

Final Report

Maryland Child Care Market Rate June 2021 Market Rate Survey

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Executive Summary

Maryland State Department of Education (MSDE) as part of its Federal Child Care Block Grant requirements collected data on Maryland Child Care programs. MSDE requested Maryland Family Network (MFN) to analyze the collected data and provide MSDE with valuations for child care rates for center-based programs and family child care based programs, each at the 60th percentile, 75th percentile, 85th percentile, and 100th percentile. A total of 4,727 completed responses were received representing data from programs in each of the 24 jurisdictions in Maryland, 23 counties and Baltimore City. These valuations are presented in charts 9.1-4 and 10.1-4.

The following were key findings from the June 2021 Market Rate Survey results:

- Of the 4,727 completed responses received:
 - 3,077, or 65%, were from family child care;
 - 1,650, or 35%, were from child care centers;
 - 1156, or 25% were from family child care programs participating in the child care scholarship program;
 - 1088, or 23% were from child care center programs participating in the child care scholarship program;
 - 1723, or 40% reported having a registration fee.

- Average weekly full-time child care rates were reported as \$259.73 for children age birth - 23 months, \$223.25 for children ages 2 - 5 years, and \$119.53 for children of school age.
- On average, for each of the age ranges of children 1 – 23 months, 2 – 5 years, 5+ years, child care center fees were higher than those for family child care programs. This is a historical trend MFN has documented in Child Care Demographics, <https://www.marylandfamilynetwork.org/early-years-matter/2021-child-care-demographics>
- On average, weekly child care costs were found to be higher in the counties adjacent to Washington, D.C. and along the Interstate 95 and 270 Corridors, including Montgomery County, Howard County, Prince George’s County, Baltimore County, and Frederick County, in descending order.
- Of the 4,727 responses, 2,935 or 62% of all June 2021 Market Rate Survey responses were from programs that participate in Maryland EXCELS, Maryland’s Quality Rating and Improvement System (QRIS).

- In addition the Market Rate Survey, Vouchers from the Child Care Scholarship program were reviewed to determine that of 26,432 vouchers with a provider rate in 2021, 17,353, or 74% reported rates above the current Child Care Scholarship weekly reimbursement when compared to the Total Weekly Amount + Parent Copay

Introduction

Maryland is at the center of the Boston-Atlanta Corridor on the Atlantic seaboard, and borders Washington, D.C., the nation's capital. Among the 50 states Maryland ranks 42nd in size and 19th in population, with a diversified economy rooted in high technology, biosciences and services, as well as revitalized manufacturing and international trade. The state's private sector industries generate \$331.1 billion in economic output. Maryland is home to four Foreign-Trade Zones and 38 State Enterprise Zones, and transportation resources including the Port of Baltimore and the Baltimore/Washington International Thurgood Marshall Airport. Major federal facilities based in Maryland are the National Institutes of Health, National Institute of Standards and Technology, National Security Agency, Social Security Administration, Food and Drug Administration, Department of Homeland Security, and Census Bureau. Professional and technical workers constitute 27.8 percent of the state's work force – the second highest concentration among states. Further, Maryland ranks third among the states in educational attainment, with 39.7 percent holding a bachelor's degree or higher. Fifty-six accredited colleges and universities include 12 institutions in the University System of Maryland as well as the Johns Hopkins University. Maryland's 169,000 businesses employ nearly 2.2 million workers with an annual payroll of \$129 billion; 3,450 businesses have 100 or more workers. Significant companies headquartered in Maryland include Lockheed Martin, Marriott International, Host Hotels & Resorts, McCormick & Company, T. Rowe Price, Under Armour, W. R. Grace,

Legg Mason, GEICO, Emergent Biosolutions, United Therapeutics, Colfax, Tesco Technologies, BroadSoft, Coastal Sunbelt and Phillips Seafood. (Source: Maryland Department of Commerce, Brief Economic Facts, 2019/2.)

Child care is a necessity for the working families in Maryland. In 2018, 79% of Maryland children under the age of 12 had mothers in the workforce; this is mirrored by national trends as well. Given the high percentage of Maryland working parents, most children spend large amounts of time in the care of unrelated adults outside their homes. Maryland has some of the strictest licensing requirements in the country with providers serving at least one unrelated child required to be regulated. The majority of Maryland children from birth to age 5 are in licensed or registered child care settings.

Finding quality, affordable child care is a significant challenge to Maryland's low-income families. According to Child Care Aware of America's data, Maryland single parents pay 40.0% of their income for Child Care Center based infant care. Married parents of two children living at the poverty line would pay 123.0% of their household income for Child Care Center care. The annual cost of infant care in Maryland is more expensive than the annual cost of public in-state colleges or universities)

[https://www.marylandfamilynetwork.org/sites/default/files/2021-](https://www.marylandfamilynetwork.org/sites/default/files/2021-02/MFN_Trends_Feb2021%20%20FINAL_0.pdf)

[02/MFN Trends Feb2021%20%20FINAL_0.pdf](https://www.marylandfamilynetwork.org/sites/default/files/2021-02/MFN_Trends_Feb2021%20%20FINAL_0.pdf) . In all but one Maryland jurisdiction, the cost of child care ranks among the top three household expenses. According to MFN's Maryland Child Care Demographics, child care is the number one household expense in Allegany County, Baltimore City and Baltimore County and the number two household expense in Anne Arundel, Dorchester, Kent, Montgomery, Prince George's, Somerset, and Wicomico Counties. Child care is the number three household expense in Calvert, Caroline, Carroll, Cecil, Charles, Frederick, Harford, Howard, Queen Anne's, St. Mary's, Talbot, Washington and Worcester Counties. In Garrett County, child care is

the number four household expense. (Source:

<https://www.marylandfamilynetwork.org/early-years-matter/2021-child-care-demographics>).

