | 1500 | 69 | 323 | 1375 | 60 | 290 | 1200 | 27 | 154 | 500 |
| 50 th | 75 | 347 | 1520 | 70 | 336 | 1440 | 65 | 300 | 1240 | 30 | 175 | 590 |
| 55 th | 77 | 354 | 1575 | 73 | 344 | 1485 | 67 | 301 | 1299 | 35 | 200 | 660 |
| 60 th | 80 | 375 | 1600 | 74 | 350 | 1520 | 68 | 313 | 1378 | 39 | 230 | 760 |
| 65 th | 82 | 380 | 1660 | 76 | 366 | 1570 | 70 | 325 | 1402 | 42 | 265 | 940 |
| 70 th | 84 | 395 | 1717 | 80 | 368 | 1586 | 75 | 340 | 1472 | 54 | 275 | 1100 |
| 75 th | 87 | 408 | 1798 | 82 | 379 | 1639 | 75 | 345 | 1475 | 60 | 300 | 1200 |
| 80 th | 90 | 415 | 1888 | 84 | 390 | 1680 | 75 | 358 | 1549 | 65 | 320 | 1300 |
| 85 th | 95 | 436 | 1923 | 90 | 400 | 1700 | 80 | 375 | 1595 | 65 | 324 | 1400 |
| 90 th | 96 | 449 | 2000 | 98 | 412 | 1865 | 90 | 400 | 1647 | 75 | 345 | 1407 |
| 95 th | 120 | 475 | 2285 | 120 | 450 | 2000 | 100 | 445 | 1780 | 80 | 380 | 1650 |

Table 9 represents center providers' 75th percentile part-time rates for children with special needs by child age group and price mode. The part-time monthly rates were \$1,152 for infants and toddlers, \$1,000 for preschoolers, and \$715 for school-age children. Interestingly, each of these rates was slightly lower than the full-time rates for children without special needs.

Table 10. Center providers' 75th percentile part-time rates (\$) at five percentile intervals, for children with special needs

| | Infant | | | Toddler | | | Preschooler | | | School-Age | | |
|------------------|--------|--------|-------------|---------|--------|-------------|-------------|--------|-------------|------------|--------|------------|
| | Daily | Weekly | Monthly | Daily | Weekly | Monthly | Daily | Weekly | Monthly | Daily | Weekly | Monthly |
| 20 th | 42 | 195 | 845 | 37 | 181 | 770 | 33 | 150 | 560 | 12 | 50 | 230 |
| 25 th | 42 | 208 | 877 | 39 | 183 | 793 | 34 | 150 | 613 | 15 | 65 | 238 |
| 30 th | 44 | 210 | 899 | 40 | 195 | 800 | 35 | 168 | 640 | 18 | 79 | 250 |
| 35 th | 46 | 225 | 900 | 42 | 198 | 819 | 36 | 170 | 700 | 18 | 100 | 260 |
| 40 th | 48 | 230 | 956 | 43 | 212 | 844 | 37 | 179 | 733 | 20 | 122 | 330 |
| 45 th | 48 | 234 | 962 | 44 | 215 | 850 | 38 | 185 | 738 | 20 | 135 | 400 |
| 50 th | 48 | 239 | 1000 | 48 | 220 | 860 | 40 | 192 | 757 | 24 | 150 | 498 |
| 55 th | 50 | 254 | 1014 | 51 | 245 | 918 | 46 | 215 | 800 | 27 | 150 | 550 |
| 60 th | 55 | 261 | 1032 | 55 | 250 | 925 | 50 | 229 | 831 | 30 | 162 | 578 |
| 65 th | 55 | 275 | 1100 | 60 | 272 | 1076 | 50 | 245 | 860 | 32 | 162 | 650 |
| 70 th | 60 | 284 | 1100 | 60 | 275 | 1100 | 50 | 250 | 980 | 32 | 170 | 701 |
| 75 th | 67 | 300 | 1152 | 65 | 295 | 1152 | 55 | 265 | 1000 | 33 | 180 | 715 |
| 80 th | 68 | 312 | 1300 | 67 | 300 | 1246 | 60 | 275 | 1067 | 37 | 200 | 779 |
| 85 th | 70 | 325 | 1400 | 70 | 320 | 1365 | 60 | 281 | 1131 | 50 | 225 | 866 |
| 90 th | 75 | 348 | 1537 | 75 | 335 | 1500 | 65 | 304 | 1300 | 50 | 250 | 1082 |
| 95 th | 80 | 365 | 1945 | 80 | 371 | 1606 | 75 | 337 | 1460 | 65 | 289 | 1300 |

Table 11 represents family providers' 75th percentile full-time child care market rates for children with special needs by child age group and price mode. The monthly rates were \$1,500 for infants, \$1,400 for toddlers and preschoolers, and \$1,300 for school-age children. These rates were considerably higher than the rates for children without special needs.

Table 11. Family providers' 75th percentile full-time rates (\$) at five percentile intervals, for children with special needs

| | Infant | | | Toddler | | | Preschooler | | | School-Age | | |
|------------------------|-----------|------------|-------------|-----------|------------|-------------|-------------|------------|-------------|------------|------------|-------------|
| | Daily | Weekly | Monthly | Daily | Weekly | Monthly | Daily | Weekly | Monthly | Daily | Weekly | Monthly |
| 20 th | 50 | 250 | 1000 | 50 | 240 | 975 | 45 | 200 | 880 | 43 | 190 | 740 |
| 25 th | 52 | 260 | 1080 | 50 | 250 | 1000 | 50 | 225 | 940 | 50 | 200 | 800 |
| 30 th | 55 | 275 | 1120 | 55 | 275 | 1100 | 50 | 250 | 1000 | 50 | 239 | 950 |
| 35 th | 60 | 285 | 1200 | 56 | 285 | 1200 | 50 | 250 | 1000 | 50 | 250 | 1000 |
| 40 th | 60 | 300 | 1200 | 60 | 300 | 1200 | 54 | 250 | 1083 | 50 | 250 | 1000 |
| 45 th | 60 | 300 | 1228 | 60 | 300 | 1212 | 55 | 274 | 1140 | 50 | 250 | 1000 |
| 50 th | 64 | 320 | 1300 | 62 | 308 | 1300 | 58 | 300 | 1200 | 55 | 250 | 1120 |
| 55 th | 65 | 326 | 1375 | 64 | 325 | 1334 | 60 | 300 | 1200 | 55 | 270 | 1188 |
| 60 th | 70 | 350 | 1400 | 68 | 350 | 1400 | 60 | 300 | 1230 | 60 | 297 | 1200 |
| 65 th | 70 | 350 | 1400 | 70 | 350 | 1400 | 60 | 325 | 1300 | 60 | 300 | 1200 |
| 70 th | 75 | 350 | 1400 | 70 | 350 | 1400 | 65 | 350 | 1400 | 63 | 300 | 1220 |
| 75th | 75 | 375 | 1500 | 75 | 350 | 1400 | 70 | 350 | 1400 | 65 | 325 | 1300 |
| 80 th | 80 | 400 | 1600 | 76 | 375 | 1500 | 74 | 360 | 1500 | 70 | 350 | 1380 |
| 85 th | 80 | 400 | 1600 | 80 | 400 | 1600 | 75 | 375 | 1500 | 75 | 360 | 1400 |
| 90 th | 90 | 437 | 1700 | 80 | 400 | 1600 | 80 | 400 | 1600 | 80 | 400 | 1517 |

| | | | | | | | | | | | | |
|------------------|-----|-----|------|-----|-----|------|----|-----|------|----|-----|------|
| 95 th | 120 | 500 | 1892 | 100 | 450 | 1800 | 80 | 450 | 1613 | 80 | 400 | 1600 |
|------------------|-----|-----|------|-----|-----|------|----|-----|------|----|-----|------|

Table 12 represents family providers' 75th percentile part-time rates for children with special needs. The monthly rates were \$1,000 for infants, \$983 for toddlers, \$800 for preschoolers, and \$800 for school-age children. These rates were also considerably higher than the part-time rates for children without special needs.

Table 12. Family providers' 75th percentile part-time rates (\$) at five percentile intervals, for children with special needs

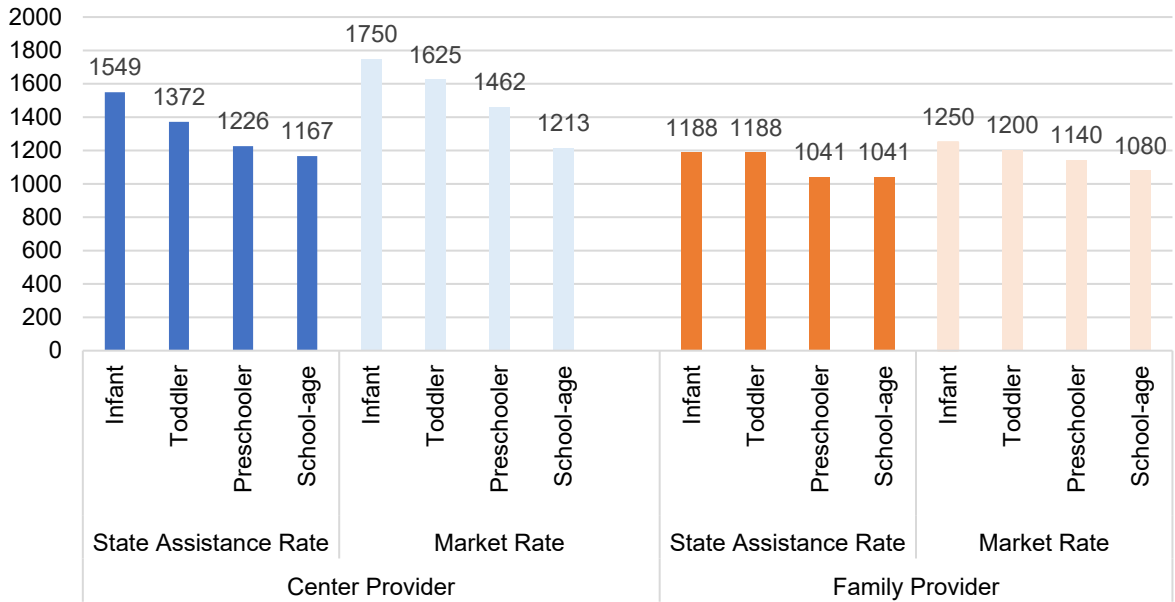
| | Infant | | | Toddler | | | Preschooler | | | School-Age | | |
|------------------------|-----------|------------|-------------|-----------|------------|------------|-------------|------------|------------|------------|------------|------------|
| | Daily | Weekly | Monthly | Daily | Weekly | Monthly | Daily | Weekly | Monthly | Daily | Weekly | Monthly |
| 20 th | 31 | 150 | 600 | 30 | 143 | 600 | 29 | 135 | 585 | 27 | 130 | 500 |
| 25 th | 35 | 154 | 650 | 32 | 150 | 641 | 30 | 145 | 600 | 30 | 137 | 540 |
| 30 th | 35 | 162 | 667 | 35 | 154 | 667 | 30 | 150 | 600 | 30 | 145 | 590 |
| 35 th | 40 | 175 | 700 | 35 | 162 | 700 | 30 | 150 | 600 | 30 | 150 | 594 |
| 40 th | 40 | 175 | 700 | 37 | 175 | 700 | 35 | 160 | 640 | 30 | 150 | 600 |
| 45 th | 40 | 180 | 720 | 40 | 175 | 720 | 35 | 165 | 652 | 35 | 150 | 600 |
| 50 th | 42 | 200 | 758 | 40 | 180 | 750 | 40 | 175 | 700 | 40 | 160 | 627 |
| 55 th | 45 | 200 | 800 | 45 | 200 | 800 | 40 | 180 | 738 | 40 | 175 | 652 |
| 60 th | 50 | 200 | 800 | 46 | 200 | 800 | 43 | 200 | 758 | 40 | 185 | 700 |
| 65 th | 50 | 225 | 812 | 50 | 225 | 800 | 45 | 200 | 800 | 45 | 200 | 758 |
| 70 th | 53 | 250 | 900 | 50 | 250 | 900 | 50 | 200 | 800 | 50 | 200 | 800 |
| 75th | 60 | 250 | 1000 | 55 | 250 | 983 | 50 | 245 | 800 | 50 | 200 | 800 |
| 80 th | 65 | 300 | 1000 | 60 | 280 | 1000 | 60 | 250 | 900 | 53 | 230 | 800 |
| 85 th | 70 | 300 | 1200 | 70 | 300 | 1152 | 60 | 300 | 1000 | 60 | 250 | 900 |
| 90 th | 80 | 350 | 1350 | 80 | 350 | 1300 | 70 | 300 | 1128 | 65 | 300 | 1080 |
| 95 th | 110 | 400 | 1410 | 90 | 450 | 1400 | 90 | 400 | 1250 | 80 | 400 | 1200 |

IV. State Assistance Rates Compared to Market Rates

Comparison using full-time monthly rates

Chart 3 compares the 2023 state assistance rates – including the \$300 differential payments - with the 75th percentile full-time monthly market rates by provider type and child age group. It shows the assistance rates are consistently below the 75th percentile market rates for all age groups.

Chart 3. State assistance rates (\$) and the 75th percentile full-time monthly rates (\$), by provider type and age group



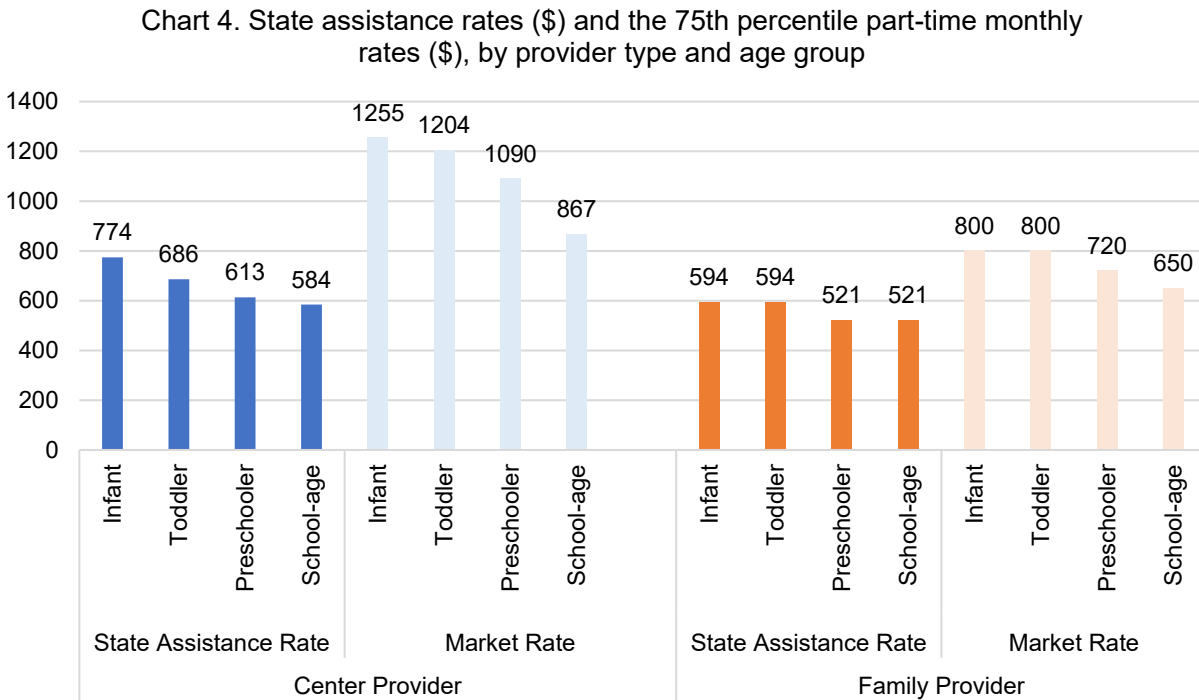
The following **Table 13** summarizes the percentile placements of state assistance rates on the market rate distribution using full-time monthly rates. For center providers, the state assistance rate of \$1,549 for infants was at the 50th percentile of the market rate for infants. For family providers, the state assistance rate of \$1,188 was at the 55th percentile of the market rate for infants. The state assistance rates for school-age children had the highest percentile placement on the distribution of the market rates – 68th percentile for center providers and 70th percentile for family providers.

Table 13. The 2023 state assistance rates’ percentile placement on the market rate distributions, by provider type and child age group: Using full-time monthly rates

| | Center Provider | | Family Provider | |
|-------------|-----------------|----------------------|-----------------|----------------------|
| | Assistance rate | Place on market rate | Assistance rate | Place on market rate |
| Infant | \$1549 | 50th | \$1188 | 55th |
| Toddler | \$1372 | 45th | \$1188 | 65th |
| Preschooler | \$1226 | 46th | \$1041 | 65th |
| School-age | \$1167 | 68th | \$1041 | 70th |

Comparison using part-time monthly rates

Chart 4 provides the same comparison as above but for part-time care. It shows that even with the \$300 differential payments, the state assistance rates were consistently below the 75th percentile part-time market rates for all age groups.



V. Market Rate Variation by County

Center providers' rate variation

The analyses showed that the 75th percentile child care market rates varied substantially by county. Tables A-5 and A-6 in the Appendix provide center providers' 75th percentile full-time and part-time rates by county for all child age groups and rate modes.

Using center providers' full-time monthly rates for toddlers, Chart 5 below shows how the rates varied by county. Cumberland, Atlantic, and Warren Counties had the lowest monthly rates for toddlers (\$1,028, \$1,257, and \$1,275 respectively), and Somerset, Union, and Hudson Counties had the highest rates (\$1,800, \$1,795, and \$1,790 respectively).