According to The Center for American Progress, “When we talk about the price of child care and the significant burden it places on families, we are usually talking about what parents report paying for care or child care programs’ listed tuition rates. However, this does not necessarily represent the true cost of operating a child care program. Providers set rates based on the market and what parents can afford to pay. The real cost of child care is the actual expenses that providers incur to operate their program. The true cost of quality child care includes expenses to meet high-quality standards and to pay teachers higher salaries.” <https://www.thencit.org/sites/default/files/2019-03/Cost%20of%20Quality%20Toolkit.pdf>

Working parents at almost all income levels struggle to pay for child care, but relatively few are eligible for child care subsidies, and fewer still receive them. Most parents cannot afford to pay what it costs to provide high quality services, and publicly funded programs serve only a small portion of Maryland’s low-income children from birth - age 5.

Public pre-K programs serve 21,682 children age four or approximately 29.2% of the state’s four-year-olds, 1927 children age three were served or 2.6% of the state’s three year olds. (Population percentages are based on 2019 population estimates.

<https://datacenter.kidscount.org/data/tables/100-child-population-by-single-age?loc=22&loct=2#detailed/2/22/false/1729/43,44,45,46/418>)

Even with the public pre-K program, working parents still need to find before and after care during the “school year” and full-day child care during holidays and the summer. On average, 5% of four-

year-olds and 6% of three-year-olds are enrolled in Head Start, which is also most commonly a school-year-only program.

Many families would not be able to afford licensed/regulated child care without accessing the child care scholarship which is administered in Maryland through the Child Care Scholarship Program (CCSP). The CCSP provides financial assistance to assist with child care costs to eligible working families in Maryland. Families obtain information online, or through the postal mail, and can submit applications and supporting documentation electronically.

Federal Child Care Development Fund (CCDF) guidelines strongly recommend that states set provider reimbursement rates at the 75th percentile of the current market rate and parent co-payments at no more than 7% of household income. Five years ago, Maryland's reimbursement rates stood at the 10th percentile of the market rate, and parent co-payments averaged 12% of household income. Many providers simply cannot afford to provide child care at the 10th percentile of the market rate and must charge parents an additional fee to cover the difference between the provider reimbursement rate and the cost of tuition. The provider's full rate, however, is usually determined by what parents can afford to pay, and not by what it actually costs the provider to provide high quality child care. Private child care programs must find ways to operate with minimal budgets, paying staff low wages and offering them very limited benefits or no benefits at all.

These same low rates handicapped the ability of providers serving low-income communities to sustain their programs and improve quality, while creating strong

disincentives for providers in more affluent communities to enroll children receiving scholarship.

As detailed in the prior Market Rate June 2021 Market Rate Survey Report from MFN, the outlook for the child care scholarship began a significant positive trajectory that included legislation in 2018, which provided significant assistance to help low-income working families afford the high cost of child care. Most notably, the enrollment freeze in effect since 2011 was entirely eliminated, family eligibility for the program was dramatically expanded, and scholarship rates that formerly ranked among the very lowest in the country increased. In FY 2019, Governor Hogan raised provider reimbursement rates to the 20th percentile of the market rate, in FY 2020 to the 30th percentile and in FY 2021 to the current level of the 60th percentile. For the first time in more than a decade, advocates can point to a solid trajectory of investment and improvement, and a brighter future for the children, parents, and providers who participate in CCSP.

Until recently, Maryland's CCSP income eligibility ceiling hovered below 35% of the State Median Income (SMI). Effective August 1, 2018, family income eligibility for CCSP expanded dramatically, rising to 65% SMI. For a family of four, this raises the income-eligibility ceiling from \$35,702 to \$71,525.

Affordable, available child care for working parents is only one of the elements in understanding the critical need for child care. Research findings about the status of children in this country over the last two decades have resulted in a re-examination of national, state, and local investments in early care and education. Research on infant

brain development, studies of cost, quality, and child outcomes in programs serving young children, and analyses by noted economists demonstrating that investments in early childhood produce substantial returns on investments have all confirmed that the first years of life are critical to children's development and long-term well-being.

The years from birth to age 5 constitute the most expansive period of brain development and learning. Ninety-five percent of the volume of brain growth takes place before the age of six ([https://jaacap.org/article/S0890-8567\(09\)60063-0/fulltext](https://jaacap.org/article/S0890-8567(09)60063-0/fulltext)). During the years from birth to age 5, children develop the foundational capacities that will set the stage, either fragile or sturdy, for all later learning and functioning.

High-quality early childhood education pays dividends that last a lifetime, and those dividends accrue not just to individuals and families but to society as a whole. Overall, every dollar invested in high-quality early childhood education brings a return of approximately \$7. Put another way, one widely cited early childhood program yielded a 13% return on investment per child, per year, according to an analysis by Dr. James Heckman, a Nobel Laureate in Economics.

The State of Maryland is making great efforts to provide as much support as possible to Maryland's economically disadvantaged families. Without this support many families, including a significant number of single parents, would not be able to work, support their families, contribute to Maryland's economy, and help their children succeed in school and in life.

The next section of this report presents information on the methodology used for the Maryland 2021 Child Care Market Rate Survey, including an overview of the June 2021 Market Rate Survey participants and an analysis of the market rates for child care in Maryland.

June 2021 Market Rate Survey Design and Methodology

The Maryland State Department of Education instituted a form requiring child care programs that received funding from MSDE, e.g. Child Care Scholarship Program and other grant funded programs, to provide information that detailed fees charged for child care and other detail. This information was received online by MSDE. This practice was implemented beginning in the summer of 2020. A copy of that working form is available in the appendix of this document.

June 2021 Market Rate Survey respondents were asked to indicate: the name and location of the program; the type of program; their license number for Child Care Centers, or registration number for Family Child Care; current contact information; and, the weekly and monthly fees for their child care services. Additionally, for grant purposes additional information was solicited regarding use of funding for COVID-19 Pandemic Relief and an estimate of administrative costs, including but not limited to: rent, mortgage, salaries, utilities, food costs, supplies and materials.

Respondents were asked to supply child care fees according to age groups served, i.e. infant (birth through 11 months), toddler (12 - 23 months), two years old, three years old, four years old, five year olds, school age (5 years and older). For the purpose of data analysis and to conform to Maryland's Child Care Scholarship Program framework, these age groupings were collapsed to: infants, age birth - 23 months; preschool, age two years - five years of age; and, school age, age five years of age and older.

Respondents were given the option of reporting daily costs for before- and after-school care, non-traditional (7:00 PM – 6:00 AM) care and non-traditional (weekend) care.

Respondents were also asked if there were registration fees for child care. Program name, program address, and license or registration number were used to determine the jurisdiction and a specific question was added asking for the, “county where the child care program is located,” to insure that each program response was captured one time.

There are two general types of regulated child care in Maryland that are identified for this June 2021 Market Rate Survey report: family child care and child care centers.

Family child care is defined as a setting where care is given to a child younger than 13 years or to a person with a development disability younger than 21 years old, in place of parental care for less than 24 hours a day, in a residence other than the child’s residence and for which a provider is paid.

- Family child care is generally offered in the provider’s residence. Regulations allow a family child care provider to care for as many as eight children at any one time dependent on space, materials, equipment, and provider qualifications. There is an additional designation within this category called “large family child care homes,” which can care for more children, with additional requirements. Family child care is regulated by the Office of Child Care in DEC, MSDE.
- Center based child care is typically offered in a facility other than a residence, and the number of children in care depends on space, materials, equipment, staff qualifications, and related items. Child care centers include public child care programs and Letter of Compliance facilities and are regulated by the Office of Child Care in DEC, MSDE.

Letter of Compliance programs are child care programs operated by tax-exempt religious organizations in school buildings used exclusively for children who are enrolled in those schools, meet basic health, safety, space and other requirements.

More information on regulated child care in Maryland can be found at:

<https://earlychildhood.marylandpublicschools.org/child-care-providers/regulations.>

RESULTS

A total of 4,727 surveys were received, a 69.6% response rate. Response by type of care was 3,077 surveys from Family Child Care programs, 65% of all responses, and 1,650 surveys from Child Care Centers in Maryland, 35% of total responses.

Usable information was received from each of the 24 jurisdictions in Maryland. The response rate from Large Family Child Care and Letter of Compliance Programs was too low to compile reliable data to separately characterize the fees for those specific programs but that data was aggregated in the Family Child Care data and Center Care data.

Chart 1 identifies the number of total surveys by each of the 24 jurisdictions in Maryland, with three views of the response: the first column set contains totals for center based care the second column set contains totals for family child care; and the third column set contains totals combining both.

Chart 1: Combined Totals for Surveys Received

Jurisdiction/County	Center	Family	Jurisdiction Total
Allegany	12	33	45
Anne Arundel	139	232	371
Baltimore	248	382	630
Baltimore City	161	323	484
Calvert	31	53	84
Caroline	4	26	30
Carroll	59	40	99
Cecil	22	37	59
Charles	36	113	149
Dorchester	6	28	34
Frederick	82	208	290
Garrett	5	10	15
Harford	78	150	228
Howard	97	176	273
Kent	3	11	14
Montgomery	347	559	906
Prince George's	191	419	610
Queen Anne's	10	27	37
Somerset	3	12	15
St. Mary's	21	77	98
Talbot	13	19	32
Washington	42	77	119
Wicomico	28	52	80
Worcester	12	13	25
STATEWIDE TOTALS	1650	3077	4727

A total of 4,727 total forms were received, with the largest number of responses (in order) from Montgomery County, followed by Baltimore County, Prince George’s County and Baltimore City. Those jurisdictions also tend to be at the top half of more expensive areas for child care.

Finally, a short note about response from those in Maryland EXCELS. Maryland EXCELS has five levels of increasingly advanced quality levels providing a systematic

way to assess, improve, and communicate the level of quality in early care and education programs in Maryland to parents and the wider community. Of the 4,727 respondents to this survey, 2,403 or 50.8% of respondents, are identified as participating in Maryland EXCELS. Of that pool, 1298 or 54%, were Child Care Center based programs; 1105 or 46%, were Family Child Care. More information on participation in Maryland EXCELS can be found at:

<https://www.marylandexcels.org/resource/maryland-excels-participation-data/>.

Of the providers responding participate in the Maryland Child Care Scholarship program. This includes Family providers and Centers.

Background on the Concept of Percentile:

Chart 2 gives a simplified example of infant care fees for center-based care with highlights at the 60th percentile. An explanation of the concept of percentile follows.