Chart 5. Center providers' 75th percentile monthly full-time rates (\$) for toddlers by county

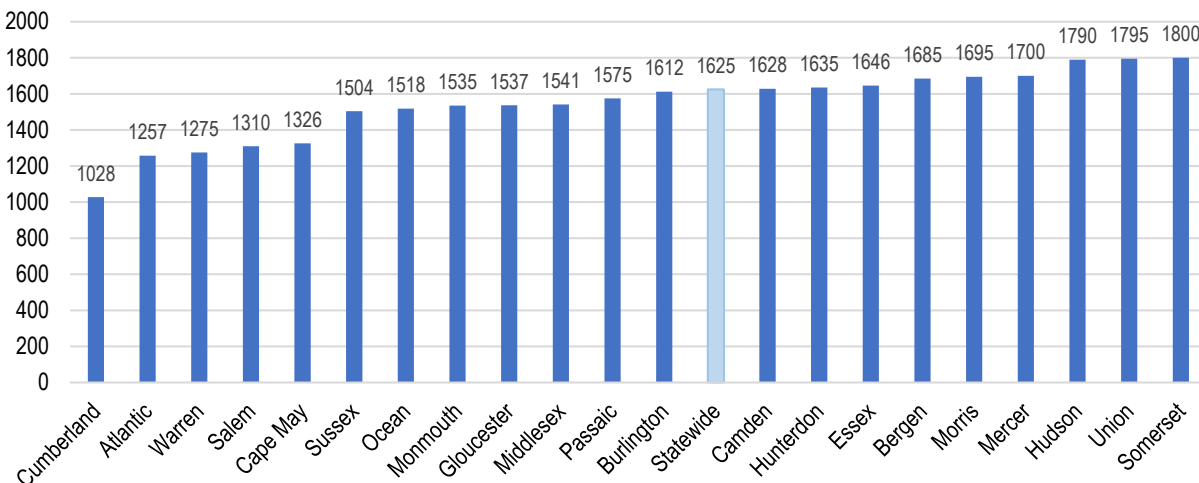
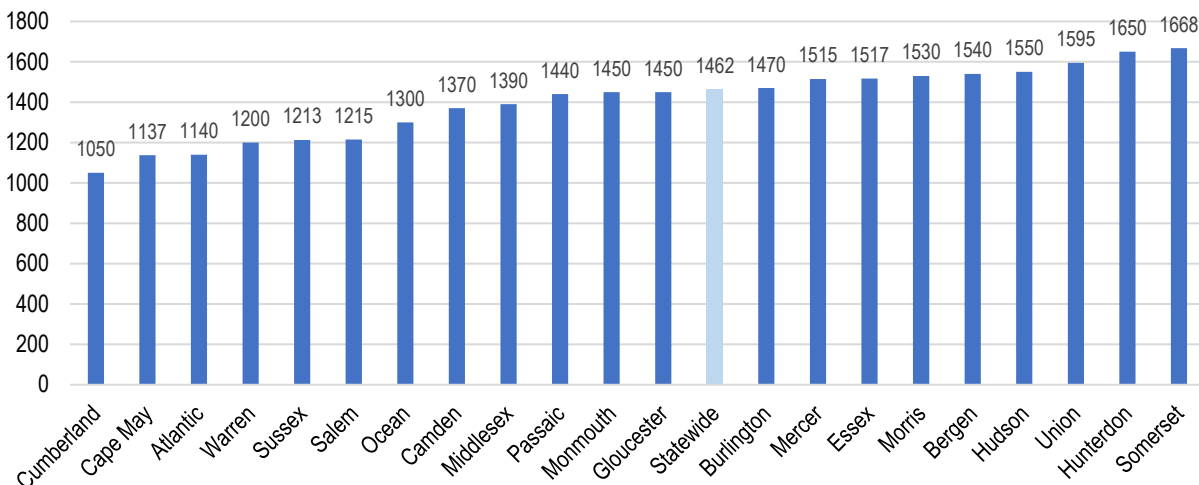


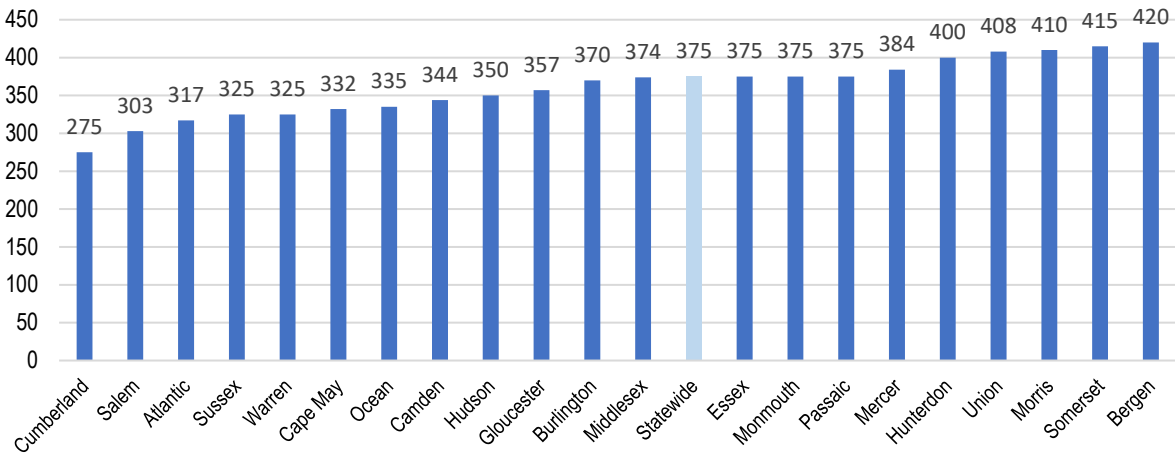
Chart 6 shows the county-by-county variations in center providers' market rates for preschoolers. Again, Cumberland, Cape May, and Atlantic Counties had the lowest monthly rates for preschoolers. On the other hand, Somerset, Hunterdon, and Union Counties were the three Counties with the highest rates. Cumberland County's rate for preschoolers was only about 63% of the equivalent rate in Somerset County (\$1,668 vs. \$1,050).

Chart 6. Center providers' 75th percentile monthly full-time rates (\$) for preschoolers by county



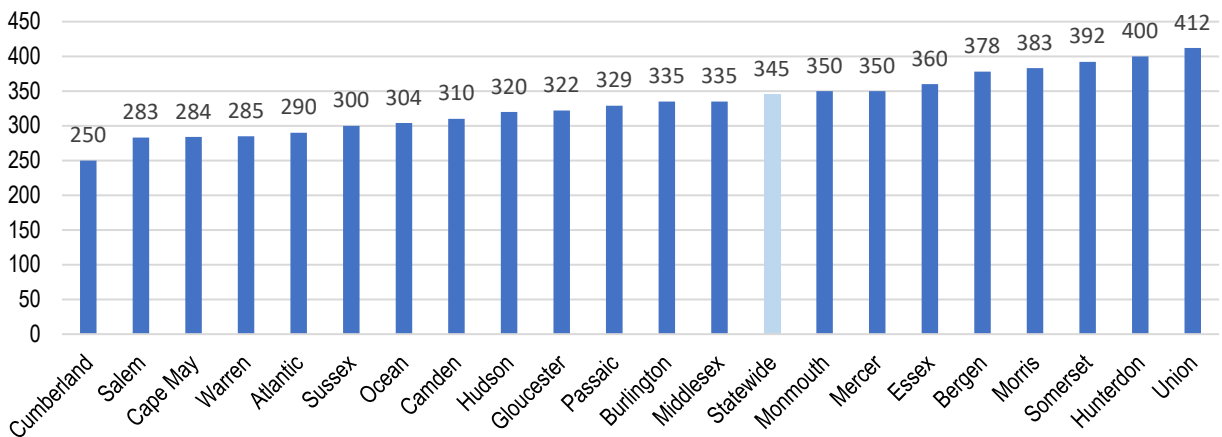
County-by-county rate variations were also examined using *weekly* full-time rates for toddlers and preschoolers. Chart 7 below demonstrated a similar pattern of rate differences for toddlers - the lowest weekly rate of \$275 in Cumberland County was around 65% of the highest rate of \$420 in Bergen County.

Chart 7. Center providers' 75th percentile weekly full-time rates (\$) for toddlers by county



Using weekly full-time rates for preschoolers, Chart 8 shows again that Cumberland and Salem Counties had the lowest rates of \$250 and \$283, and Union and Hunterdon Counties had the highest rates of \$412 and \$400.

Chart 8. Center providers' 75th percentile weekly full-time rates (\$) for preschoolers by county

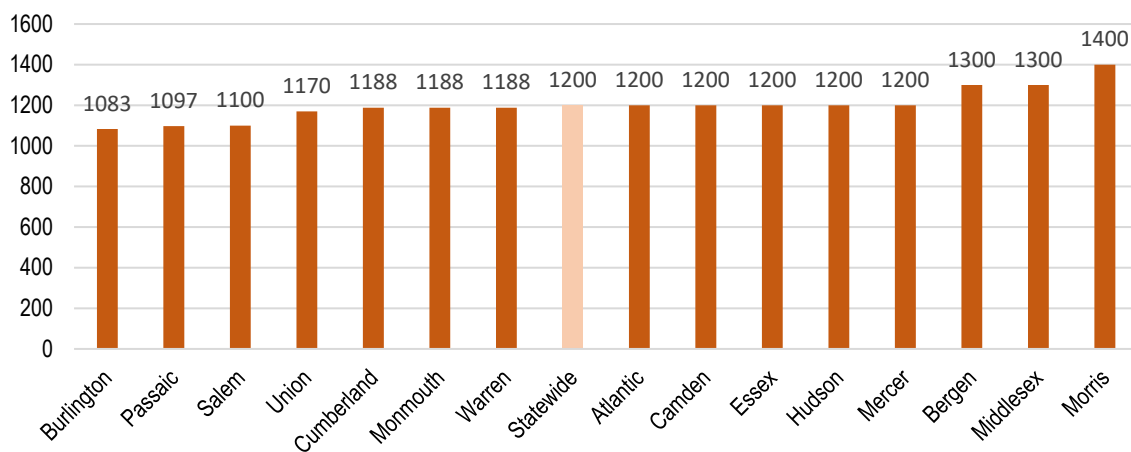


Family providers' rate variation

Family providers' market rates also varied by county, but the rate variation was smaller than that observed in center providers' rates. As shown in Chart 9, for example, many counties' 75th percentile *monthly rates* for toddlers were approximately \$1,200.

Please note that six counties - Cape May, Gloucester, Hunterdon, Ocean, Somerset, and Sussex - were not included in the analysis due to the small number of family providers who participated in the MRS and/or provided the necessary rate information for this analysis.

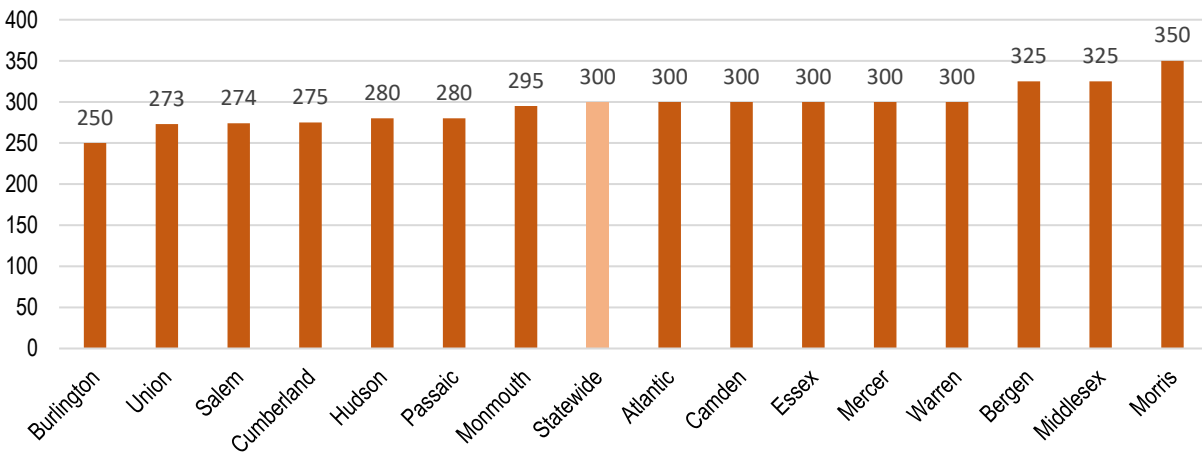
Chart 9. Family providers' 75th percentile monthly full-time rates (\$) for toddlers by county



Tables A-7 and A-8 in the Appendix provide family providers' 75th percentile full-time and part-time rates by county for all child age groups and rate modes.

Chart 10 below shows how family providers' *weekly rates* for toddlers varied by county using the 75th percentile weekly full-time rates. Burlington County's rate of \$250 was the lowest, at around 71% of the highest rate of \$350 in Morris County. The weekly rates were set at around \$300 in seven out of 15 counties.

Chart 10. Family providers' 75th percentile weekly full-time rates (\$) for toddlers by county



VI. Market Rate Variation by Rate Cluster

To create rate clusters by geographic locations, the following analyses were taken as suggested by the National Center on Subsidy Innovation and Accountability ([Grobe et al. 2008](#); [Grobe & Weber, 2012](#)). First, the 75th percentile rates were obtained by zip code, child age group, and price mode (which means, a total of twelve rates by zip code were created). Second, the zip codes were ranked for each of the twelve 75th percentile rates. Then, ten groups of equal (weighted) frequencies of the rates were created for each of the twelve rates, and then a ranking score was assigned to each zip code. Third, the mean ranking score of all twelve rates was obtained for each zip code by dividing the sum of all rank scores by the number of reported rate modes. Fourth, four groups of equal frequencies were created based on the mean ranking scores of zip codes. These four groups become rate clusters for market rates, 1 being the lowest (the least expensive areas) and 4 being the highest (the most expensive areas) rate cluster.

Below Tables 15 through 18 provide the 50th and 75th percentile child care market rates by rate cluster for center providers and family providers.

Center providers' rate variation

Table 15 shows how much the full-time monthly rate varied by rate cluster. Across all child age groups and rate modes, the 50th and 75th percentile rates consistently increase from Cluster 1 (least expensive areas) through Cluster 4 (most expensive areas).

For example, center providers' 75th percentile full-time monthly rates for toddlers ranged from \$1,260 in Cluster 1, \$1,415 in Cluster 2, \$1,600 in Cluster 3, to \$1,800 in Cluster 4.

This comparison shows that the full-time rate for toddlers in the most expensive areas was \$540 higher (nearly 43% higher) than the rate in the least expensive areas.

Table 15. Center providers' full-time rates (\$) by rate cluster

| Cluster | | Infant | | | Toddler | | | Preschooler | | | School-Age | | |
|---------|------------------|--------|--------|---------|---------|--------|---------|-------------|--------|---------|------------|--------|---------|
| | | Daily | Weekly | Monthly | Daily | Weekly | Monthly | Daily | Weekly | Monthly | Daily | Weekly | Monthly |
| 1 | 50 th | 60 | 300 | 1250 | 57 | 275 | 1147 | 50 | 250 | 1000 | 36 | 180 | 566 |
| | 75 th | 69 | 330 | 1375 | 61 | 300 | 1260 | 57 | 280 | 1160 | 52 | 240 | 920 |
| 2 | 50 th | 70 | 345 | 1408 | 63 | 310 | 1312 | 57 | 280 | 1170 | 50 | 230 | 840 |
| | 75 th | 75 | 369 | 1550 | 70 | 335 | 1415 | 60 | 300 | 1280 | 57 | 275 | 1167 |
| 3 | 50 th | 77 | 370 | 1551 | 72 | 345 | 1465 | 65 | 306 | 1300 | 55 | 250 | 1000 |
| | 75 th | 85 | 400 | 1723 | 80 | 375 | 1600 | 74 | 345 | 1445 | 70 | 300 | 1300 |
| 4 | 50 th | 88 | 412 | 1755 | 83 | 379 | 1612 | 80 | 350 | 1477 | 76 | 330 | 1285 |
| | 75 th | 103 | 449 | 1920 | 100 | 424 | 1800 | 93 | 403 | 1700 | 97 | 390 | 1630 |

Table 16 suggests a similar story about how center providers' part-time rates varied by rate cluster. Using monthly rates for toddlers again, the rate ranged from \$708 in Cluster 1 to \$1440 in Cluster 4. The 75th percentile part-time monthly rate for toddlers in the most expensive areas was more than double the rate in the least expensive areas.

Table 16. Center providers' part-time rates (\$) by rate cluster

| Cluster | | Infant | | | Toddler | | | Preschooler | | | School-Age | | |
|---------|------------------|--------|--------|---------|---------|--------|---------|-------------|--------|---------|------------|--------|---------|
| | | Daily | Weekly | Monthly | Daily | Weekly | Monthly | Daily | Weekly | Monthly | Daily | Weekly | Monthly |
| 1 | 50 th | 36 | 179 | 760 | 32 | 158 | 648 | 30 | 148 | 592 | 27 | 135 | 500 |
| | 75 th | 39 | 195 | 813 | 37 | 175 | 708 | 33 | 160 | 650 | 30 | 150 | 584 |
| 2 | 50 th | 46 | 225 | 952 | 43 | 210 | 865 | 38 | 180 | 720 | 28 | 145 | 560 |
| | 75 th | 53 | 260 | 1040 | 50 | 245 | 997 | 47 | 220 | 880 | 35 | 175 | 682 |
| 3 | 50 th | 56 | 275 | 1132 | 53 | 259 | 1075 | 48 | 225 | 900 | 36 | 160 | 620 |
| | 75 th | 65 | 300 | 1250 | 61 | 287 | 1175 | 56 | 256 | 1055 | 50 | 229 | 900 |
| 4 | 50 th | 63 | 300 | 1290 | 60 | 291 | 1225 | 54 | 265 | 1122 | 52 | 245 | 1000 |
| | 75 th | 75 | 328 | 1467 | 72 | 327 | 1440 | 68 | 300 | 1300 | 65 | 285 | 1200 |

Family providers' rate variation

Table 17 presents how full-time rates varied by rate cluster among family providers. As observed among center providers, the 50th and 75th percentile rates in a more expensive area were consistently higher than the rates in a less expensive area across all child age groups and rate modes. However, the amount of variation appears to be smaller among family providers, compared to center providers. Using monthly rates for toddlers again, the 75th percentile rates ranged from \$1,100 in Cluster 1 to \$1,400 in Cluster 2. The most

expensive area's rate was \$300 higher (about 27% higher) than the least expensive area's rate for toddlers.

Table 17. Family providers' full-time rates (\$) by rate cluster

| Cluster | | Infant | | | Toddler | | | Preschooler | | | School-Age | | |
|---------|------------------|--------|--------|---------|---------|--------|---------|-------------|--------|---------|------------|--------|---------|
| | | Daily | Weekly | Monthly | Daily | Weekly | Monthly | Daily | Weekly | Monthly | Daily | Weekly | Monthly |
| 1 | 50 th | 50 | 250 | 1000 | 50 | 240 | 1000 | 45 | 220 | 900 | 40 | 200 | 800 |
| | 75 th | 56 | 300 | 1188 | 55 | 270 | 1100 | 50 | 250 | 1000 | 48 | 230 | 962 |
| 2 | 50 th | 55 | 274 | 1080 | 53 | 250 | 1000 | 50 | 240 | 975 | 45 | 200 | 900 |
| | 75 th | 60 | 300 | 1200 | 60 | 300 | 1200 | 55 | 265 | 1080 | 50 | 250 | 1060 |
| 3 | 50 th | 55 | 280 | 1188 | 55 | 274 | 1148 | 50 | 250 | 1000 | 48 | 225 | 1000 |
| | 75 th | 65 | 325 | 1300 | 60 | 300 | 1201 | 60 | 300 | 1200 | 55 | 274 | 1105 |
| 4 | 50 th | 60 | 300 | 1300 | 60 | 300 | 1200 | 60 | 260 | 1041 | 50 | 240 | 1000 |
| | 75 th | 70 | 350 | 1500 | 70 | 350 | 1400 | 70 | 325 | 1300 | 70 | 300 | 1300 |

Table 18 presents part-time rate variations by rate cluster among family providers. Using monthly rates for toddlers again as an example, the 75th percentile rates ranged from \$594 in Cluster 1 to \$840 in Cluster 2. The most expensive area's rate was \$246 higher (about 41% higher) than the least expensive area's rate for toddlers.