The National Center on Scholarship Innovation and Accountability (NCSIA) brief, *Analyzing Your Market Rate June 2021 Market Rate Survey Data*, states:

The CCDF Final Rule at CFR 98.45(a) requires Lead Agencies to certify that their payment rates are sufficient to ensure equal access to child care services comparable to those provided to families not eligible to receive child care assistance under any federal, state, or tribal programs. Traditionally, a market rate June 2021 Market Rate Survey provides an easy comparison for what parents in the “priced market” pay for care. ACF considers payment rates set at the 75th percentile or higher as providing families receiving CCDF subsidies with access equal to that of families not receiving child care assistance.

In Maryland, where provider reimbursement rates for FY2021 are at the 60th percentile of the market rate, the 60th percentile refers to the number that separates the lower 60 percent of rates from the 40 percent that are the highest. To calculate market rate percentiles, the cost of care estimates based on the June 2021 Market Rate Survey needs to be listed in rank order from the lowest cost of care estimates to the highest cost of care estimates. For example, assume that 20 providers responded to the market rate survey. The 60th percentile would be the cost of care estimate at which 12 of the providers (60 percent x 20 providers = 12) reported charging for services. As an example, see the table below.

Chart 2: Percentile for Center- based Infant Care

Ranked (lowest to highest weekly cost)	Percentile	Weekly Cost
1	5.0%	110.00
2	10.0%	125.00
3	15.0%	135.00
4	20.0%	142.50
5	25.0%	150.00
6	30.0%	166.56
7	35.0%	195.00
8	40.0%	225.00
9	45.0%	250.00
10	50.0%	265.00
11	55.0%	285.00
12	60.0%	300.00
13	65.0%	320.00
14	70.0%	337.50
15	75.0%	354.00
16	80.0%	380.60
17	85.0%	404.70
18	90.0%	430.34
19	95.0%	478.00
20	100.0%	628.89

The data provided by the Maryland State Department of Education (MSDE) was provided to Maryland Family Network (MFN) to organize and analyze at the 60th percentile, 75th percentile, 85th percentile, and 100th percentile. That specific information is located later in charts 4, 5 and 9.1 to 10.4.

Statewide Child Care Rates

Chart 3 identifies the calculated weekly child care rate. As Maryland wanted confirmation of projections of rates at higher levels of reimbursement, MFN includes the valuations secured through the June 2021 Market Rate Survey in the projections derived from the survey.

Analysis of the June 2021 Market Rate Survey data suggested that the calculated full-time child care rates for both types of care in Maryland (Family Child Care, Child Care Centers) were:

1. \$259.73 per week for infants, birth - 23 months (a 9.15% increase from the previous June 2019 Market Rate Survey Report);
2. \$197.60 per week for preschooler children age 3 - 4 years (a 12.9% increase from the previous report); and
3. \$199.53 per week for school aged children age 5 years and older (a 15.3% increase (from the previous report).

Chart 3: 2021 Maryland Weekly Child Care Rates by Jurisdiction

2021 Average Weekly Cost of Care						
	0-23 mos. (infant)		2-4 yrs.		5+ yrs.	
County	Average Weekly Cost					
	FAM	CEN	FAM	CEN	FAM	CEN
Anne Arundel	\$ 254.10	\$ 375.73	\$ 214.17	\$ 263.62	\$ 187.03	\$ 241.89
Allegany	\$ 141.72	\$ 195.00	\$ 127.11	\$ 149.55	\$ 123.38	\$ 149.69
Baltimore	\$ 226.50	\$ 320.97	\$ 193.25	\$ 235.59	\$ 172.01	\$ 215.42
Baltimore City	\$ 197.01	\$ 290.49	\$ 166.23	\$ 222.41	\$ 146.37	\$ 201.93
Carroll	\$ 211.24	\$ 312.50	\$ 190.73	\$ 221.17	\$ 170.45	\$ 229.87
Cecil	\$ 178.98	\$ 277.50	\$ 159.24	\$ 211.14	\$ 144.61	\$ 198.70
Charles	\$ 232.67	\$ 303.86	\$ 193.12	\$ 227.07	\$ 163.86	\$ 198.35
Caroline	\$ 156.93	\$ 180.00	\$ 132.43	\$ 141.95	\$ 119.67	\$ 137.50
Calvert	\$ 217.80	\$ 272.23	\$ 176.91	\$ 190.69	\$ 160.33	\$ 183.92
Dorchester	\$ 149.24	\$ 156.25	\$ 128.77	\$ 152.28	\$ 124.27	\$ 148.00
Frederick	\$ 230.13	\$ 360.74	\$ 202.34	\$ 241.74	\$ 183.13	\$ 233.98
Garrett	\$ 129.38	\$ 168.33	\$ 114.79	\$ 145.00	\$ 114.72	\$ 143.33
Harford	\$ 221.43	\$ 357.50	\$ 195.45	\$ 257.13	\$ 178.95	\$ 237.08
Howard	\$ 279.77	\$ 416.57	\$ 247.78	\$ 309.61	\$ 222.43	\$ 283.80
Kent	\$ 168.93	\$ 246.17	\$ 147.59	\$ 204.11	\$ 132.22	\$ 181.93
Montgomery	\$ 305.72	\$ 446.80	\$ 278.06	\$ 390.52	\$ 254.05	\$ 317.82

**Chart 3: 2021 Maryland Weekly Child Care Rates by Jurisdiction
Continued**

COUNTY	0-23 mos. (infant)		2-4 yrs.		5+ yrs.	
	FAM	CEN	FAM	CEN	FAM	CEN
Prince George's	\$ 242.74	\$ 312.58	\$ 208.93	\$ 231.81	\$ 180.71	\$ 211.34
Queen Anne's	\$ 197.40	\$ 289.33	\$ 177.53	\$ 167.79	\$ 154.24	\$ 184.78
St. Mary's	\$ 203.69	\$ 285.50	\$ 174.10	\$ 205.65	\$ 152.05	\$ 185.83
Somerset	\$ 133.13	\$ 197.67	\$ 122.50	\$ 156.39	\$ 110.00	\$ 149.17
Talbot	\$ 171.25	\$ 246.53	\$ 137.50	\$ 161.58	\$ 127.08	\$ 147.44
Washington	\$ 162.65	\$ 253.88	\$ 145.67	\$ 160.36	\$ 131.84	\$ 149.21
Wicomico	\$ 166.10	\$ 237.00	\$ 134.19	\$ 171.21	\$ 123.24	\$ 151.90
Worcester	\$ 166.82	\$ 299.50	\$ 143.48	\$ 182.46	\$ 135.25	\$ 170.24
STATEWIDE	\$ 236.98	\$ 340.96	\$ 206.61	\$ 261.74	\$ 182.92	\$ 390.06

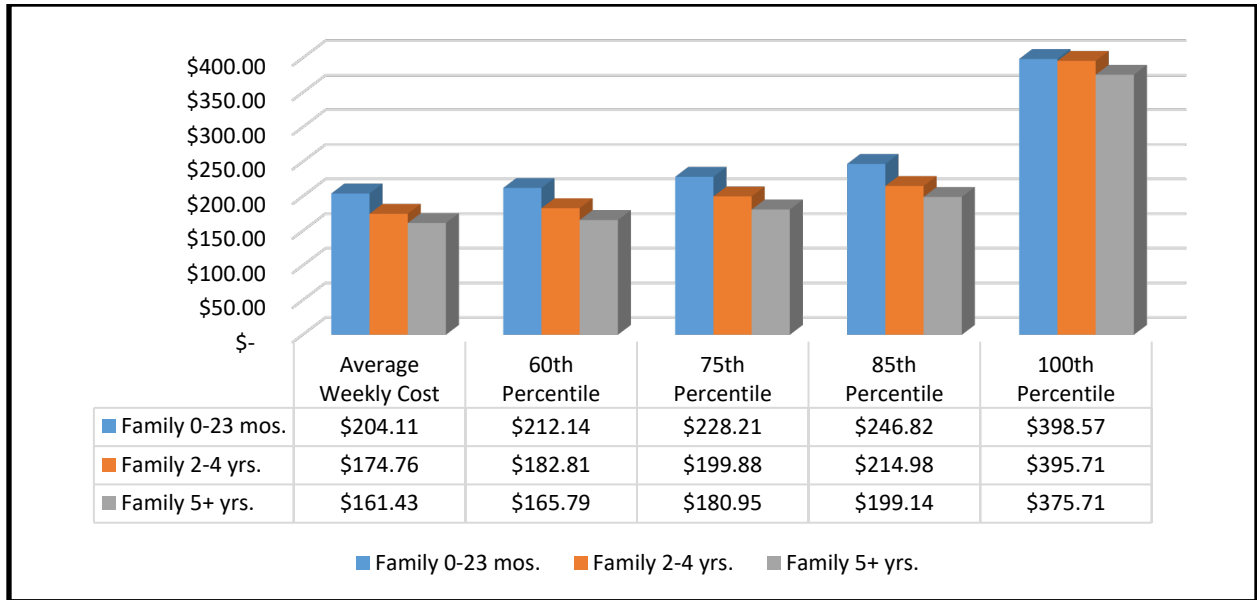
Using the average cost of infant care as an indicator, Montgomery County, adjacent to Washington, D.C., continues to be the most expensive jurisdiction for child care, followed in descending order by Howard County, Prince George's County, Baltimore County and Frederick Counties. Using the average cost of infant care as an indicator, the lowest cost of care is found in Garrett County, in Western Maryland, followed in ascending order by Dorchester, Somerset, Allegany and Caroline Counties.

Because child care costs reflect several factors, including socioeconomic variations in the state's population, competitive factors within the marketplace, the availability of child care in a particular region, the mix of child care programs in a particular region and other competitive forces within the marketplace, the availability and affordability of child care varies in each jurisdiction of the state. Those in the child care field are still gathering and analyzing data from the COVID-19 Pandemic that adversely impacted Maryland and the Nation beginning late- February 2020 and continuing to present time.

Child care programs participating in the Maryland June 2021 Market Rate Survey were grouped in two categories: family child care and child care centers. As is the typical pattern in most states and in Maryland, family child care rates tend to be less expensive than the rates in child care centers, for the same age child. That distinction can be seen in the charts on pages 21 to 33.

In Chart 4, the Maryland Weekly Full Time Child Care Rates by Age of Child for Family Child Care is displayed. The information is organized to include the average cost from the survey, and a projection of that average to valuations at requested percentiles; more detail is available in charts 9.1 – 4 later in this report.

Chart 4: Maryland Weekly Full Time Child Care Rates by Age of Child for Family Child Care



The average rates for family child care were: \$204.11 per week for infants, age birth – 23 months, \$174.76 per week for preschooler age children age 3 – 4 years, and, \$161.43 per week for school age children age 5 years and above.

In Chart 5, the Maryland Weekly Full Time Child Care Rates by Age of Child for Child Care Centers is displayed. The information is organized to include the average cost from the survey, and a projection of that average to valuations at requested percentiles; more detail is available in charts 10.1 – 4 later in this report.