Table 18. Family providers' part-time rates (\$) by rate cluster

| Cluster | | Infant | | | Toddler | | | Preschooler | | | School-Age | | |
|---------|------------------|--------|--------|---------|---------|--------|---------|-------------|--------|---------|------------|--------|---------|
| | | Daily | Weekly | Monthly | Daily | Weekly | Monthly | Daily | Weekly | Monthly | Daily | Weekly | Monthly |
| 1 | 50 th | 27 | 137 | 549 | 27 | 127 | 520 | 24 | 120 | 500 | 24 | 119 | 480 |
| | 75 th | 30 | 150 | 600 | 28 | 140 | 594 | 25 | 125 | 500 | 25 | 125 | 500 |
| 2 | 50 th | 30 | 150 | 600 | 30 | 150 | 600 | 30 | 134 | 550 | 25 | 125 | 525 |
| | 75 th | 36 | 160 | 700 | 35 | 156 | 650 | 31 | 150 | 600 | 30 | 150 | 600 |
| 3 | 50 th | 32 | 160 | 700 | 30 | 150 | 640 | 29 | 146 | 600 | 27 | 125 | 540 |
| | 75 th | 38 | 190 | 800 | 35 | 175 | 700 | 35 | 170 | 650 | 30 | 150 | 600 |
| 4 | 50 th | 40 | 195 | 800 | 40 | 180 | 780 | 35 | 175 | 750 | 35 | 175 | 700 |
| | 75 th | 45 | 200 | 880 | 40 | 210 | 840 | 40 | 200 | 800 | 40 | 200 | 800 |

VII. Market Rate Variation by Quality Indicator

Variation by accreditation status

As discussed earlier, accreditation status and GNJK star level were used as quality indicators for center providers. Of the 2,437 center providers that responded to the accreditation question, 15.31% (n=373) reported that they were accredited. The MRS for family providers did not include an accreditation status question.

Table 19 shows that accredited center providers' market rates were consistently higher than non-accredited providers' rates for all child age groups and rate modes. For example, accredited providers' 75th percentile full-time monthly rate for toddlers was \$1,795, \$220 higher (about 14% higher) than non-accredited providers' rates of \$1,575.

Table 19. Center providers' full-time rates (\$) by accreditation status (yes/no)

| | Infant | | | Toddler | | | Preschooler | | | School-Age | | |
|------------------|--------|--------|---------|---------|--------|---------|-------------|--------|---------|------------|--------|---------|
| | Daily | Weekly | Monthly | Daily | Weekly | Monthly | Daily | Weekly | Monthly | Daily | Weekly | Monthly |
| Yes | | | | | | | | | | | | |
| 50 th | 80 | 389 | 1700 | 75 | 356 | 1550 | 61 | 310 | 1290 | 54 | 265 | 1167 |
| 75 th | 99 | 430 | 1900 | 96 | 400 | 1795 | 81 | 370 | 1606 | 76 | 312 | 1531 |
| No | | | | | | | | | | | | |
| 50 th | 75 | 350 | 1535 | 68 | 320 | 1380 | 60 | 289 | 1242 | 54 | 230 | 800 |
| 75 th | 85 | 397 | 1722 | 91 | 365 | 1575 | 75 | 335 | 1440 | 70 | 300 | 1200 |

The same story holds for part-time market rates. Table 20 shows that accredited programs' part-time rates were considerably higher than non-accredited programs' rates. For toddlers, accredited providers' 75th percentile part-time monthly rate was \$1,313, \$113 higher (about 9.4% higher) than non-accredited providers' rates of \$1,200.

Table 20. Center providers' part-time rates (\$) by accreditation status (yes/no)

| | Infant | | | Toddler | | | Preschooler | | | School-Age | | |
|------------------|--------|--------|---------|---------|--------|---------|-------------|--------|---------|------------|--------|---------|
| | Daily | Weekly | Monthly | Daily | Weekly | Monthly | Daily | Weekly | Monthly | Daily | Weekly | Monthly |
| Yes | | | | | | | | | | | | |
| 50 th | 62 | 294 | 1178 | 55 | 276 | 1124 | 43 | 235 | 930 | 34 | 150 | 700 |
| 75 th | 81 | 316 | 1365 | 74 | 305 | 1313 | 66 | 275 | 1155 | 55 | 224 | 1017 |
| No | | | | | | | | | | | | |
| 50 th | 50 | 248 | 1014 | 49 | 230 | 968 | 43 | 200 | 825 | 30 | 160 | 584 |
| 75 th | 60 | 293 | 1245 | 60 | 281 | 1200 | 53 | 250 | 1070 | 50 | 216 | 850 |

Variation by Grow NJ Kids Star Level

Grow NJ Kids (GNJK) is the State's quality rating and improvement system designed to raise the quality of child care and early childhood education by providing support and resources to programs through technical assistance, professional development training, and opportunities to the workforce. The highest star level in the GNJK program is 5-star, and the state assistance rates are higher for providers rated 3-star or above.

As Table 21 shows, a total of 811 center providers had a GNJK star level, and a total of 112 family providers had a GNJK level. The GNJK star level breakdowns, both in number and percentage, are summarized below.

Table 21. The number and percentage of GNJK star levels by provider type

| GNJK star level | Center Provider | | Family Provider | |
|-----------------|-----------------|--------|-----------------|--------|
| | N | % | N | % |
| 1 | 461 | 56.84 | 63 | 56.25 |
| 2 | 119 | 14.67 | 7 | 6.25 |
| 3 | 142 | 17.51 | 23 | 20.54 |
| 4 | 87 | 10.73 | 15 | 13.39 |
| 5 | 2 | 0.25 | 4 | 3.57 |
| Total | 811 | 100.00 | 112 | 100.00 |

Interestingly, center providers that had higher GNJK star levels did not necessarily have higher market rates. For example, the 75th percentile full-time monthly toddler rate was lower for 4-star providers (\$1,504) than for 3-star providers (\$1,545), as Table 22 presents.

Table 22. Center providers' full-time rates (\$) by GNJK Star Level (1 through 4)

| GNJK star level | Infant | | | Toddler | | | Preschooler | | | School-Age | | |
|------------------|--------|--------|---------|---------|--------|---------|-------------|--------|---------|------------|--------|---------|
| | Daily | Weekly | Monthly | Daily | Weekly | Monthly | Daily | Weekly | Monthly | Daily | Weekly | Monthly |
| 1 | | | | | | | | | | | | |
| 50 th | 75 | 355 | 1548 | 70 | 319 | 1375 | 65 | 295 | 1242 | 55 | 245 | 1050 |
| 75 th | 90 | 403 | 1700 | 85 | 375 | 1580 | 79 | 340 | 1450 | 75 | 300 | 1240 |
| 2 | | | | | | | | | | | | |
| 50 th | 72 | 345 | 1440 | 69 | 320 | 1304 | 59 | 285 | 1200 | 54 | 226 | 1000 |
| 75 th | 85 | 380 | 1549 | 77 | 344 | 1400 | 72 | 300 | 1320 | 75 | 270 | 1167 |
| 3 | | | | | | | | | | | | |
| 50 th | 76 | 375 | 1549 | 65 | 325 | 1381 | 59 | 290 | 1220 | 54 | 270 | 996 |
| 75 th | 89 | 396 | 1653 | 80 | 370 | 1545 | 70 | 335 | 1295 | 65 | 300 | 1167 |
| 4 | | | | | | | | | | | | |
| 50 th | 72 | 350 | 1538 | 69 | 325 | 1402 | 60 | 298 | 1238 | 42 | 250 | 1050 |
| 75 th | 80 | 391 | 1745 | 72 | 350 | 1504 | 70 | 324 | 1400 | 57 | 283 | 1100 |

Consistent with the full-time rates, center providers' part-time rates did not show a clear pattern by GNJK star level. For example, the 75th percentile part-time monthly toddler rate was lower for 3-star providers (\$1,040) than for 2-star providers (\$1,056), as Table 23 shows.

Table 23. Center providers' part-time rates (\$) by GNJK Star level (1 through 4)

| GNJK star level | Infant | | | Toddler | | | Preschooler | | | School-Age | | |
|------------------|--------|--------|---------|---------|--------|---------|-------------|--------|---------|------------|--------|---------|
| | Daily | Weekly | Monthly | Daily | Weekly | Monthly | Daily | Weekly | Monthly | Daily | Weekly | Monthly |
| 1 | | | | | | | | | | | | |
| 50 th | 50 | 250 | 1014 | 53 | 247 | 1024 | 45 | 215 | 850 | 35 | 150 | 600 |
| 75 th | 65 | 300 | 1238 | 65 | 285 | 1224 | 60 | 265 | 1102 | 53 | 200 | 780 |
| 2 | | | | | | | | | | | | |
| 50 th | 55 | 250 | 1000 | 49 | 220 | 844 | 42 | 190 | 840 | 31 | 150 | 682 |
| 75 th | 62 | 285 | 1160 | 67 | 264 | 1056 | 50 | 240 | 953 | 50 | 210 | 866 |

| | | | | | | | | | | | | |
|------------------|----|-----|------|----|-----|------|----|-----|------|----|-----|-----|
| 3 | | | | | | | | | | | | |
| 50 th | 51 | 239 | 846 | 47 | 210 | 806 | 38 | 190 | 750 | 35 | 160 | 584 |
| 75 th | 64 | 292 | 1100 | 64 | 280 | 1040 | 55 | 255 | 1000 | 50 | 227 | 800 |
| 4 | | | | | | | | | | | | |
| 50 th | 48 | 200 | 990 | 44 | 185 | 983 | 36 | 153 | 700 | 28 | 135 | 565 |
| 75 th | 57 | 279 | 1064 | 55 | 259 | 1050 | 50 | 225 | 930 | 36 | 199 | 774 |

Because family providers did not have sufficient numbers in each GNJK star level, the providers were grouped by GNJK participation status (yes or no), rather than by star level. For family providers, participation in the GNJK program was considered a quality indicator. As Tables 24 and 25, family providers' market rates – either full-time or part-time rates - did not appear to vary by participation in the GNJK program.

Table 24. Family providers' full-time rates (\$) by GNJK participation (yes/no)

| | Infant | | | Toddler | | | Preschooler | | | School-Age | | |
|------------------|--------|--------|---------|---------|--------|---------|-------------|--------|---------|------------|--------|---------|
| | Daily | Weekly | Monthly | Daily | Weekly | Monthly | Daily | Weekly | Monthly | Daily | Weekly | Monthly |
| No | | | | | | | | | | | | |
| 50 th | 55 | 274 | 1100 | 54 | 250 | 1080 | 50 | 240 | 988 | 46 | 210 | 900 |
| 75 th | 60 | 321 | 1239 | 60 | 300 | 1200 | 60 | 280 | 1140 | 55 | 250 | 1082 |
| Yes | | | | | | | | | | | | |
| 50 th | 60 | 300 | 1200 | 60 | 274 | 1100 | 50 | 250 | 1000 | 48 | 200 | 800 |
| 75 th | 70 | 325 | 1300 | 64 | 300 | 1200 | 60 | 300 | 1192 | 60 | 250 | 1027 |

Table 25. Family providers' part-time rates (\$) by GNJK participation (yes/no)

| | Infant | | | Toddler | | | Preschooler | | | School-Age | | |
|------------------|--------|--------|---------|---------|--------|---------|-------------|--------|---------|------------|--------|---------|
| | Daily | Weekly | Monthly | Daily | Weekly | Monthly | Daily | Weekly | Monthly | Daily | Weekly | Monthly |
| No | | | | | | | | | | | | |
| 50 th | 30 | 150 | 600 | 30 | 150 | 600 | 25 | 125 | 540 | 25 | 125 | 521 |
| 75 th | 40 | 179 | 744 | 35 | 175 | 700 | 33 | 150 | 625 | 32 | 150 | 600 |
| Yes | | | | | | | | | | | | |
| 50 th | 34 | 173 | 700 | 30 | 160 | 640 | 28 | 130 | 528 | 27 | 125 | 500 |
| 75 th | 40 | 200 | 800 | 40 | 195 | 800 | 40 | 175 | 700 | 35 | 150 | 600 |

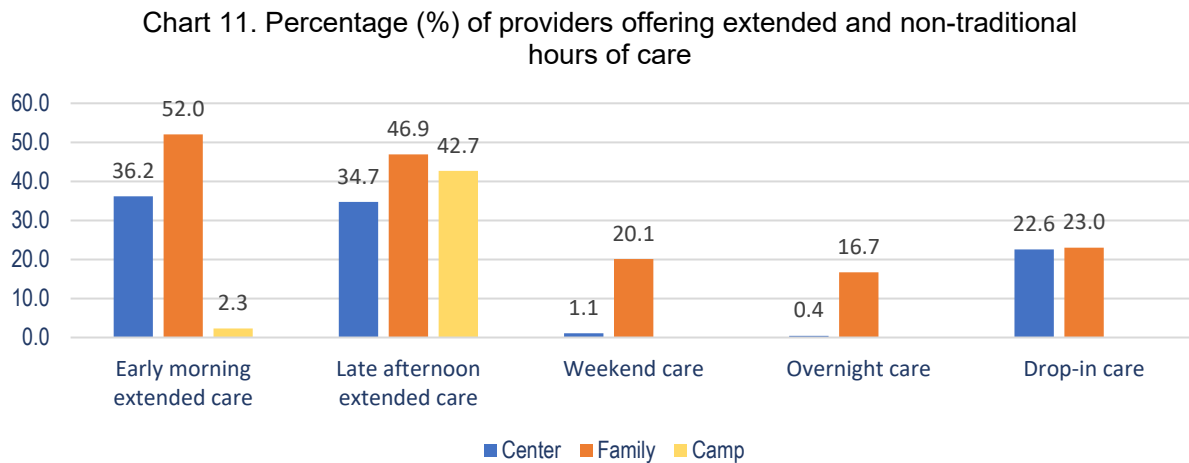
VIII. Extended Care Rates, Discounts, and Special Fees

Providers with extended and non-traditional hours of care

As Chart 11 shows, about 36% of center providers and 52% of family providers reported offering early morning extended care. Additionally, nearly 35% of center providers and 47% of family providers offered late afternoon extended care. Almost 43% of summer youth

camp providers offered later afternoon extended care, but only about 2% of them offered early morning extended care.

The analyses showed that non-traditional hours of care such as weekend, overnight, and drop-in care were available only with family providers. Approximately 20% of family providers said they offered weekend care. Nearly 17% and 23% of them reported offering overnight and drop-in care, respectively.



Extended and non-traditional care rates

Table 26 below presents the 75th percentile rates that providers charged for extended care, by provider type and rate mode. Center providers' weekly rates for extended morning and afternoon care were \$75 and \$106. Family providers' weekly rates were \$290 for both types of extended care.

Table 26. The 75th percentile rates (\$) for extended care

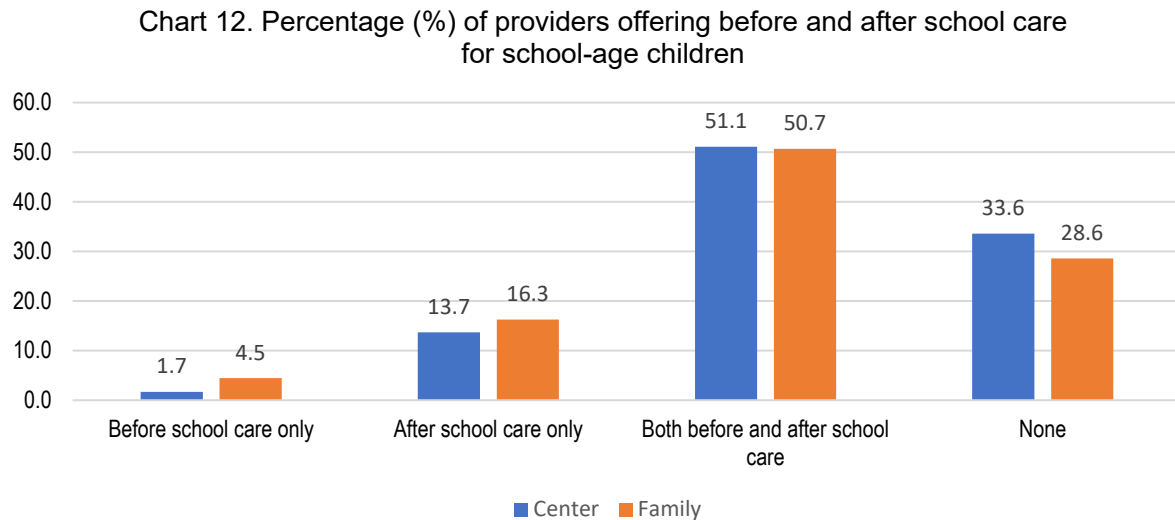
| | Center Provider | Family Provider | Summer Youth Camp |
|-----------------------------|-----------------|-----------------|-------------------|
| Early morning extended care | | | |
| Hourly rate | 15 | 20 | 20 |
| Daily rate | 24 | 60 | -- |
| Weekly rate | 75 | 290 | 50 |
| Monthly rate | 200 | 1000 | 200 |

| Late afternoon extended care | | | |
|------------------------------|-----|------|-----|
| Hourly rate | 16 | 20 | -- |
| Daily rate | 32 | 60 | 25 |
| Weekly rate | 106 | 290 | 100 |
| Monthly rate | 400 | 1000 | 400 |

As for non-traditional hours of care by family providers, the weekly rates were \$300 for weekend care, \$400 for overnight care, and \$350 for drop-in care. The daily rates were \$80 for weekend care, \$90 for overnight care, and \$65 for drop-in care.

Providers offering before- and after-school care for school-age children

Chart 12 shows the share of center and family providers that offered before- and after-school care for school-age children. Slightly more than 50% of the providers offered both before- and after-school care for school-age children.



Before- and after-school care rates

As the Table below shows, center providers' 75th percentile weekly rates for both before- and after-school care were \$175. Family providers' 75th percentile weekly rates were \$200.

Table 27. The 75th percentile rates (\$) for before- and after-school care by provider and rate mode

| | Center Provider | Family Provider |
|------------------------------------|-----------------|-----------------|
| Before-school care only | | |
| Daily rate | 21 | 30 |
| Weekly rate | 100 | 175 |
| Monthly rate | 282 | 600 |
| After-school care only | | |
| Daily rate | 28 | 30 |
| Weekly rate | 132 | 150 |
| Monthly rate | 468 | 600 |
| Both before -and after-school care | | |
| Daily rate | 43 | 50 |
| Weekly rate | 175 | 200 |
| Monthly rate | 650 | 800 |

Other fees and discounts

Table 28 below summarizes fees other than regular tuition rates that providers charge to families. Those fees include registration fees, transportation fees, late pick-up fees, security deposits, and supply fees. More than 80% of providers reported charging around \$100 for registration fees either annually or at the time of new enrollment. About a quarter of center and family providers had families pay about \$250 or \$300 for a security deposit. Late pick-up fees were also applied for more than 50% of the providers. Providers charged a certain fee either per minute or per five to 15 minutes for late pick-ups.