Chart 5: Maryland Weekly Full Time Child Care Rates by Age of Child for Child Care Centers

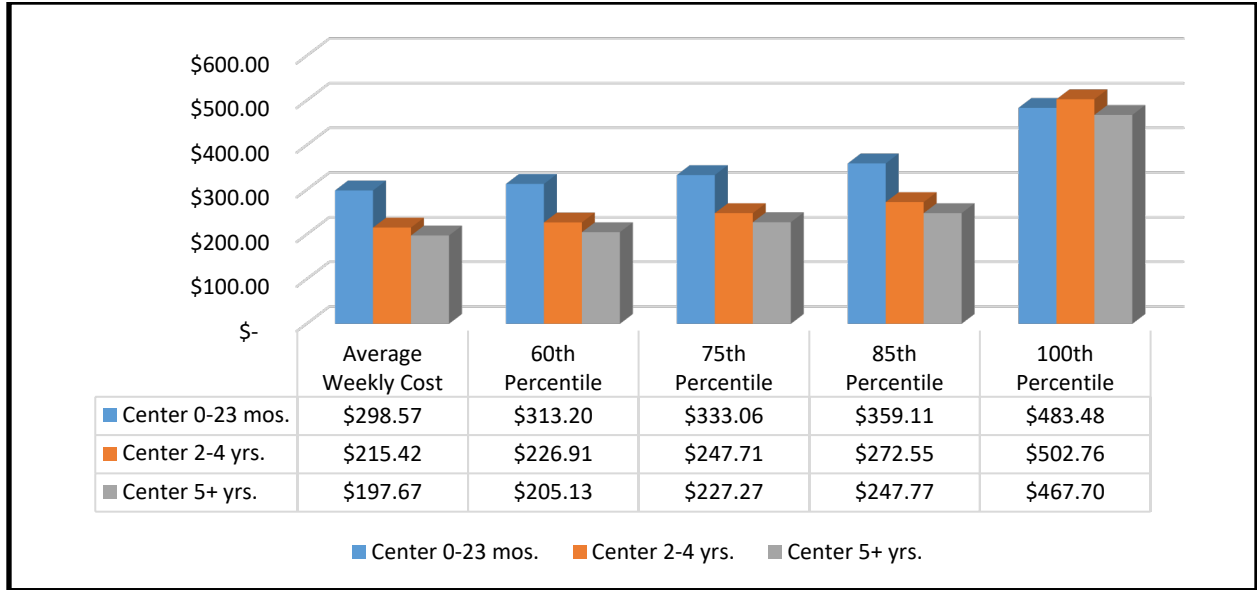


Chart 5 shows the average for Child Care Centers. Those rates were: \$298.57 per week for infants, age birth - 23 months, \$215.42 per week for preschooler age children age 2 - 5 years, and, \$197.67 per week for school age children age 5 years and above.

Detail of rates by each of the jurisdictions of the state by type of care are displayed in Charts 6 and 7.

**Chart 6: Family Child Care Average Weekly Full Time Rates by
Jurisdiction**

FAMILY	0-23 mos. (infant)		2-4 yrs.		5+ yrs.	
County	Average Weekly Cost					
	2021	2019	2021	2019	2021	2019
Anne Arundel	\$ 254.10	\$ 242.33	\$ 214.17	\$ 197.26	\$ 187.03	\$ 176.19
Allegany	\$ 141.72	\$ 125.33	\$ 127.11	\$ 114.00	\$ 123.38	\$ 113.67
Baltimore	\$ 226.50	\$ 199.98	\$ 193.25	\$ 175.03	\$ 172.01	\$ 151.84
Baltimore City	\$ 197.01	\$ 182.71	\$ 166.23	\$ 148.20	\$ 146.37	\$ 128.55
Carroll	\$ 211.24	\$ 210.38	\$ 190.73	\$ 177.44	\$ 170.45	\$ 160.38
Cecil	\$ 178.98	\$ 164.56	\$ 159.24	\$ 142.47	\$ 144.61	\$ 123.82
Charles	\$ 232.67	\$ 217.86	\$ 193.12	\$ 181.21	\$ 163.86	\$ 152.73
Caroline	\$ 156.93	\$ 133.75	\$ 132.43	\$ 112.98	\$ 119.67	\$ 97.32
Calvert	\$ 217.80	\$ 198.03	\$ 176.91	\$ 161.41	\$ 160.33	\$ 141.07
Dorchester	\$ 149.24	\$ 138.33	\$ 128.77	\$ 109.07	\$ 124.27	\$ 104.50
Frederick	\$ 230.13	\$ 219.10	\$ 202.34	\$ 187.27	\$ 183.13	\$ 168.49
Garrett	\$ 129.38	\$ 103.57	\$ 114.79	\$ 94.29	\$ 114.72	\$ 90.71
Harford	\$ 221.43	\$ 200.39	\$ 195.45	\$ 175.26	\$ 178.95	\$ 159.01
Howard	\$ 279.77	\$ 269.64	\$ 247.78	\$ 229.76	\$ 222.43	\$ 202.50
Kent	\$ 168.93	\$ 132.50	\$ 147.59	\$ 123.34	\$ 132.22	\$ 112.50
Montgomery	\$ 305.72	\$ 283.43	\$ 278.06	\$ 249.25	\$ 254.05	\$ 228.63
Prince George's	\$ 242.74	\$ 224.85	\$ 208.93	\$ 183.29	\$ 180.71	\$ 154.49
Queen Anne's	\$ 197.40	\$ 181.50	\$ 177.53	\$ 156.50	\$ 154.24	\$ 131.75
St. Mary's	\$ 203.69	\$ 188.44	\$ 174.10	\$ 156.85	\$ 152.05	\$ 135.59
Somerset	\$ 133.13	\$ 127.92	\$ 122.50	\$ 108.61	\$ 110.00	\$ 99.58