Table 28. Other fees and discounts: The 75th percentile rate (\$) and the most common frequency

| Other Fees | Center Provider | | Family Provider | | Camp Provider | |
|--------------------|-----------------|------------|-----------------|------------|---------------|------------|
| | Rate | Frequency | Rate | Frequency | Rate | Frequency |
| Registration fee | 101 | Annually | 75 | Annually | 100 | Once |
| Transportation fee | 145 | Monthly | 43 | Weekly | 70 | Weekly |
| Late pick-up fee | 1 | Per minute | 1 | Per minute | 1 | Per minute |
| Security deposit | 300 | Once | 250 | Once | -- | -- |
| Supply fee | 50 | Annually | 20 | Annually | -- | -- |
| Discounts | | | | | | |
| Sibling discount | Varies | Monthly | Varies | Weekly | Varies | Weekly |

| | | | | | | |
|-----------------|--------|--------|----|----|--------|--------|
| Other discounts | Varies | Varies | -- | -- | Varies | Varies |
|-----------------|--------|--------|----|----|--------|--------|

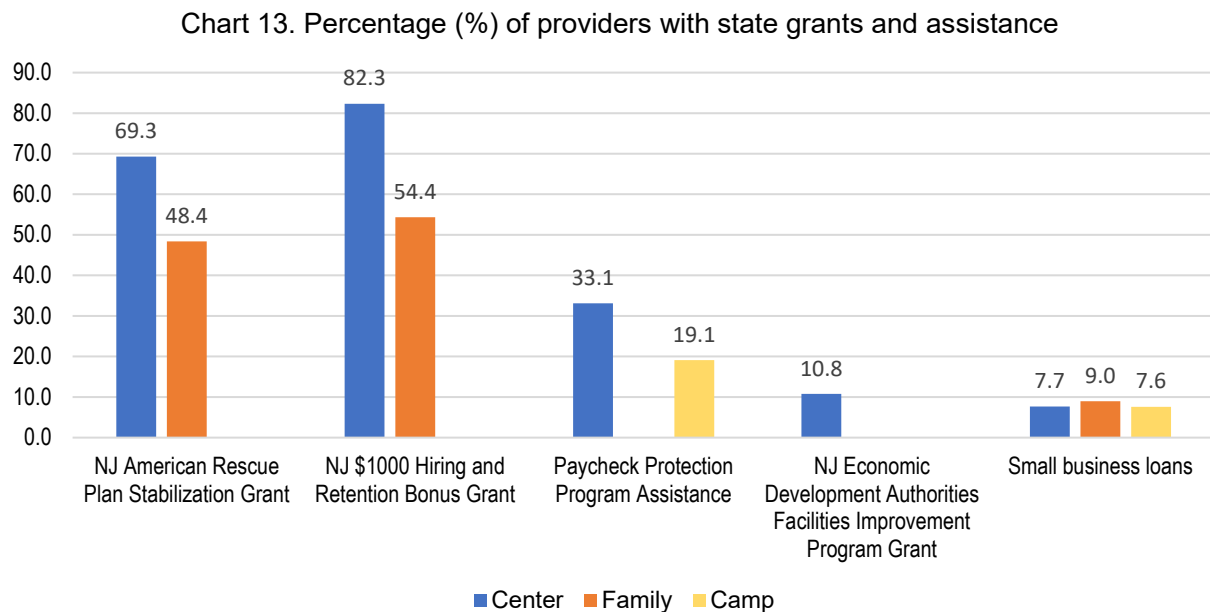
As for discounts, about 64% of center providers and 25% of family providers reported offering a sibling discount either as a certain percentage (5 to 50%) of tuition reduction or a fixed dollar amount (e.g., \$100 to \$500) reduced from their regular tuitions. A monthly 10% reduction appeared to be the most common.

Some providers also reported offering other discounts such as military discounts, new family discounts, referral discounts, early registration discounts, and discounts for signing up for multiple-weeks.

Receipt of state grants and assistance

According to Chart 13 below, more than 82% of center providers and 54% of family providers received the \$1000 NJ Hiring and Retention Bonus Grant from the state government on behalf of their eligible staff. Moreover, 69% of center providers and 48% of family providers received the NJ American Rescue Plan (ARP) Stabilization Grant. Of the center providers that had received the ARP Stabilization Grant, more than 89% reported having exhausted the fund by December 2023.

The Chart also suggests that 19% of summer youth camp providers received the Paycheck Protection Program assistance. Less than 10% of center, family, and camp providers reported receiving small business loans.



Approximately 4.5% of center providers received other grants such as the *Thriving by Three Infant and Toddler Child Care Grant*. Similarly, approximately 4% of family providers received the *Small Quality and Health and Safety* grant. More than 10% of youth camp providers reported receiving the NJCCIS grant and summer camp grant.

About 8% of center providers, 32% of family providers, and 72% of summer youth camp providers reported not receiving any grants and assistance from the state government.

CHILD CARE SUPPLY ANALYSES

I. Estimated Numbers of Children and Child Care Slots

To examine the extent to which families with young children in any part of the state had difficulty accessing child care services in 2023, the number of available child care slots in zip code areas was compared to the number of young children (under age six) within the areas.

First, the number of available child care slots from the following five types of providers – (1) licensed child care centers, (2) registered family providers, (3) Head Start programs, (4) Early Head Start programs, and (5) public pre-K programs – were obtained from the Division of Family Development. Second, all providers’ zip code locations were identified, and the five data files were merged by zip code to combine all available slots within the zip code areas (Note that as the public programs’ maximum slots were not available, enrollment data were used as slot information for Head Start, Early Head Start, and public pre-K programs). Third, the number of young children (under age six) by zip code area of New Jersey was obtained from the 2020 U.S. Census website (<https://data.census.gov/table>). Last, the total number of young children by zip code area was compared with the estimated total number of child care slots within each zip code area. It is important to know that these numbers were very rough estimates of true numbers in part because the slot (enrollment) data were from 2023 but the Census data on the number of children was from 2020. In addition, not all zip code areas of the state were included in the analysis because some areas were unpopulated or did not have young children.

Table 29 below shows that there were an estimated number of 494,295 young children in the state in 2020 and a total of 373,875 child care slots across all child care providers in 2023.

Table 29. Total numbers of children and slots by zip code area

| | N | Number of Zip Code Areas |
|--|----------|---------------------------------|
| Total number of children under age six | 494,295 | 501 |
| Total number of slots | 373,875 | 501 |
| Centers providers’ maximum slots | 298,329 | 477 |
| Family providers’ maximum slots | 5,796 | 232 |
| Public Pre-K enrollment | 56,575 | 182 |

| | | |
|-----------------------------|-------|----|
| Early Head Start enrollment | 4,059 | 16 |
| Head Start enrollment | 9,116 | 33 |

II. Children-to-Slots Ratio

To gauge the level of child care supply in a zip code area, a **children-to-slots ratio** was created by dividing the total number of young children in the area by the total number of child care slots in the area. An area with a high children-to-slots ratio (>5) may be considered to have experienced a supply gap.

As Table 30 shows, the mean children-to-slots ratio was 2.21, indicating that for every 2.21 young children across the 501 zip code areas, there was one child care slot on average. The median children-to-slots ratio of 1.50 suggests that half of the zip code areas in the state had one slot for fewer than 1.5 young children and the other half of the zip code areas had one slot for more than 1.5 young children. Table 30 also shows that the mean ratio varied considerably by county, ranging from as high as 7.23 in Cape May County to as low as 1.28 in Cumberland County.

Table 30. Mean and median children-to-slots ratio by county

| | Number of Zip Code Areas | Mean Ratio | Median Ratio |
|------------------|--------------------------|-------------|--------------|
| Statewide | 501 | 2.21 | 1.50 |
| Cape May | 8 | 7.23 | 2.51 |
| Warren | 8 | 4.90 | 1.77 |
| Sussex | 16 | 3.17 | 2.96 |
| Middlesex | 35 | 2.64 | 1.60 |
| Ocean | 25 | 2.53 | 2.14 |
| Bergen | 63 | 2.48 | 1.59 |
| Burlington | 23 | 2.41 | 1.57 |
| Camden | 32 | 2.37 | 1.69 |
| Hunterdon | 13 | 2.24 | 1.80 |
| Mercer | 20 | 2.24 | 1.15 |
| Gloucester | 17 | 2.16 | 1.61 |
| Essex | 31 | 1.97 | 1.43 |
| Passaic | 27 | 1.92 | 1.57 |
| Monmouth | 42 | 1.85 | 1.42 |
| Atlantic | 22 | 1.80 | 1.28 |
| Salem | 9 | 1.70 | 1.93 |
| Union | 25 | 1.65 | 1.44 |
| Hudson | 16 | 1.52 | 1.21 |
| Somerset | 20 | 1.43 | 1.07 |
| Morris | 39 | 1.38 | 1.16 |
| Cumberland | 10 | 1.28 | 1.10 |

III. Areas with a Potential Supply Gap

As discussed above, a zip code area may be considered to have a low (<3), medium (3-5), or high (>5) children-to-slot ratio.

Table 31 below summarizes the number of zip code areas considered to potentially have some level of child care supply gaps. More than 83% of the zip code areas included in the analysis, and 84% of young children in those areas did *not* appear to experience any potential supply gap. However, about 6.59% of zip code areas (N=33) and 3.75% of young children (N=18,530) in the areas might have experienced some challenges in accessing child care services.

Table 31. Zip code areas with a potential supply gap

| Children-to-Slot Ratio | Number of Zip Code Areas | | Number of Young Children | |
|--------------------------|--------------------------|--------|--------------------------|--------|
| | N | % | N | % |
| Low (< 3) | 416 | 83.03 | 417,082 | 84.38 |
| Medium (between 3 and 5) | 52 | 10.38 | 58,683 | 11.87 |
| High (> 5) | 33 | 6.59 | 18,530 | 3.75 |
| Total | 501 | 100.00 | 494,295 | 100.00 |

Table 32 below ranked the 33 zip code areas with a children-to-slots ratio over five. To better identify those areas, the county and city names were also provided along with the ratios. The city of Rio Grande in Cape May County - the zip code area 08242 - had the highest ratio of 42.

Additionally, the same table identifies nine zip code areas with a children-to-slots ratio over 10. In those areas, it was estimated that, for a total of 4,122 young children, only 316 child care slots were available.

Table 32. Zip code areas with a children-to-slots ratio over 5

| Ranking | County | City | Zip Code | Children-to-Slots Ratio |
|---------|-----------|-----------------|----------|-------------------------|
| 1 | Cape May | Rio Grande | 08242 | 42.00 |
| 2 | Warren | Oxford | 07863 | 19.63 |
| 3 | Middlesex | Keasbey | 08832 | 19.20 |
| 4 | Essex | Newark | 07114 | 15.88 |
| 5 | Mercer | Hopewell | 08525 | 15.86 |
| 6 | Middlesex | Fords | 08863 | 12.16 |
| 7 | Bergen | Maywood | 07607 | 11.74 |
| 8 | Passaic | Haskell | 07420 | 11.50 |
| 9 | Camden | Merchantville | 08109 | 10.32 |
| 10 | Ocean | West Creek | 08092 | 9.95 |
| 11 | Atlantic | Egg Harbor City | 08215 | 9.43 |
| 12 | Sussex | Sussex | 07461 | 8.36 |

| | | | | |
|----|------------|-------------------|-------|------|
| 13 | Bergen | New Milford | 07646 | 7.82 |
| 14 | Sussex | Highland Lakes | 07422 | 7.45 |
| 15 | Bergen | Fairview | 07022 | 7.29 |
| 16 | Bergen | Dumont | 07628 | 7.28 |
| 17 | Camden | Cherry Hill | 08034 | 7.08 |
| 18 | Camden | Somerdale | 08083 | 7.00 |
| 19 | Burlington | Florence | 08518 | 6.74 |
| 20 | Warren | Belvidere | 07823 | 6.47 |
| 21 | Burlington | Browns Mills | 08015 | 6.32 |
| 22 | Gloucester | West Deptford | 08086 | 6.20 |
| 23 | Burlington | Palmyra | 08065 | 6.07 |
| 24 | Ocean | New Egypt | 08533 | 5.98 |
| 25 | Monmouth | Bradley Beach | 07720 | 5.91 |
| 26 | Warren | Port Murray | 07865 | 5.57 |
| 27 | Bergen | Oradell | 07649 | 5.57 |
| 28 | Bergen | Wood-Ridge | 07075 | 5.54 |
| 29 | Hunterdon | Milford | 08848 | 5.36 |
| 30 | Union | Elizabeth | 07202 | 5.35 |
| 31 | Monmouth | Little Silver | 07739 | 5.16 |
| 32 | Bergen | Hasbrouck Heights | 07604 | 5.15 |
| 33 | Bergen | Carlstadt | 07072 | 5.05 |

Maps 1 and 2 in the Appendix show how these zip code areas with a potential child care supply gap are distributed across the state. Map 1 reveals that most areas except for some areas in dark orange color had a low level of children-to-slots ratio, indicating no sign of a child care supply gap. Map 2 highlights only the zip code areas with a ratio over 5. It suggests that areas with a potential supply gap were distributed across the state – from the south of Cape May County to the north of Warren County.

NARROW COST SURVEY RESULTS

As part of the MRS, the Lead Agency was required to examine how much it costs for child care providers to offer services to families so that the cost-based estimates of child care rates – referred to here as ‘narrow (i.e., basic) cost rates’ – can be considered in setting state assistance rates. The MRS asked respondents if they were interested in the NCA surveys. Of the MRS respondents, 1,080 center providers expressed interest in participating in the NCA survey. All of them were invited to the survey, and 23% (N=249) participated. Similarly, the MRS identified 507 family providers willing to participate in the NCA survey. All of the family providers were invited to the survey, and 17.55% (N=89) of them participated.

As one of the cost drivers of child care programs is enrollment size, it was important to examine cost variations by enrollment size. Therefore, center providers were classified into the following three groups – small (below 35 enrollees), medium (between 35 and 64 enrollees), and large (65 enrollees and beyond) - based on their enrollment size. Table 33 shows the percentage distribution of the center providers by their size.

Table 33. Center providers by enrollment size

| | Number (N=249) | Percent (%) |
|-------------------------------------|----------------|-------------|
| Small (less than 35 children) | 89 | 35.74 |
| Medium (between 35 and 64 children) | 79 | 31.73 |
| Large (65 children or more) | 56 | 22.49 |
| Missing enrollment data | 25 | 10.04 |

Before proceeding to the analyses, it is important to acknowledge that the number of center providers that responded to the NCA survey and provided information about major revenue items was too small to generate reliable statistics. The small sample sizes made it challenging to run subgroup analyses of total revenues by provider size and child age group.

Similarly, the number of family providers who responded to the NCA survey was also very small, and those who provided valid answers to the cost and revenue questions were even smaller. For example, of 98 family provider respondents, only about 30-40 shared their cost and revenue items. For the salary questions, the number was as small as 28 valid answers. Additionally, of the 38 family provider respondents who offered any information on annual tuition revenues, 10 respondents gave an implausible amount (e.g., less than \$1,000 per year). Only 25 family respondents provided answers to all cost items. **Due to these small sample sizes, the results of the NCA studies presented below may not be representative of the universe of child care providers in the state.**

I. Center Providers' Costs, Revenues, and Narrow Cost Rates

Table 34 below presents the estimated average annual total costs of center providers. Nearly 65% of the center providers' total costs were personnel costs, and 18% and 17% of the costs were building and program costs.

On average, the annual personnel cost of center providers was about \$369,410, and the average cost ranged from \$225,169 for small providers, to \$328,434 for medium-sized providers, to \$811,372 for large providers. Center providers rated at least 3-4 stars in the GNJK system had higher personnel costs than those rated 1-2 stars. The average program costs for all center providers were about \$97,347, and the average building costs were estimated to be about \$102,103. As expected, center providers that served infants, had larger enrollment and were rated higher by GNJK incurred higher program and building costs, compared to their counterparts.

Table 34. Center providers' average total costs: Amount (\$) and percent distribution

| | Annual Amount (\$) | | | Total | Percent (%) of Total Costs | | |
|-------------------------------|--------------------|---------|----------|-----------|----------------------------|---------|----------|
| | Personnel | Program | Building | | Personnel | Program | Building |
| All | 369,410 | 97,347 | 102,103 | 568,859 | 64.94 | 17.11 | 17.95 |
| Age group served | | | | | | | |
| Infant, toddler & preschooler | 437,463 | 121,832 | 126,154 | 685,449 | 63.82 | 17.77 | 18.40 |
| Toddler & preschooler | 452,563 | 119,044 | 109,753 | 681,359 | 66.42 | 17.47 | 16.11 |
| Preschooler | 245,304 | 56,867 | 67,268 | 369,439 | 66.40 | 15.39 | 18.21 |
| Enrollment size | | | | | | | |
| Small | 225,169 | 54,273 | 55,275 | 334,716 | 67.27 | 16.21 | 16.51 |
| Medium | 328,434 | 135,595 | 110,633 | 574,661 | 57.15 | 23.60 | 19.25 |
| Large | 811,372 | 162,367 | 220,581 | 1,194,320 | 67.94 | 13.59 | 18.47 |
| GNJK star level | | | | | | | |
| None | 326,742 | 95,066 | 84,737 | 506,544 | 64.50 | 18.77 | 16.73 |
| 1-2 star | 339,437 | 83,683 | 104,660 | 527,781 | 64.31 | 15.86 | 19.83 |
| 3-4 star | 668,829 | 144,174 | 186,256 | 999,258 | 66.93 | 14.43 | 18.64 |

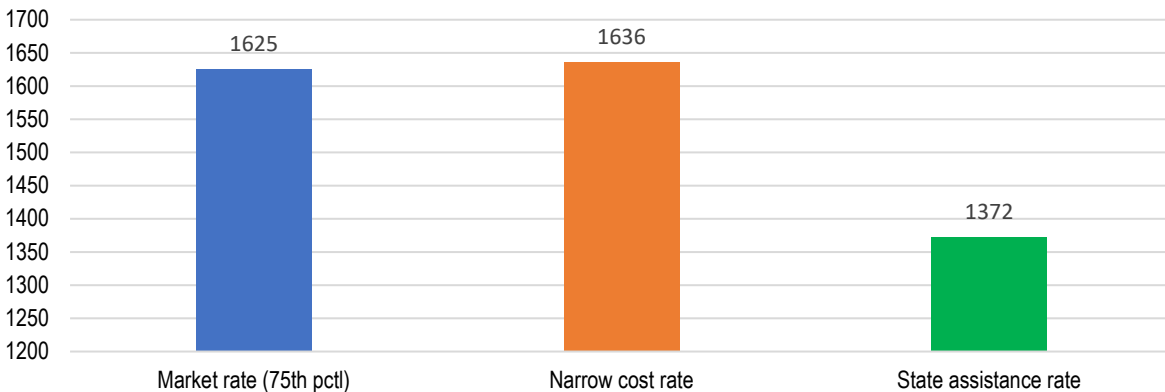
As for center providers' revenue sources, Table 35 shows that approximately 40% of their total revenues were from tuition, and 37% were from the state child care assistance program. Grant and other revenue sources were about 18% and 5% of their total revenues.

Table 35. Center providers' average total revenues (\$)

| | Tuition | State Assistance Program | Grant | Other | Total |
|-------------|---------|--------------------------|---------|--------|---------|
| Amount (\$) | 301,221 | 278,316 | 134,222 | 40,344 | 754,104 |
| Percent (%) | 39.94 | 36.91 | 17.80 | 5.35 | 100 |

Chart 14 presents the estimated *monthly narrow cost rates* for children of all age groups—the rates that cover the most basic costs of operating a child care program. The narrow cost rates were also compared to the 75th percentile market rates as well as the state assistance rates, using full-time monthly rates for toddlers. The 75th percentile market rate (\$1,625) for toddlers and the estimated narrow cost rate (\$1,636) were similar, but the state assistance rate (\$1,372) was considerably lower than both.

Chart 14. Rate (\$) comparison for center providers:
Using full-time monthly rates for toddlers



It was estimated that the 75th percentile full-time monthly narrow cost rates were \$1,607 for center providers serving infants and toddlers, \$1,663 for those serving preschoolers, and \$1,541 for providers serving school-age children.

The narrow cost rates were also estimated by center providers' size and GNJK star level. As Table 36 shows, small center providers had higher estimated narrow cost rates than large providers. Center providers with GNJK star levels of 3 or 4 had higher narrow cost rates than those with star levels of 1 or 2.

Table 36. Center providers' narrow cost rates (\$) by enrollment size and GNJK star level

| Enrollment Size | | GNJK star level | |
|-----------------|------|-----------------|------|
| Small | 2076 | None | 1410 |
| Medium | 1410 | 1-2 | 1459 |
| Large | 1338 | 3-4 | 1835 |

II. Family Providers' Costs, Revenues, and Narrow Cost Rate

As shown in Table 37, family providers' average annual personnel cost was \$38,116, more than 68% of their total costs (\$55,654). The average program cost of \$10,617 was about 19% of their total costs. The average building cost of \$10,059 was about 18% of the total costs.

Table 37. Family providers' average total costs: Amount (\$) and percent distribution

| Annual Amount (\$) | | | Total | Percent (%) of Total Costs | | |
|--------------------|---------|----------|--------|----------------------------|---------|----------|
| Personnel | Program | Building | | Personnel | Program | Building |
| 38,116 | 10,617 | 10,059 | 55,654 | 68.49 | 19.08 | 18.07 |

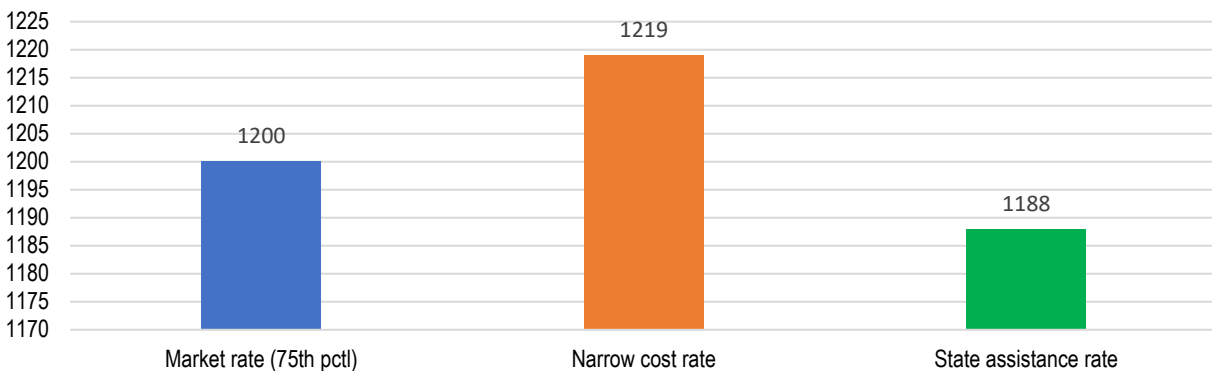
Table 38 presents family providers' revenue sources. Tuition accounted for 44% of their total annual revenue, state assistance nearly 37%, and grants and other sources of revenue about 8% and 11% of total revenue.

Table 38. Family providers' average total revenues (\$)

| | Tuition | State Assistance Program | Grant | Other | Total |
|-------------|---------|--------------------------|-------|-------|--------|
| Amount (\$) | 23,773 | 19,742 | 4,200 | 5,910 | 53,625 |
| Percent (%) | 44.33 | 36.81 | 7.83 | 11.01 | 100 |

Chart 15 presents the estimated full-time monthly narrow cost rates for family providers, using toddlers as an example. The 75th percentile market rate (\$1,200) and the estimated narrow cost rate (\$1,219) were similar, but the state assistance rate (\$1,188) was slightly lower than the two rates. Please note that all family providers in the cost analyses served infants, toddlers, and preschoolers. As only four family providers in the NCA data had a GNJK star level, no further analyses on the quality indicator were possible.

Chart 15. Rate (\$) comparison for family providers:
Using full-time monthly rates for toddlers



MISCELLANEOUS ANALYSES

I. Days and Hours of Full-Time Care

The MRS instruments included questions about how child care providers define full-time care. Table 39 shows that most providers – 87% of center providers, 89% of family providers, and 90% of youth camp providers – defined 5 days of weekly care as full-time care. However, a non-negligible proportion of providers – 12% of center providers, 5% of family providers, and 6% of youth camp providers – included less than 5 days per week as full-time care.

As for the daily hours of care, most providers – 79% of center providers, 76% of family providers, and 94% of youth camp providers – defined at least 6 hours of daily care as full-time care. However, nearly 21% of center providers and 24% of family providers included less than 6 hours per day as full-time care. For the most part, it appears the following two arrangements - (1) less than 6 hours of daily care but for 5 days per week and (2) at least 6 hours of daily care but for fewer than 5 days per week – are considered part-time care.

Table 39. Minimum weekly days and daily hours for full-time care

| | Center Provider | Family Provider | Camp Provider |
|-------------------------|------------------------|------------------------|----------------------|
| Number of days per week | | | |
| Less than 5 days | 12.00 | 4.98 | 6.37 |
| 5 days | 87.00 | 89.12 | 89.96 |
| More than 5 days | 1.00 | 5.90 | 4.30 |
| Number of hours per day | | | |
| Less than 6 hours | 20.98 | 24.04 | 5.70 |
| At least 6 hours | 79.02 | 75.96 | 94.30 |

II. Post-COVID Changes in Tuition, Enrollment, and Staff Size

Chart 16 shows the changes center providers experienced last year with the number of operation hours, enrollment size, staff size, and tuition. Nearly 64% of the providers reported having to increase tuition last year. About 41% experienced a decrease in enrollment, and 28% had a decline in the size of staff last year. However, about 30% of center providers had an increase in enrollment, and 32% also had an increase in the staff number last year. Approximately 31% reported that their tuition stayed the same last year.

More than 83% of the center providers that raised their tuition identified inflated supply costs as one of the reasons for tuition increase. In addition, more than 61% of the providers reported increased operational expenses as a reason for tuition increases.

Chart 16. Percentage (%) of center providers with changes in operation hours, enrollment, staff size, and tuition last year

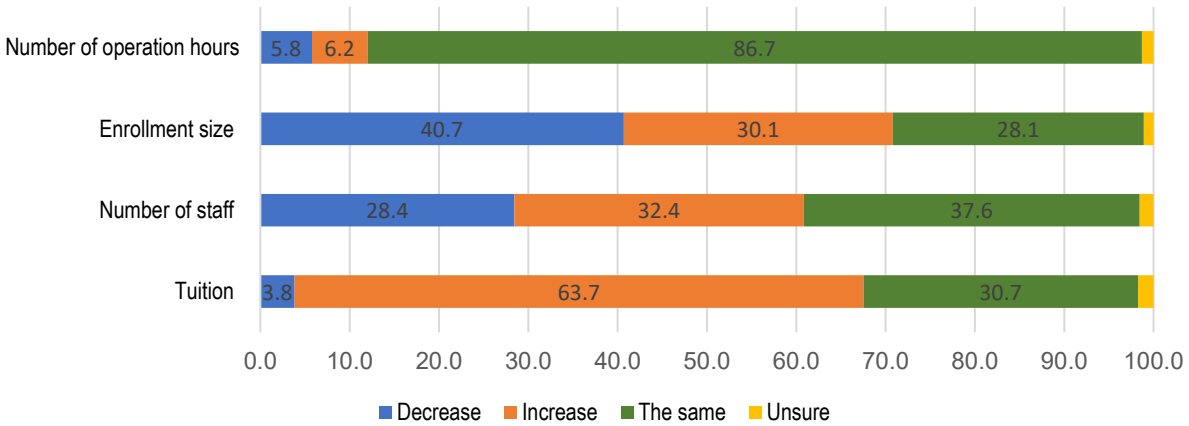


Chart 17. Percentage (%) of family providers with changes in operation hours, enrollment, and tuition last year

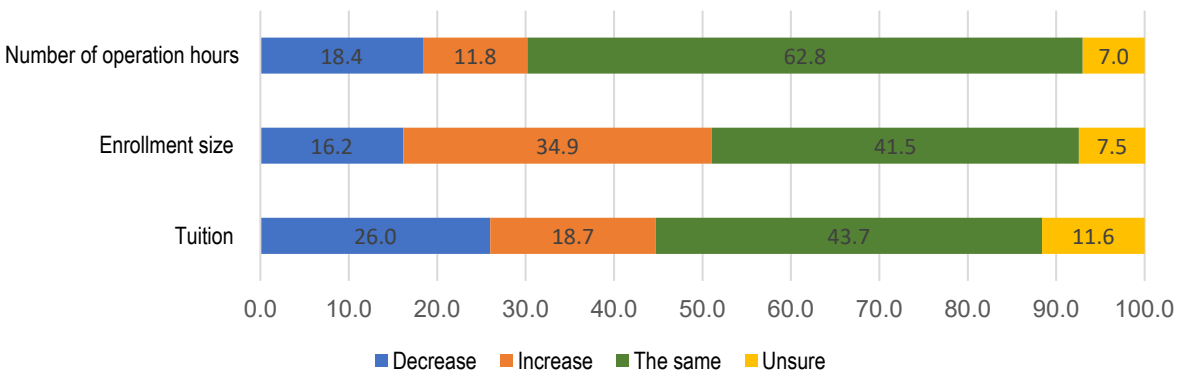


Chart 17 above shows that some 40% of family providers did not experience any changes in enrollment size and tuition last year. However, approximately 19% had an increase in their tuition and 35% had an increase in enrollment. Still, 16% had a decline in enrollment, and 26% lowered their tuition. Interestingly, more than 18% of family providers reported that their operating hours declined last year.

Of the family providers that increased their tuition last year, 81% reported increased operational expenses as one of the reasons. About 54% identified COVID-related health and safety expenses as a reason for tuition increases. Some 35% noted inflated supply costs as one of the reasons.

Chart 18. Percentage (%) of summer youth camp providers with changes in operation hours, enrollment, staff number, and tuition last year

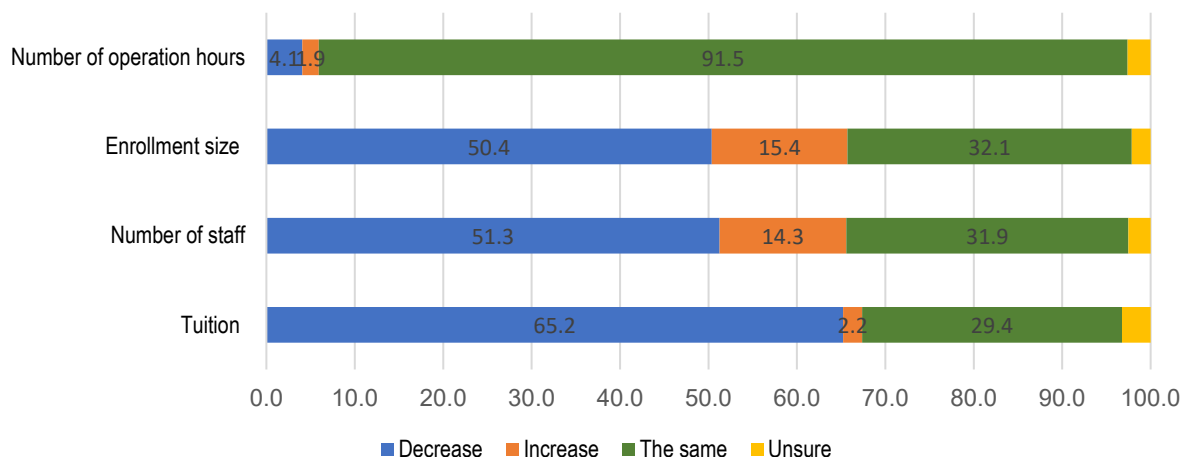


Chart 18 above suggests that more than 50% of summer youth camp providers experienced declines in enrollment size and number of staff last year. Only about 14% experienced increases in enrollment and staff sizes. More than 65% reported reducing their tuition last year. Less than 30% of camp providers said their enrollment, staffing, and tuition stayed the same last year.

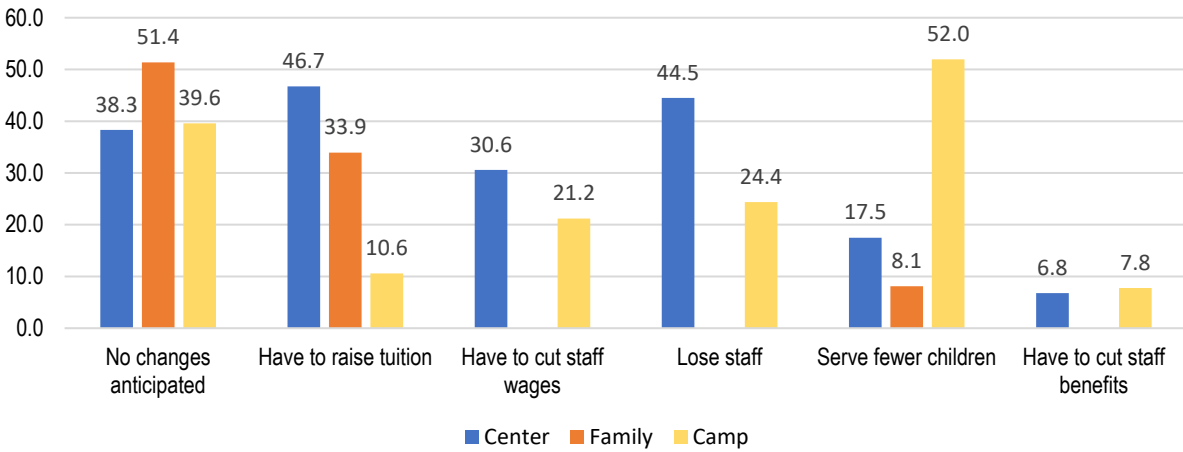
Similar to the center and family providers, 64% and 71% of summer youth camp providers that raised their tuitions pointed out increased operational and supply costs as the reasons for tuition increases. Only about 7% of camp providers noted COVID-related health and safety expenses as a reason for tuition increases.

III. Anticipated Changes in the Upcoming School Year

Chart 19 below shows the percentage of providers that anticipated changes in tuition and staffing in the upcoming school year. Note that as the providers were allowed to choose multiple answers to this survey question, the total percentages totaled greater than 100%.

Among center providers, 47% reported anticipating the need to raise tuition in the upcoming year. About 45% expected to lose their staff, and 31% expected the need to cut staff wages in the upcoming year. Slightly more than 51% of family providers reported not anticipating any changes. On the other hand, more than half of the youth camp providers noted that they anticipated serving fewer children in the upcoming school year.

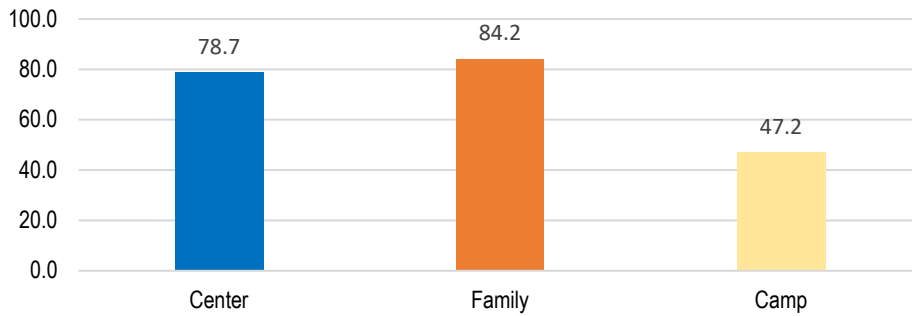
Chart 19. Percentage (%) of providers with anticipated changes in the coming year



IV. Participation in the State Assistance Program

According to Chart 20, nearly 79% of center providers, 84% of family providers, and 47% of summer youth camp providers were serving children who were participating in the state child care assistance program in 2023.

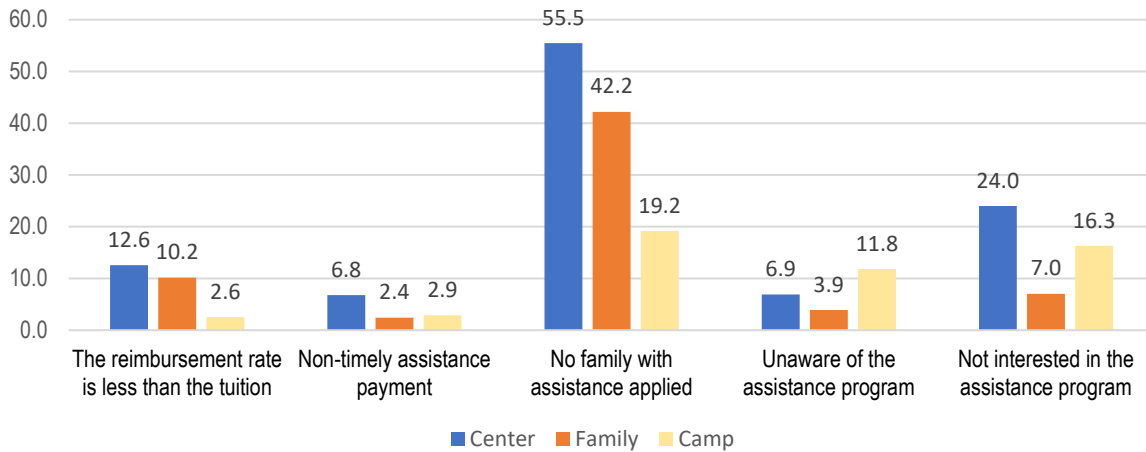
Chart 20. Percentage (%) of providers currently serving children on assistance



Of those providers, 44.85% of center providers, 36.46% of family providers, and 41.84% of summer youth camp providers reported charging families the difference between their tuition and the reimbursement rates received through the assistance program.

Chart 21 shows many reasons for providers' non-participation in the state assistance program. The primary reason was not having families with assistance who applied to the providers' programs - more than 55% of center providers, 42% of family providers, and 19% of camp providers did not have any families receiving assistance who applied to their programs. About a quarter of center providers reported not being interested in the assistance program.

Chart 21. Percentages (%) with reasons for not participating in state assistance program



Of those currently not participating in the state assistance program, 39% of center providers, 71% of family providers, and 35% of camp providers expressed interest in participating in the program.

CONCLUSION

The data for this MRS came from (1) center providers that served a total of 153,878 children of all age groups, (2) family providers that served a total of 2,170 children of all age groups, and (3) summer youth camp providers that served as many as 28,714 school-age children.

The analyses of MRS data indicated that nearly 64% of center providers increased their tuition between 2022 and 2023, and the primary reason for the tuition increase was inflated supply costs and operational expenses. For family providers, only about 19% increased tuition between 2022 and 2023. These tuition increases appear to have affected the statewide market rates in 2023. When the state child care assistance rates (with the \$300 differential payments) were compared with the market rates, **the assistance rates were consistently below the 75th percentile market rates for all age groups of children.** It is important to note that **the estimated narrow cost rates were similar to the 75th percentile market rates** for both center providers and family providers although the small sample sizes of the narrow cost analyses might have compromised the estimates' reliability.

As expected, the **child care market rates varied considerably by geographic location and quality indicator.** The least expensive county's market rate was only about 60% of the most expensive county's market rate. Similarly, the full-time rate for toddlers in the most expensive zip code areas was more than 40% higher than the rate in the least

expensive areas. Accredited center providers' market rates were consistently higher than non-accredited providers' rates. Interestingly, however, center providers with higher GNJK star levels did not necessarily have higher market rates.