**Chart 6: Family Child Care Average Weekly Full Time Rates by
Jurisdiction Continued**

FAMILY	0-23 mos. (infant)		2-4 yrs.		5+ yrs.	
	2021	2019	2021	2019	2021	2019
Talbot	\$ 171.25	\$ 146.88	\$ 137.50	\$ 118.33	\$ 127.08	\$ 114.69
Washington	\$ 162.65	\$ 150.04	\$ 145.67	\$ 130.55	\$ 131.84	\$ 115.18
Wicomico	\$ 166.10	\$ 153.47	\$ 134.19	\$ 119.56	\$ 123.24	\$ 111.11
Worcester	\$ 166.82	\$ 153.33	\$ 143.48	\$ 138.33	\$ 135.25	\$ 133.00
STATEWIDE	\$ 236.98		\$ 206.61		\$ 182.92	

**Chart 7: Maryland Weekly Full Time Child Care Rates by Age
for Child Care Centers**

CENTER	0-23 mos. (infant)		2-4 yrs.		5+ yrs.	
County	Average Weekly Cost					
	2021	2019	2021	2019	2021	2019
Anne Arundel	\$ 375.73	\$ 360.76	\$ 263.62	\$ 257.27	\$ 241.89	\$ 228.87
Allegany	\$ 195.00	\$ 190.00	\$ 149.55	\$ 150.42	\$ 149.69	\$ 145.00
Baltimore	\$ 320.97	\$ 307.08	\$ 235.59	\$ 215.76	\$ 215.42	\$ 191.38
Baltimore City	\$ 290.49	\$ 266.92	\$ 222.41	\$ 189.36	\$ 201.93	\$ 160.18
Carroll	\$ 312.50	\$ 278.56	\$ 221.17	\$ 216.20	\$ 229.87	\$ 199.11
Cecil	\$ 277.50	\$ 227.50	\$ 211.14	\$ 167.71	\$ 198.70	\$ 156.14
Charles	\$ 303.86	\$ 278.56	\$ 227.07	\$ 201.29	\$ 198.35	\$ 154.56
Caroline	\$ 180.00	NR	\$ 141.95	\$ 131.25	\$ 137.50	\$ 130.00
Calvert	\$ 272.23	\$ 248.50	\$ 190.69	\$ 182.48	\$ 183.92	\$ 156.50
Dorchester	\$ 156.25	\$ 152.50	\$ 152.28	\$ 138.06	\$ 148.00	\$ 130.00
Frederick	\$ 360.74	\$ 343.07	\$ 241.74	\$ 241.05	\$ 233.98	\$ 210.91
Garrett	\$ 168.33	\$ 125.00	\$ 145.00	\$ 100.00	\$ 143.33	\$ 100.00
Harford	\$ 357.50	\$ 332.63	\$ 257.13	\$ 236.08	\$ 237.08	\$ 222.15
Howard	\$ 416.57	\$ 399.71	\$ 309.61	\$ 305.36	\$ 283.80	\$ 290.37
Kent	\$ 246.17	\$ 236.50	\$ 204.11	\$ 189.68	\$ 181.93	\$ 195.73
Montgomery	\$ 446.80	\$ 414.19	\$ 390.52	\$ 337.00	\$ 317.82	\$ 288.16
Prince George's	\$ 312.58	\$ 286.15	\$ 231.81	\$ 207.24	\$ 211.34	\$ 176.38
Queen Anne's	\$ 289.33	\$ 263.33	\$ 167.79	\$ 193.60	\$ 184.78	\$ 169.30
St. Mary's	\$ 285.50	\$ 238.60	\$ 205.65	\$ 183.55	\$ 185.83	\$ 148.70
Somerset	\$ 197.67	\$ 205.50	\$ 156.39	\$ 152.75	\$ 149.17	\$ 152.75
Talbot	\$ 246.53	\$ 245.50	\$ 161.58	\$ 158.35	\$ 147.44	\$ 141.40
Washington	\$ 253.88	\$ 208.64	\$ 160.36	\$ 158.91	\$ 149.21	\$ 138.17
Wicomico	\$ 237.00	\$ 210.83	\$ 171.21	\$ 158.44	\$ 151.90	\$ 137.06

**Chart 7: Maryland Weekly Full Time Child Care Rates by Age for Child
Care Centers Continued**

Worcester	\$ 299.50	\$ 233.33	\$ 182.46	\$ 161.17	\$ 170.24	\$ 128.88
STATEWIDE	\$ 340.96		\$ 261.74		\$ 390.06	

As shown in Charts 6 and 7, the data indicates that the rates between the two types of programs vary significantly. Chart 6 shows the average for Family Child Care by each of the 24 jurisdictions in Maryland, and compared to Chart 7, Child Care Center based care consistently continues to be more costly regardless of the region of the state and the age of the child.

Historically, the typical pattern in most states, including Maryland, shows that child care costs decline with the age of the child, with full-time weekly costs for school age children averaging about 77% of the costs for children identified as infants and toddlers.