As for future studies, it may be a good idea to combine the MRS instruments and the NCA survey instruments to reduce child care providers' burdens on the surveys and increase the number of respondents for the NCA contents. A sufficient number of NCA survey respondents is likely to improve the reliability and accuracy of the estimated narrow cost rates in the future.

Appendix Tables

Table A-1. Percent responded to the MRS by provider type

| | Center Provider | | | Family Provider | | | Summer youth Camp Provider | | |
|------------------|---------------------|------------------|--------------|---------------------|------------------|--------------|----------------------------|------------------|--------------|
| | Number of providers | Number responded | % | Number of providers | Number responded | % | Number of providers | Number responded | % |
| Statewide | 3975 | 2599 | 65.38 | 1238 | 837 | 67.61 | 1045 | 313 | 29.95 |
| Atlantic | 100 | 79 | 79.00 | 39 | 27 | 69.23 | 24 | 6 | 25.00 |
| Bergen | 425 | 298 | 70.12 | 55 | 46 | 83.64 | 121 | 42 | 34.71 |
| Burlington | 139 | 116 | 83.45 | 51 | 37 | 72.55 | 44 | 24 | 54.55 |
| Camden | 222 | 188 | 84.68 | 130 | 117 | 90.00 | 47 | 17 | 36.17 |
| Cape May | 26 | 18 | 69.23 | 7 | 2 | 28.57 | 9 | 1 | 11.11 |
| Cumberland | 60 | 44 | 73.33 | 36 | 25 | 69.44 | 5 | 3 | 60.00 |
| Essex | 468 | 295 | 63.03 | 181 | 138 | 76.24 | 126 | 30 | 23.81 |
| Gloucester | 122 | 92 | 75.41 | 16 | 6 | 37.50 | 14 | 6 | 42.86 |
| Hudson | 400 | 250 | 62.50 | 95 | 50 | 52.63 | 45 | 12 | 26.67 |
| Hunterdon | 61 | 53 | 86.89 | 3 | 2 | 66.67 | 22 | 7 | 31.82 |
| Mercer | 190 | 136 | 71.58 | 24 | 16 | 66.67 | 94 | 25 | 26.60 |
| Middlesex | 334 | 194 | 58.08 | 116 | 75 | 64.66 | 69 | 30 | 43.48 |
| Monmouth | 253 | 133 | 52.57 | 45 | 31 | 68.89 | 87 | 26 | 29.89 |
| Morris | 237 | 150 | 63.29 | 35 | 31 | 88.57 | 93 | 27 | 29.03 |
| Ocean | 152 | 99 | 65.13 | 25 | 7 | 28.00 | 31 | 4 | 12.90 |
| Passaic | 244 | 161 | 65.98 | 256 | 144 | 56.25 | 52 | 15 | 28.85 |
| Salem | 18 | 13 | 72.22 | 16 | 13 | 81.25 | 7 | 1 | 14.29 |
| Somerset | 154 | 100 | 64.94 | 10 | 7 | 70.00 | 45 | 13 | 28.89 |
| Sussex | 59 | 32 | 54.24 | 7 | 4 | 57.14 | 30 | 10 | 33.33 |
| Union | 267 | 113 | 42.32 | 67 | 43 | 64.18 | 60 | 13 | 21.67 |
| Warren | 44 | 35 | 79.55 | 24 | 16 | 66.67 | 20 | 1 | 5.00 |

*Note that of 2,599 center providers, 94 were free programs (Head Start, Early Head Start, or free public programs), and 2,505 were fee-charging programs. This means that 3,881 center providers were eligible for MRS, and the response rate among the eligible centers was 64.54%.

Table A-2. Number of desired and current enrollment by age group for center providers

| | Infant | | Toddler | | Preschooler | | School-Age | |
|------------------|--------------|--------------|-------------|--------------|--------------|--------------|--------------|--------------|
| | Desired | Current | Desired | Current | Desired | Current | Desired | Current |
| Statewide | 20305 | 13619 | 3713 | 27206 | 90764 | 70723 | 72101 | 42330 |
| Atlantic | 489 | 284 | 803 | 544 | 1709 | 1353 | 1972 | 1407 |
| Bergen | 1979 | 1505 | 4357 | 3298 | 10372 | 8241 | 25523 | 4674 |
| Burlington | 1043 | 748 | 2038 | 1528 | 4015 | 3005 | 2296 | 1663 |
| Camden | 2934 | 952 | 3851 | 1750 | 7280 | 4468 | 6145 | 3424 |
| Cape May | 74 | 68 | 163 | 141 | 427 | 282 | 243 | 226 |
| Cumberland | 277 | 192 | 529 | 321 | 1595 | 1198 | 1432 | 704 |
| Essex | 1875 | 1414 | 3847 | 2945 | 11439 | 9216 | 5880 | 3988 |
| Gloucester | 520 | 384 | 927 | 744 | 2354 | 1733 | 2190 | 1834 |
| Hudson | 1788 | 1207 | 3375 | 2273 | 7873 | 6694 | 4080 | 4665 |
| Hunterdon | 279 | 210 | 487 | 441 | 960 | 808 | 105 | 82 |
| Mercer | 949 | 652 | 1603 | 1173 | 4699 | 3904 | 2722 | 2088 |
| Middlesex | 1214 | 803 | 2832 | 2004 | 6915 | 4759 | 3337 | 2884 |
| Monmouth | 1042 | 822 | 2591 | 2253 | 5748 | 4722 | 2173 | 1585 |
| Morris | 1211 | 979 | 2144 | 1726 | 6035 | 4799 | 2086 | 1370 |
| Ocean | 1598 | 1250 | 2114 | 1732 | 3497 | 2734 | 1199 | 925 |
| Passaic | 1095 | 736 | 1834 | 1308 | 5818 | 4734 | 4762 | 6504 |
| Salem | 121 | 104 | 171 | 144 | 260 | 225 | 315 | 193 |
| Somerset | 741 | 477 | 1626 | 1132 | 3641 | 2753 | 2389 | 1886 |
| Sussex | 157 | 160 | 321 | 261 | 856 | 752 | 397 | 438 |
| Union | 760 | 567 | 1657 | 1312 | 4485 | 3745 | 2269 | 1353 |
| Warren | 160 | 105 | 243 | 175 | 787 | 600 | 587 | 438 |

Table A-3. Number of desired and current enrollment by age group for family providers

| | Infant | | Toddler | | Preschooler | | School-Age | |
|------------------|---------|---------|---------|---------|-------------|---------|------------|---------|
| | Desired | Current | Desired | Current | Desired | Current | Desired | Current |
| Statewide | 915 | 386 | 1148 | 761 | 888 | 474 | 751 | 549 |
| Atlantic | 32 | 9 | 41 | 38 | 36 | 17 | 42 | 33 |
| Bergen | 32 | 10 | 36 | 34 | 39 | 23 | 32 | 19 |
| Burlington | 49 | 14 | 66 | 42 | 55 | 21 | 45 | 22 |
| Camden | 147 | 53 | 202 | 138 | 162 | 100 | 131 | 109 |
| Cape May | 2 | 2 | 8 | 6 | 2 | 1 | -- | 1 |
| Cumberland | 31 | 16 | 48 | 28 | 37 | 30 | 30 | 34 |
| Essex | 194 | 89 | 226 | 166 | 146 | 87 | 122 | 107 |
| Gloucester | 8 | 1 | 11 | 11 | 15 | 8 | 12 | 8 |
| Hudson | 45 | 18 | 46 | 22 | 47 | 22 | 68 | 32 |
| Hunterdon | 1 | 1 | 2 | 1 | 4 | 3 | 8 | 7 |
| Mercer | 19 | 7 | 36 | 21 | 33 | 19 | 23 | 5 |
| Middlesex | 73 | 31 | 88 | 48 | 46 | 22 | 37 | 28 |
| Monmouth | 41 | 18 | 50 | 20 | 32 | 18 | 45 | 35 |
| Morris | 26 | 17 | 31 | 22 | 26 | 14 | 10 | 8 |
| Ocean | 4 | 4 | 11 | 13 | 10 | 4 | 1 | 1 |
| Passaic | 114 | 55 | 113 | 69 | 90 | 35 | 76 | 48 |
| Salem | 23 | 12 | 31 | 17 | 26 | 8 | 20 | 12 |
| Somerset | 10 | 2 | 16 | 9 | 12 | 2 | 3 | -- |
| Sussex | 6 | 3 | 4 | 7 | 5 | 3 | -- | 1 |
| Union | 37 | 15 | 55 | 31 | 32 | 13 | 24 | 18 |
| Warren | 21 | 9 | 27 | 18 | 33 | 24 | 22 | 21 |

Table A-4. Number of desired and current enrollment by age group for summer youth camp providers

| | School-Age | |
|------------------|------------|---------|
| | Desired | Current |
| Statewide | 31680 | 28,714 |
| Atlantic | 490 | 340 |
| Bergen | 4658 | 4459 |
| Burlington | 3205 | 3359 |
| Camden | 1151 | 924 |
| Cape May | 75 | 65 |
| Cumberland | 250 | 193 |
| Essex | 4195 | 3270 |
| Gloucester | 1045 | 967 |
| Hudson | 227 | 456 |
| Hunterdon | 187 | 165 |
| Mercer | 2853 | 1980 |
| Middlesex | 3428 | 4082 |
| Monmouth | 2232 | 1755 |
| Morris | 1942 | 1690 |
| Ocean | 315 | 195 |
| Passaic | 1669 | 1536 |
| Salem | 120 | 88 |
| Somerset | 2099 | 1859 |
| Sussex | 510 | 436 |
| Union | 1029 | 895 |
| Warren | -- | -- |

Note: The table does not present information for infants, toddlers, and preschoolers because too small numbers of camp providers answered the questions for infants (n=4), toddlers (n=11), and preschoolers (n=56).

Table A-5. Center providers' 75th percentile rates for full-time care by county

| | Infant | | | Toddler | | | Preschooler | | | School-Age | | |
|------------------|-----------|------------|-------------|-----------|------------|-------------|-------------|------------|-------------|------------|------------|-------------|
| | D | W | M | D | W | M | D | W | M | D | W | M |
| Statewide | 86 | 400 | 1750 | 82 | 375 | 1625 | 75 | 345 | 1462 | 70 | 300 | 1213 |
| Atlantic | 77 | 350 | 1422 | 77 | 317 | 1257 | 60 | 290 | 1140 | 63 | 300 | 1167 |
| Bergen | 93 | 445 | 1780 | 88 | 420 | 1685 | 83 | 378 | 1540 | 70 | 275 | 997 |
| Burlington | 90 | 382 | 1720 | 83 | 370 | 1612 | 76 | 335 | 1470 | 76 | 310 | 1350 |
| Camden | 74 | 386 | 1733 | 70 | 344 | 1628 | 58 | 310 | 1370 | 54 | 270 | 1167 |
| Cape May | 66 | 333 | 1332 | 66 | 332 | 1326 | 57 | 284 | 1137 | 39 | 140 | 320 |
| Cumberland | 65 | 293 | 1183 | 60 | 275 | 1028 | 60 | 250 | 1050 | 60 | 300 | 1200 |
| Essex | 80 | 405 | 1750 | 80 | 375 | 1646 | 75 | 360 | 1517 | 65 | 275 | 1167 |
| Gloucester | 80 | 373 | 1614 | 77 | 357 | 1537 | 70 | 322 | 1450 | 57 | 240 | 827 |
| Hudson | 85 | 400 | 1800 | 83 | 350 | 1790 | 79 | 320 | 1550 | 70 | 300 | 1300 |
| Hunterdon | 123 | 425 | 1699 | 95 | 400 | 1635 | 89 | 400 | 1650 | 82 | 410 | 1398 |
| Mercer | 100 | 420 | 1950 | 95 | 384 | 1700 | 85 | 350 | 1515 | 75 | 310 | 1200 |
| Middlesex | 110 | 394 | 1676 | 100 | 374 | 1541 | 88 | 335 | 1390 | 69 | 300 | 1200 |
| Monmouth | 89 | 407 | 1656 | 81 | 375 | 1535 | 79 | 350 | 1450 | 78 | 350 | 1400 |
| Morris | 90 | 424 | 1785 | 90 | 410 | 1695 | 82 | 383 | 1530 | 92 | 383 | 1565 |
| Ocean | 81 | 363 | 1775 | 75 | 335 | 1518 | 70 | 304 | 1300 | 68 | 268 | 1200 |
| Passaic | 84 | 395 | 1625 | 80 | 375 | 1575 | 75 | 329 | 1440 | 68 | 300 | 1200 |
| Salem | 70 | 303 | 1310 | 70 | 303 | 1310 | 56 | 283 | 1215 | 36 | 180 | 735 |
| Somerset | 90 | 425 | 1820 | 83 | 415 | 1800 | 79 | 392 | 1668 | 74 | 355 | 1525 |
| Sussex | 104 | 355 | 1575 | 91 | 325 | 1504 | 75 | 300 | 1213 | 32 | 250 | 780 |
| Union | 82 | 408 | 1895 | 82 | 408 | 1795 | 87 | 412 | 1595 | 94 | 425 | 1665 |
| Warren | 135 | 360 | 1375 | 125 | 325 | 1275 | 95 | 285 | 1200 | 100 | 270 | 900 |

Note. D: Daily; W: Weekly; M: Monthly

Table A-6. Center providers' 75th percentile rates for part-time care by county

| | Infant | | | Toddler | | | Preschooler | | | School-Age | | |
|------------------|-----------|------------|-------------|-----------|------------|-------------|-------------|------------|-------------|------------|------------|------------|
| | D | W | M | D | W | M | D | W | M | D | W | M |
| Statewide | 64 | 300 | 1255 | 61 | 288 | 1204 | 54 | 256 | 1090 | 50 | 215 | 867 |
| Atlantic | 66 | 223 | 952 | 62 | 200 | 840 | 50 | 200 | 744 | 46 | 225 | 720 |
| Bergen | 68 | 325 | 1399 | 64 | 328 | 1350 | 62 | 319 | 1250 | 45 | 210 | 750 |
| Burlington | 88 | 295 | 1290 | 74 | 282 | 1225 | 73 | 270 | 1125 | 60 | 254 | 1053 |
| Camden | 57 | 309 | 1240 | 48 | 272 | 1119 | 47 | 240 | 980 | 30 | 150 | 690 |
| Cape May | 40 | 218 | 1032 | 30 | 218 | 870 | 30 | 188 | 751 | -- | -- | -- |
| Cumberland | 64 | 200 | 780 | 54 | 190 | 760 | 57 | 200 | 648 | 57 | 285 | 1140 |
| Essex | 50 | 310 | 1100 | 55 | 296 | 1184 | 48 | 245 | 995 | 30 | 150 | 604 |
| Gloucester | 81 | 290 | 1161 | 70 | 270 | 1224 | 65 | 255 | 1026 | 40 | 199 | 796 |
| Hudson | 50 | 288 | 1450 | 60 | 288 | 1458 | 52 | 200 | 1388 | 45 | 225 | 865 |
| Hunterdon | 78 | 250 | 1195 | 75 | 355 | 1057 | 68 | 340 | 969 | -- | -- | -- |
| Mercer | 65 | 317 | 1375 | 65 | 295 | 1264 | 54 | 258 | 1200 | 65 | 251 | 1088 |
| Middlesex | 88 | 306 | 1288 | 70 | 288 | 1260 | 54 | 268 | 1093 | 53 | 231 | 864 |
| Monmouth | 65 | 313 | 1267 | 63 | 300 | 1248 | 58 | 265 | 1144 | 60 | 265 | 950 |
| Morris | 60 | 302 | 1235 | 60 | 300 | 1174 | 55 | 261 | 1122 | 70 | 235 | 1061 |
| Ocean | 60 | 226 | 900 | 54 | 245 | 983 | 51 | 215 | 844 | 44 | 175 | 700 |
| Passaic | 60 | 280 | 1083 | 55 | 275 | 1013 | 50 | 226 | 900 | 50 | 200 | 745 |
| Salem | 49 | 245 | 300 | 49 | 245 | 612 | 36 | 245 | 1055 | -- | -- | -- |
| Somerset | 63 | 312 | 1510 | 62 | 312 | 1365 | 58 | 288 | 1250 | 53 | 265 | 1150 |
| Sussex | 60 | 296 | 1282 | 55 | 261 | 1128 | 50 | 205 | 758 | -- | 290 | -- |
| Union | 38 | 238 | 1150 | 36 | 275 | 1070 | 45 | 230 | 1010 | 53 | 230 | 900 |
| Warren | 100 | 290 | 1160 | 95 | 250 | 1000 | 80 | 235 | 940 | -- | 165 | -- |

Note. D: Daily; W: Weekly; M: Monthly

Table A-7. Family providers' 75th percentile rates for full-time care by county

| | Infant | | | Toddler | | | Preschooler | | | School-Age | | |
|------------------|-----------|------------|-------------|-----------|------------|-------------|-------------|------------|-------------|------------|------------|-------------|
| | D | W | M | D | W | M | D | W | M | D | W | M |
| Statewide | 64 | 300 | 1250 | 60 | 300 | 1200 | 60 | 280 | 1140 | 50 | 250 | 1080 |
| Atlantic | 61 | 303 | 1218 | 65 | 300 | 1200 | 55 | 250 | 1000 | 55 | 240 | 962 |
| Bergen | 70 | 325 | 1300 | 65 | 325 | 1300 | 61 | 300 | 1240 | 65 | 280 | 1120 |
| Burlington | 54 | 250 | 1100 | 50 | 250 | 1083 | 50 | 225 | 974 | 50 | 200 | 940 |
| Camden | 60 | 300 | 1200 | 60 | 300 | 1200 | 55 | 270 | 1100 | 50 | 250 | 1080 |
| Cape May | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- |
| Cumberland | 55 | 274 | 1200 | 55 | 275 | 1188 | 50 | 242 | 1041 | 48 | 240 | 1041 |
| Essex | 64 | 320 | 1300 | 60 | 300 | 1200 | 55 | 274 | 1100 | 50 | 250 | 1080 |
| Gloucester | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- |
| Hudson | 70 | 350 | 1380 | 56 | 280 | 1200 | 55 | 275 | 1200 | 50 | 250 | 1061 |
| Hunterdon | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- |
| Mercer | 68 | 300 | 1200 | 60 | 300 | 1200 | 50 | 275 | 1007 | 48 | 320 | 1200 |
| Middlesex | 70 | 350 | 1400 | 70 | 325 | 1300 | 60 | 300 | 1200 | 60 | 300 | 1200 |
| Monmouth | 65 | 325 | 1290 | 65 | 295 | 1188 | 50 | 250 | 1041 | 55 | 250 | 1041 |
| Morris | 70 | 350 | 1400 | 70 | 350 | 1400 | 70 | 350 | 1360 | 60 | 300 | 1200 |
| Ocean | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- |
| Passaic | 60 | 300 | 1200 | 55 | 280 | 1097 | 50 | 250 | 1000 | 47 | 200 | 948 |
| Salem | 55 | 274 | 1188 | 55 | 274 | 1100 | 55 | 250 | 1000 | 60 | 250 | 1041 |
| Somerset | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- |
| Sussex | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- |
| Union | 60 | 300 | 1200 | 54 | 273 | 1170 | 50 | 250 | 1000 | 50 | 250 | 950 |
| Warren | 70 | 350 | 1400 | 60 | 300 | 1188 | 63 | 310 | 1200 | 65 | 320 | 1200 |

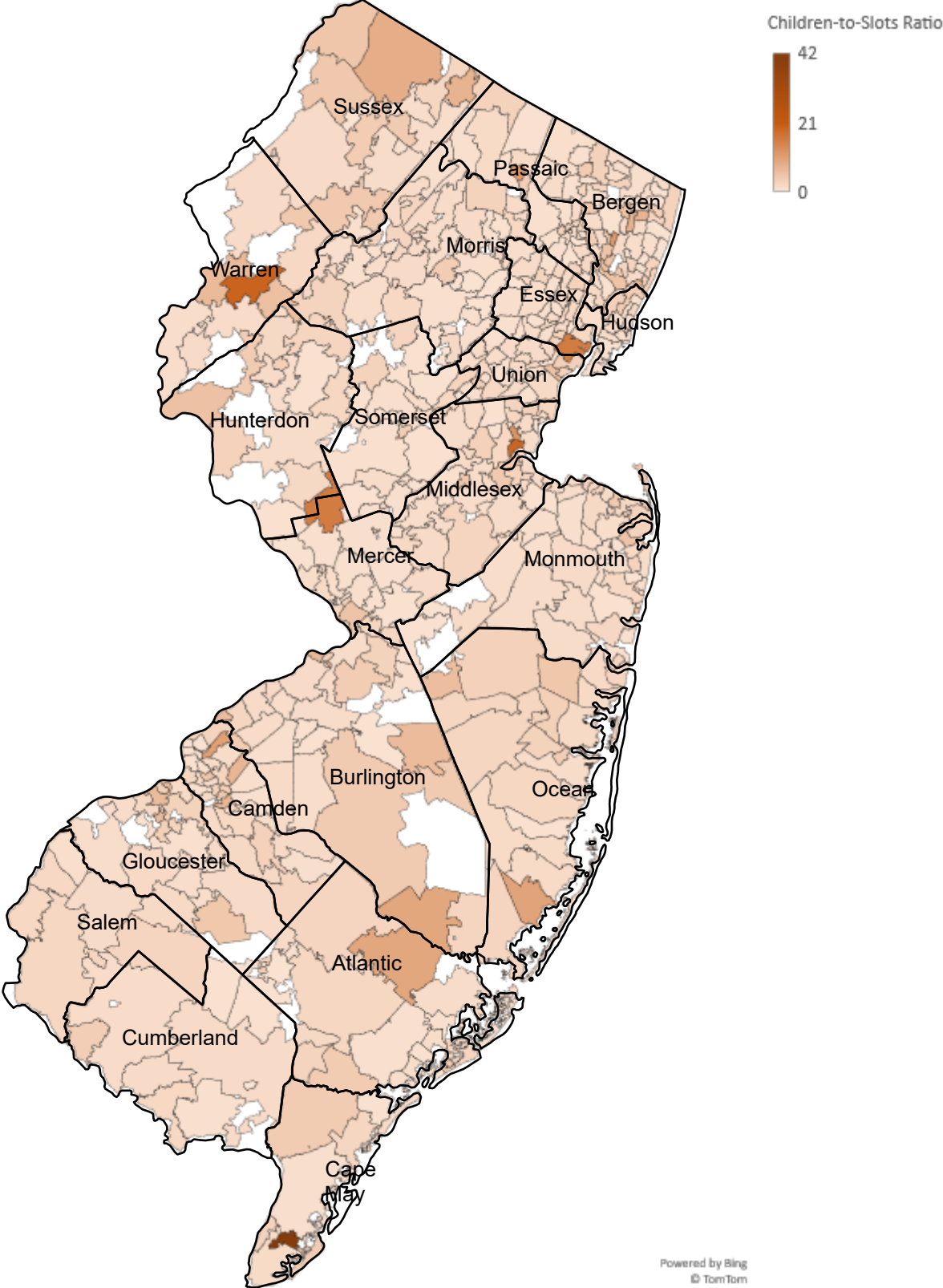
Note. D: Daily; W: Weekly; M: Monthly

Table A-8. Family providers' 75th percentile rates for part-time care by county

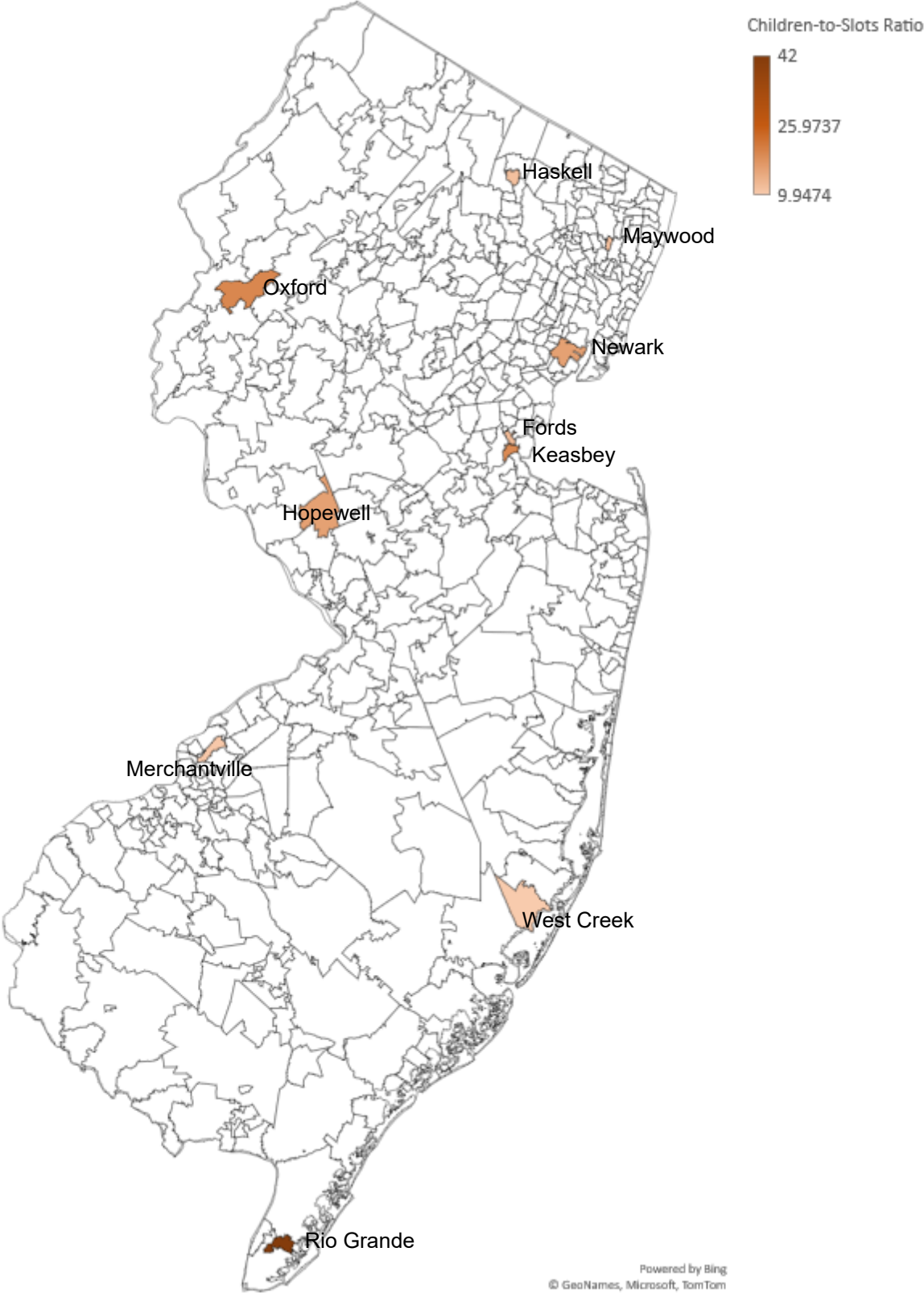
| | Infant | | | Toddler | | | Preschooler | | | School-Age | | |
|------------------|-----------|------------|------------|-----------|------------|------------|-------------|------------|------------|------------|------------|------------|
| | D | W | M | D | W | M | D | W | M | D | W | M |
| Statewide | 40 | 200 | 800 | 40 | 180 | 800 | 40 | 175 | 720 | 35 | 150 | 650 |
| Atlantic | 40 | 200 | 800 | 40 | 168 | 700 | 31 | 160 | 625 | 28 | 150 | 600 |
| Bergen | 59 | 250 | 1000 | 50 | 225 | 900 | 50 | 225 | 900 | 45 | 175 | 800 |
| Burlington | 35 | 150 | 650 | 30 | 150 | 650 | 28 | 134 | 720 | 25 | 110 | 541 |
| Camden | 35 | 162 | 700 | 35 | 154 | 650 | 30 | 150 | 642 | 30 | 150 | 600 |
| Cape May | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- |
| Cumberland | 35 | 179 | 744 | 35 | 175 | 700 | 30 | 150 | 600 | 30 | 150 | 600 |
| Essex | 40 | 190 | 800 | 40 | 175 | 700 | 40 | 160 | 700 | 35 | 150 | 640 |
| Gloucester | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- |
| Hudson | 50 | 200 | 800 | 40 | 200 | 800 | 40 | 170 | 800 | 30 | 150 | 700 |
| Hunterdon | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- |
| Mercer | 50 | 250 | 650 | 40 | 175 | 521 | 40 | 119 | 504 | 46 | 138 | 550 |
| Middlesex | 40 | 200 | 800 | 40 | 200 | 800 | 50 | 180 | 800 | 40 | 180 | 800 |
| Monmouth | 59 | 200 | 800 | 50 | 200 | 750 | 40 | 175 | 570 | 30 | 160 | 650 |
| Morris | 40 | 200 | 900 | 40 | 225 | 800 | 40 | 200 | 840 | -- | -- | -- |
| Ocean | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- |
| Passaic | 40 | 180 | 750 | 40 | 175 | 720 | 30 | 150 | 640 | 25 | 125 | 513 |
| Salem | 45 | 200 | 800 | 40 | 200 | 800 | 45 | 200 | 800 | 40 | 125 | 800 |
| Somerset | -- | 188 | 813 | -- | 161 | 697 | -- | 150 | 632 | -- | -- | -- |
| Sussex | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- |
| Union | 40 | 200 | 800 | 37.51 | 188 | 750 | 30 | 150 | 600 | 30 | 150 | 600 |
| Warren | 60 | 200 | 800 | 47.50 | 188 | 800 | 40 | 188 | 670 | 43 | 188 | 800 |

Note. D: Daily; W: Weekly; M: Monthly

Map 1. Statewide Children-to-Slots Ratio



Map 2. Areas with a Children-to-Slots Ratio of At Least 10



2023 MARKET RATE SURVEY INSTRUMENTS

On the following pages:

- Licensed Center Survey
- Family Child Care (FCC) Provider Survey
- Summer Youth Camp Survey



State of New Jersey

DEPARTMENT OF HUMAN SERVICES
DIVISION OF FAMILY DEVELOPMENT
PO BOX 716
TRENTON, NJ 08625-0716

Section 1: Cover Letter

2023 NJ Child Care Market Rate Survey

. Dear Child Care Center and/or Program Director:

The Office of Child Care within the Division of Family Development (DFD) of the NJ Department of Human Services is required by federal law to conduct a child care market rate survey.

The survey is designed to collect accurate, up-to-date child care rates that families pay for early education and care

services and to study how these rates vary by location, child age, and type of child care.

The data collected by this survey will inform policy and budget planning for the state's Child Care Assistance Program.

This survey is being emailed to all child care providers in New Jersey for their participation. Your participation is critical and necessary to ensure that the collected data adequately reflect all child care providers across the state. Please rest assured that your answers will remain completely confidential.

Here are instructions to follow in filling out the survey:

- You will have up to 27 questions, and it will likely take approximately 15 minutes to complete the survey.
- If your center operates in multiple site locations with different business names but shares the same email address, please fill out the survey for each site location so that we can collect geographically varying data.
- Please complete all the questions and submit your answers as soon as possible.

If you have any questions regarding this survey, please contact us at 609-631-2688 or DFD-MarketRateStudy@dhs.nj.gov
Thank you in advance for your time and participation.

Division of Family Development

NJ Department of Human Services

Section 2: Identification

Q1. Please enter your center/program's contact information.

Center/School Name

Address

City

County

5-Digit Zip Code

Phone Number

Email

NJCCIS ID

License ID

Q2.

Which of the following program types describe your center/program? Please check all that apply.

Yes

A Head Start or Early Head Start program

A free public program

A licensed child care center

A community-based licensed center partnering with a school district

A license-exempt child care center or program

A before-and after-school program

Section 3: Rates by age group

Q3. Which of the following **age group** does your program serve?
Please check all that apply.

Yes

Infants: from birth to 17 months old

Toddlers: from 18 to 29 months old

Preschoolers: from 30 to 60 months old

School-age children: from 5 to 13 years old

Children with special needs (any age group)

Q4. For each **age group of children** that your program serves, please enter **the weekly tuition rates (\$)** for both full-time and part-time care.

Weekly Full-Time
Rate (\$)

Weekly Part-Time
Rate (\$)

Infants

Toddlers

Preschoolers

Weekly Full-Time
Rate (\$)

Weekly Part-Time
Rate (\$)

School-age children

Q5. For each **age group of children** that your program serves, please enter **the monthly tuition rates (\$)** for both full-time and part-time care.

Monthly Full-Time
Rate (\$)

Monthly Part-Time
Rate (\$)

Infants

Toddlers

Preschoolers

School-age children



Q6. If your program serves **children with special needs**, please enter **the weekly tuition rates (\$)** for both full-time and part-time care.

Weekly Full-Time
Rate (\$)

Weekly Part-Time
Rate (\$)

Infants

Weekly Full-Time
Rate (\$)

Weekly Part-Time
Rate (\$)

Toddlers

Preschoolers

School-age children

Q7. If your program serves **children with special needs**, please enter **the monthly tuition rates (\$)** for both full-time and part-time care.

Monthly Full-Time
Rate (\$)

Monthly Part-Time
Rate (\$)

Infants

Toddlers

Preschoolers

School-age children

Q8. Please enter your desired and current **enrollments** and the number of **classrooms** for each age group of children that your program serves.

Number of
classrooms

Desired enrollment

Current enrollment

Infants

Toddlers

Preschoolers

School-age
children

Q9. If your current enrollment is lower than the desired enrollment, what do you think are the reasons? Please choose all that apply.

- Low demand from families (fewer children or number of hours)
- Difficulty affording or hiring staff
- Loss of children to a public school due to preschool expansion
- Unsure
- Other (please briefly explain below)

Section 4: Extended and non-traditional care

Q10. What are your program's typical hours of operation? Please enter the starting and closing times as either A.M. or P.M.

| | A.M. | P.M. |
|---------------|----------------------|----------------------|
| Starting time | <input type="text"/> | <input type="text"/> |
| Closing time | <input type="text"/> | <input type="text"/> |

Q11. Which of the following **extended and non-traditional hours** of child care does your program provide? Please check all that apply.

- Early morning extended care
- Late afternoon or evening extended care
- Weekend care
- Overnight care
- Drop-in care

Q12. Please enter the **hourly rates (\$)** charged to families for each of the extended and non-traditional hours of child care that your program offers. Please respond to all that apply.

| | Hourly rates (\$) |
|-----------------------------|----------------------|
| Early morning extended care | <input type="text"/> |

Hourly rates (\$)

Late afternoon or evening extended care

Weekend care

Overnight care

Drop-in care

Q13. Which of the **before- and after-school care** does your program provide for **school-age children**?

- Before school care only
- After school care only
- Both before and after school care
- Neither

Q14. If your program offers before- and after-school care **for school-age children**, please enter the rates (\$) in all ways your program charges and the average monthly enrollment sizes. Please respond to all that apply.

| | Before-school care | After-school care | Both before- and after-school care |
|--------------------|----------------------|----------------------|------------------------------------|
| Weekly rate (\$) | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Monthly rate (\$) | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Average enrollment | <input type="text"/> | <input type="text"/> | <input type="text"/> |



Section 5: Other fees and discounts

Q15. If your program charges any of the following **fees**, please enter the amount (\$) and frequency of the fee collection (e.g., annually, incidentally). Please respond to all that apply.

| | Amount (\$) | Frequency |
|--------------------|----------------------|----------------------|
| Registration fee | <input type="text"/> | <input type="text"/> |
| Transportation fee | <input type="text"/> | <input type="text"/> |
| Late pick-up fee | <input type="text"/> | <input type="text"/> |
| Security deposit | <input type="text"/> | <input type="text"/> |
| Supply fee | <input type="text"/> | <input type="text"/> |

| | Amount (\$) | Frequency |
|---|----------------------|----------------------|
| Any other (please enter the fee name) <input type="text"/> | <input type="text"/> | <input type="text"/> |

Q16. If your program offers a **sibling or any other discount**, please enter the weekly amount (\$) and frequency (e.g., once, monthly).

| | Amount (\$) | Frequency |
|---|----------------------|----------------------|
| Sibling discount | <input type="text"/> | <input type="text"/> |
| Other discount (please specify below) <input type="text"/> | <input type="text"/> | <input type="text"/> |

Section 6: Other program features

Q17. Is your program **accredited**? If yes, please write down the name of the accrediting body (For example, NAEYC, NECPA, COA. Please note that the CCR&R is not an accrediting body).

- Yes
- No

Q18. Please enter the total number of staff (including yourself) and **the number of staff** with the following **educational credentials**.

| | Number |
|---|----------------------|
| Total number of staff | <input type="text"/> |
| Number of staff with Child Development Associate | <input type="text"/> |
| Number of staff with NJ Infant/Toddler credential | <input type="text"/> |
| Number of staff with an Associate degree | <input type="text"/> |
| Number of staff with a Bachelor's degree | <input type="text"/> |
| Number of staff with an advanced degree | <input type="text"/> |

Q19. Did your program receive any **state grants or assistance** related to the COVID-19 pandemic? Please check all that apply.

- NJ American Rescue Plan (ARP) Stabilization Grant (DHS/DFD)
- NJ \$1,000 Hiring and Retention Bonus Grant (DHS/DFD)

- Paycheck Protection Program assistance
- New Jersey Economic Development Authorities (NJEDA) Facilities Improvement Program Grant
- Small business loans
- Other (please specify below)
- None of the above

Q20. Which of the following **changes in tuition, staff, enrollment, and operation hours** did your program experience in the past year? Please check all that apply.

| | Increase | Decrease |
|---------------------------|-----------------------|-----------------------|
| Tuition | <input type="radio"/> | <input type="radio"/> |
| Number of staff | <input type="radio"/> | <input type="radio"/> |
| Enrollment size | <input type="radio"/> | <input type="radio"/> |
| Number of operation hours | <input type="radio"/> | <input type="radio"/> |
| Licensed capacity | <input type="radio"/> | <input type="radio"/> |

Q21. If your program increased tuition in the past year, what were the **reasons for the increase**? Please choose all that apply.

- COVID-related health and safety expenses

- Increased supply costs related to inflation
- Increased operational expenses
- Other (please briefly explain below)

Q22. Will you have spent all your NJ American Rescue Plan (ARP) Stabilization (DHS/DFD) Grant funding by December 31, 2023?

- Yes
- No

Q23. Which of the following changes to your program do you anticipate for this upcoming school year (September 2023)? Please check all that apply.

- No changes anticipated
- Have to raise tuition
- Have to cut staff wages
- Lose staff
- Serve fewer children
- Have to cut staff benefits
- Other (please add below)

Section 7: NJ Child Care Assistance Program questions

Q24. Does your program serve children who receive **state child care assistance**?

- Yes
- No

Q25. If your program's tuition rate is more than the state assistance program's reimbursement rates, do you charge the difference to families that participate in the assistance program?

- Yes
- No

Q26.

If your program does not serve children receiving state child care assistance, which of the following statements describes the reasons? Please check all that apply.

Yes

The reimbursement rate is less than the rate you charge privately paying families.

The assistance payment does not come through timely.

No family receiving the state child care assistance applied or the program has not received referrals.

You were unaware of the assistance program.

You are not interested in the assistance program.

Q27. If your program is not currently participating in the state child care assistance program, are you interested in participating?

Yes

No

Q28. The NJ Office of Child Care is required by the federal government to conduct a separate survey to collect information on the **costs of operating a child care program**. Would you be interested in participating in the survey? (Note that selected participants will receive an Amazon gift card at the end of the survey).

Yes



State of New Jersey

DEPARTMENT OF HUMAN SERVICES
DIVISION OF FAMILY DEVELOPMENT
PO BOX 716
TRENTON, NJ 08625-0716

Section 1: Cover Letter

2023 NJ Child Care Market Rate Survey

. Dear Family Child Care Provider:

The Office of Child Care within the Division of Family Development (DFD) of the NJ Department of Human Services is required by federal law to conduct a child care market rate survey.

The survey is designed to collect accurate, up-to-date child care rates that families pay for early education and care

services and to study how these rates vary by location, child age, and type of child care.

The data collected by this survey will inform policy and budget planning for the state's Child Care Assistance Program.

This survey is being emailed to all child care providers in New Jersey for their participation. Your participation is critical and necessary to ensure that the collected data adequately reflect all child care providers across the state.

Here are instructions about the survey:

- Please rest assured that your answers will remain completely confidential.
- You will have up to 28 questions, and it will likely take approximately 20 minutes to complete the survey.
- Please complete all the questions and submit your answers as soon as possible.

If you have any questions regarding this survey, please contact us at 609-631-2688 or DFD-MarketRateStudy@dhs.nj.gov.

Thank you in advance for your time and participation.

Division of Family Development
NJ Department of Human Services

Section 2: Identification

Q1. Please enter your program's contact information.

Program Name

Address

City

County

5-Digit Zip Code

Phone Number

Email

NJCCIS ID

Section 3: Rates by age group

Q2. Which of the following **age groups** does your program serve? Please check all that apply.

Yes

Infants: from birth to 17 months old

Toddlers: from 18 to 29 months old

Preschoolers: from 30 to 60 months old

School-age children: from 5 to 13 years old

Children with special needs (any age group)

Q3. What are the **minimum numbers** of weekly **days** and daily **hours** of child care that your program considers full-time and part-time?

| | Number of Days (per Week) | Number of Hours (per Day) |
|-----------|---------------------------|---------------------------|
| Full-Time | <input type="text"/> | <input type="text"/> |
| Part-Time | <input type="text"/> | <input type="text"/> |

Q4. For each **age group of children** your program serves, please enter **the daily tuition rates (\$)** for both full-time and part-time care.

| | Daily Full-Time Rate (\$) | Daily Part-Time Rate (\$) |
|---------------------|---------------------------|---------------------------|
| Infants | <input type="text"/> | <input type="text"/> |
| Toddlers | <input type="text"/> | <input type="text"/> |
| Preschoolers | <input type="text"/> | <input type="text"/> |
| School-age children | <input type="text"/> | <input type="text"/> |



Q5. For each **age group of children** your program serves, please enter **the weekly tuition rates (\$)** for both full-time and part-time care.

Weekly Full-Time
Rate (\$)

Weekly Part-Time
Rate (\$)

Infants

Toddlers

Preschoolers

School-age children



Q6. For each **age group of children** your program serves, please enter **the monthly tuition rates (\$)** for both full-time and part-time care.

Monthly Full-Time
Rate (\$)

Monthly Part-Time
Rate (\$)

Infants

Toddlers

Preschoolers

School-age children



Q7. If your program serves **children with special needs**, please enter **the daily tuition rates (\$)** for both full-time and part-time care.

Daily Full-Time Rate
(\$)

Daily Part-Time Rate
(\$)

Infants

Toddlers

Preschoolers

School-age children

Q8. If your program serves **children with special needs**, please enter **the weekly tuition rates (\$)** for both full-time and part-time care.

Weekly Full-Time
Rate (\$)

Weekly Part-Time
Rate (\$)

Infants

Toddlers

Preschoolers

School-age children

Q9. If your program serves **children with special needs**, please enter **the monthly tuition rates (\$)** for both full-time and part-time care.

Monthly Full-Time
Rate (\$)

Monthly Part-Time
Rate (\$)

Infants

Toddlers

Preschoolers

School-age children



Q10. Please enter your desired and current **enrollments** for each age group of children that your program serves.

Desired enrollment

Current enrollment

Infants

Toddlers

Preschoolers

School-age
children

Q11. If your current enrollment is lower than the desired enrollment, what do you think are the reasons? Please choose all that apply.

- Low demand from families (fewer children needing child care or number of hours)
- Difficulty affording or hiring staff
- Loss of children to a public school due to preschool expansion
- Unsure
- Other (please briefly explain below)

Section 4: Extended and non-traditional care

Q12. What are your program's typical hours of operation? Please enter the starting and closing times as either A.M. or P.M.

| | A.M. | P.M. |
|---------------|---|---|
| Starting time | <input style="width: 100%; height: 30px;" type="text"/> | <input style="width: 100%; height: 30px;" type="text"/> |
| Closing time | <input style="width: 100%; height: 30px;" type="text"/> | <input style="width: 100%; height: 30px;" type="text"/> |

Q13. Which of the following **extended and non-traditional hours** of child care does your program provide? Please check all that apply.

- Early morning extended care

- Late afternoon or evening extended care
- Weekend care
- Overnight care
- Drop-in care
- None of the above

Q14. Please enter **the rates (\$)** charged to families for each of the **extended and non-traditional hours** of child care that your program offers. Please respond to all that apply.

| | Hourly Rate (\$) | Daily Rate (\$) | Weekly Rate (\$) | Monthly Rate (\$) |
|---|----------------------|----------------------|----------------------|----------------------|
| Early morning extended care | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Late afternoon or evening extended care | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Weekend care | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Overnight care | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Drop-in care | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

Q15. Which of the **before- and after-school care** does your program provide for **school-age children**?

- Before school care only
- After school care only
- Both before and after school care
- None

Q16. If your program offers before- and after-school care **for school-age children**, please enter the rates (\$) in all ways your program charges and the average monthly enrollment sizes. Please respond to all that apply.

| | Before-school care | After-school care | Both before- and after-school care |
|--------------------|----------------------|----------------------|------------------------------------|
| Daily rate (\$) | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Weekly rate (\$) | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Monthly rate (\$) | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Average enrollment | <input type="text"/> | <input type="text"/> | <input type="text"/> |

Section 5: Other fees and discounts

Q17. If your program charges any of the following **fees**, please enter the amount (\$) and frequency of the fee collection (e.g., annually, per incident). Please respond to all that apply.

| | Amount (\$) | Frequency |
|--|----------------------|----------------------|
| Registration fee | <input type="text"/> | <input type="text"/> |
| Transportation fee | <input type="text"/> | <input type="text"/> |
| Late pick-up fee | <input type="text"/> | <input type="text"/> |
| Security deposit | <input type="text"/> | <input type="text"/> |
| Supply fee | <input type="text"/> | <input type="text"/> |
| Any other (please write down the fee name) | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | | |

Q18. If your program offers a **sibling or any other discount**, please enter the amount (\$) and frequency (e.g., once, monthly).

| | Amount (\$) | Frequency |
|------------------|----------------------|----------------------|
| Sibling discount | <input type="text"/> | <input type="text"/> |

| | Amount (\$) | Frequency |
|---------------------------------------|----------------------|----------------------|
| Other discount (please specify below) | | |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |

Section 6: Other program features

Q19. Please enter the total number of staff (including yourself) and **the number of staff** with the following **educational credentials**.

| | Number |
|---|----------------------|
| Total number of staff | <input type="text"/> |
| Number of staff with Child Development Associate (CDA) Credential | <input type="text"/> |
| Number of staff with NJ Infant/Toddler credential | <input type="text"/> |
| Number of staff with an Associate degree | <input type="text"/> |
| Number of staff with a Bachelor's degree | <input type="text"/> |
| Number of staff with an advanced degree | <input type="text"/> |

Q20. Did your program receive any **state grants or assistance**

related to the COVID-19 pandemic? Please check all that apply.

- NJ American Rescue Plan (ARP) Stabilization Grant (DHS/DFD)
- NJ \$1,000 Hiring and Retention Bonus grant (DHS/DFD)
- Small business loans
- Other (Please briefly specify below)
- None of the above

Q21. Which of the following **changes in tuition, enrollment, and operation hours** did your program experience in the past year?

| | Increase | Decrease | Stayed the same | Unsure |
|---------------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Tuition | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Enrollment size | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Number of operation hours | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Q22. If your program increased tuition in the past year, what were the **reasons for the increase**? Please choose all that apply.

- COVID-related health and safety expenses
- Increased supply costs related to inflation
- Increased operational expenses
- Other (please briefly explain below)

Q23. Which of the following changes to your program do you anticipate for this upcoming year (September 2023)? Please check all that apply.

- No changes anticipated
- Have to raise tuition
- Serve fewer children
- Other (please add below)

Section 7: NJ Child Care Assistance Program questions

Q24. Does your program currently serve children who receive **state child care assistance**?

- Yes
- No

Q25. If your program's tuition rate is more than the state assistance program's reimbursement rates, do you charge the difference to families that participate in the state assistance program?

- Yes
- No

Q26.

If your program does not currently serve children receiving state child care assistance, which of the following statements describes the reasons? Please check all that apply.

- | | Yes |
|--|--------------------------|
| The reimbursement rate is less than the rate you charge privately paying families. | <input type="checkbox"/> |
| The assistance payments do not come through in a timely fashion. | <input type="checkbox"/> |
| No family receiving state child care assistance applied to my program, or my program has not received referrals. | <input type="checkbox"/> |
| You were unaware of the assistance program. | <input type="checkbox"/> |

Yes

You are not interested in the assistance program.

Q27. If your program is not currently participating in the state Child Care Assistance Program, are you interested in participating?

- Yes
- No

Q28. The NJ Office of Child Care is required by the federal government to conduct a separate survey to collect information on **the costs of operating a family child care business**. Would you be interested in participating in the survey? (Note that selected participants will receive an Amazon gift card at the end of the survey).

- Yes
- No



State of New Jersey

DEPARTMENT OF HUMAN SERVICES
DIVISION OF FAMILY DEVELOPMENT
PO BOX 716
TRENTON, NJ 08625-0716

Section 1: Cover Letter

2023 NJ Child Care Market Rate Survey

. Dear Summer Youth Camp Director:

The Office of Child Care within the Division of Family Development (DFD) of the NJ Department of Human Services is required by federal law to conduct a child care market rate survey.

The survey is designed to collect accurate, up-to-date child care rates that families pay for early education and care

services and to study how these rates vary by location, child age, and type of child care.

The data collected by this survey will inform policy and budget planning for the state's Child Care Assistance Program.

This survey is being emailed to all child care providers in New Jersey for their participation. Your participation is critical and necessary to ensure that the collected data adequately reflect all child care providers across the state. Please rest assured that your answers will remain completely confidential.

Here are instructions to follow in filling out the survey:

- You will have up to 25 questions, and it will likely take approximately 15 minutes to complete the survey.
- If your camp/program operates in multiple site locations with different business names but shares the same email address, please fill out the survey for each site location so that we can collect geographically varying data.
- Please complete all the questions and submit your answers as soon as possible.

If you have any questions regarding this survey, please contact us at 609-631-2688 or DFD-MarketRateStudy@dhs.nj.gov
Thank you in advance for your time and participation.

Division of Family Development

NJ Department of Human Services

Section 2: Identification

Q1. Please enter your camp's contact information.

Program Name

Address

City

County

5-Digit Zip Code

Phone Number

Email

Camp ID

Q2.

Which of the following program types describe your camp?

Please check all that apply.

Yes

A residential (sleep away) camp

Day camp

Other (please specify below)

Section 3: Rates by age group

Q3. Which of the following **age groups** does your camp serve?

Please check all that apply.

Yes

Infants: from birth to 17 months old

Toddlers: from 18 to 29 months old

Preschoolers: from 30 to 60 months old

School-age children: from 5 to 13 years old

Yes

Q4. What are the **minimum numbers** of weekly **days** and daily **hours** of child care that your camp considers **full-time and part-time**?

| | Number of Days (per Week) | Number of Hours (per Day) |
|-----------|---------------------------|---------------------------|
| Full-Time | <input type="text"/> | <input type="text"/> |
| Part-Time | <input type="text"/> | <input type="text"/> |

Q5. For each **age group of children** your camp serves, please enter **the daily tuition rates (\$)** for both full-time and part-time care. Please respond to all that apply.

| | Daily Full-Time Rate (\$) | Daily Part-Time Rate (\$) |
|--------------|---------------------------|---------------------------|
| Infants | <input type="text"/> | <input type="text"/> |
| Toddlers | <input type="text"/> | <input type="text"/> |
| Preschoolers | <input type="text"/> | <input type="text"/> |

Daily Full-Time Rate
(\$)

Daily Part-Time Rate
(\$)

School-age children

Q6. For each **age group of children** your camp serves, please enter **the weekly tuition rates (\$)** for both full-time and part-time care. Please respond to all that apply.

Weekly Full-Time
Rate (\$)

Weekly Part-Time
Rate (\$)

Infants

Toddlers

Preschoolers

School-age children



Q7. For each **age group of children** your camp serves, please enter **the monthly tuition rates (\$)** for both full-time and part-time care. Please respond to all that apply.

Monthly Full-Time
Rate (\$)

Monthly Part-Time
Rate (\$)

Infants

| | Monthly Full-Time Rate (\$) | Monthly Part-Time Rate (\$) |
|---------------------|--------------------------------|--------------------------------|
| Toddlers | | |
| Preschoolers | | |
| School-age children | | |

Q8. Please enter your licensed slots and desired and current **enrollments** for each age group of children that your camp serves. Please respond to all that apply.

| | Maximum licensed slots | Current enrollment | Desired enr |
|------------------------|---------------------------|--------------------|-------------|
| Infants | | | |
| Toddlers | | | |
| Preschoolers | | | |
| School-age children | | | |



Q9. If your current enrollment is lower than the desired enrollment, what do you think are the reasons? Please choose all that apply.

- Low demand from families (fewer children needing child care and number of hours)
- Difficulty affording or hiring staff
- Loss of children to a public school due to preschool expansion
- Unsure
- Other (please briefly explain below)

Section 4: Extended and non-traditional care

Q10. What are your camp's typical hours of operation? Please enter the starting and closing times as either A.M. or P.M.

| | A.M. | P.M. |
|---------------|---|---|
| Starting time | <input style="width: 100%; height: 20px;" type="text"/> | <input style="width: 100%; height: 20px;" type="text"/> |
| Closing time | <input style="width: 100%; height: 20px;" type="text"/> | <input style="width: 100%; height: 20px;" type="text"/> |

Q11. Which of the following **extended hours** of child care does your camp provide? Please choose all that apply.

- Early morning extended care
- Late afternoon or evening extended care

None

Q12. Please enter **the rates (\$)** charged to families for the **extended hours** of child care that your camp offers. Please respond to all that apply.

| | Hourly Rate (\$) | Daily Rate (\$) | Weekly Rate (\$) | Monthly Rate (\$) |
|---|----------------------|----------------------|----------------------|----------------------|
| Early morning extended care | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Late afternoon or evening extended care | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

Section 5: Other fees and discounts

Q13. If your camp charges any of the following **fees**, please enter the amount (\$) and frequency of the fee collection (e.g., annually, per incident). Please all that apply.

| | Amount (\$) | Frequency |
|--------------------|----------------------|----------------------|
| Registration fee | <input type="text"/> | <input type="text"/> |
| Transportation fee | <input type="text"/> | <input type="text"/> |
| Late pick-up fee | <input type="text"/> | <input type="text"/> |

| | Amount (\$) | Frequency |
|---------------------------------------|----------------------|----------------------|
| Supply fee | <input type="text"/> | <input type="text"/> |
| Any other (please enter the fee name) | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |

Q14. If your camp offers a **sibling or any other discount**, please enter the amount (\$) and frequency (e.g., once, monthly).

| | Amount (\$) | Frequency |
|---------------------------------------|----------------------|----------------------|
| Sibling discount | <input type="text"/> | <input type="text"/> |
| Other discount (please specify below) | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |

Section 6: Other program features

Q15. Is your camp **accredited**? If yes, please enter the name of the accrediting body (e.g., American Camp Association).

- Yes
- No

Q16. Please enter the total number of staff (including yourself) and **the number of staff** with the following **educational credentials**.

Number

Total number of staff

Number of staff with Child Development Associate (CDA) Credential

Number of staff with NJ Infant/Toddler credential

Number of staff with an Associate degree

Number of staff with a Bachelor's degree

Number of staff with an advanced degree

Q17. Did your camp receive any **state grants or assistance** related to the COVID-19 pandemic? Please check all that apply.

- Paycheck Protection Program assistance
- Small business loans

- Other (please specify below)
- None of the above

Q18. Which of the following **changes in tuition, staff, enrollment, and operation hours** did your camp experience in the past year?

| | Increase | Decrease | Stayed the same | Unsure |
|---------------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Tuition | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Number of staff | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Enrollment size | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Number of operation hours | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Licensed capacity | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Q19. If your camp increased tuition in the past year, what were the **reasons for the increase**? Please choose all that apply.

- COVID-related health and safety expenses
- Increased supply costs related to inflation
- Increased operational expenses

Other (please briefly explain below)

Q20. Which of the following do you think will likely occur to your camp if the state's pandemic-era grants and assistance are discontinued? Please check all that apply.

No changes anticipated

Have to raise tuition

Have to cut staff wages

Lose staff

Serve fewer children

Have to cut staff benefits

Other (please add below)

Section 7: NJ Child Care Assistance Program questions

Q21. Does your camp currently serve children who receive **state child care assistance**?

Yes

No

Q22. If your camp charges families more than the state assistance program's reimbursement rates, do you charge the difference to families that participate in the assistance program?

- Yes
- No

Q23.

If your camp does not currently serve children receiving state child care assistance, which of the following statements describes the reasons? Please check all that apply.

Yes

The reimbursement rate is less than the rate you charge privately paying families.

The assistance payments do not come through in a timely fashion.

No family receiving the assistance applied to my program, or my program has not received referrals.

You were unaware of the assistance program.

Yes

You are not interested in the assistance program.

Q24. If your camp is not currently participating in the state Child Care Assistance Program, are you interested in participating?

- Yes
- No

Q25. The NJ Office of Child Care is required by the federal government to conduct a separate survey to collect information on **the cost of operating a child care program (including a summer camp)**. Would you be interested in participating in the survey? (Note that selected participants will receive an Amazon gift card at the end of the survey).

- Yes
- No