Regional Child Care Rates

As established in the Code of Maryland Regulations (COMAR), Maryland has grouped jurisdictions similar in economic make-up into seven regions for the Child Care Scholarship Program. Those groupings by jurisdiction include:

Region U - Cecil, Queen Anne's, St. Mary's, Talbot, and Washington

Region V - Caroline, Dorchester, Kent, Somerset, and Wicomico

Region W - Anne Arundel, Calvert, Carroll, Charles, and Prince George's

Region X - Howard and Montgomery

Region Y - Baltimore County, Frederick, and Harford

Region Z - Allegany, Garrett, and Worcester

Region BC - Baltimore City

Chart 8 illustrates the average Child Care Scholarship rate by region for all types of care.

Chart 8: Maryland Weekly Full-Time Child Care Rates by Region Averaging Center and Family Child Care Rates.

Average Weekly Cost of Child Care Center Rates by Region

Region	0-23 mos. (infant)	2-4 yrs.	5+ yrs.
BC	\$ 221.17	\$ 184.54	\$ 164.51
U	\$ 196.80	\$ 166.25	\$ 150.80
V	\$ 170.80	\$ 141.19	\$ 129.80
W	\$ 260.43	\$ 214.89	\$ 191.93
X	\$ 329.63	\$ 301.79	\$ 270.23
Y	\$ 249.71	\$ 209.38	\$ 190.83
Z	\$ 165.90	\$ 139.65	\$ 134.68

Based on the charge from MSDE for the 2021 Market Rate Survey, Charts 9.1 – 9.4 document MSDE's request for cost of care at the 60th, 75th, 85th, and 100th percentiles for Family Child Care. That information follows.

Charts 9.1 - 9.5: Weekly Cost-of-Care Rates for Family Child

9.1 Care Providers by Age Group and Region

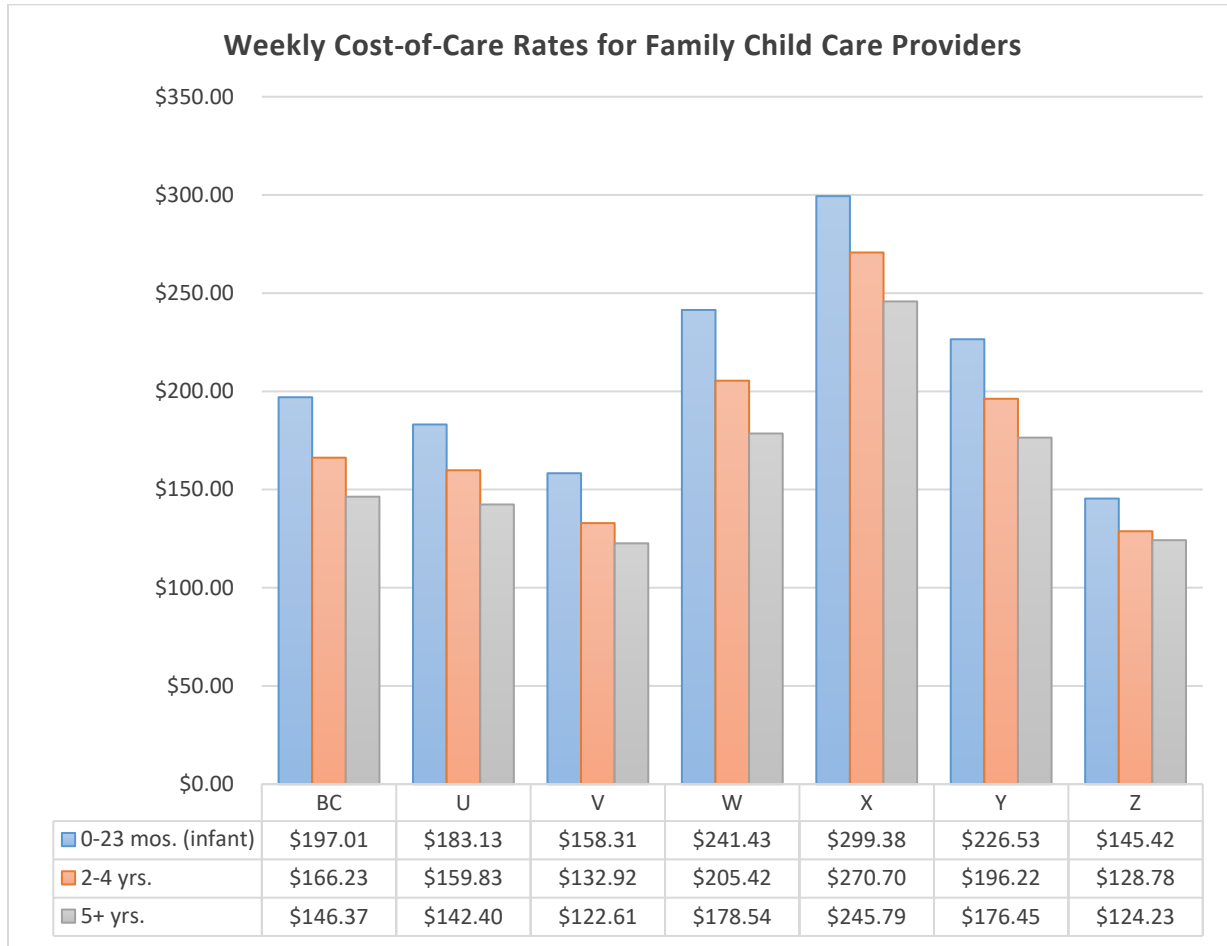


Chart 9.2: 60th Percentile (Family Child Care Providers)

Average Weekly Cost of Family Child Care Center Rates by Region (60th Percentile)

Region	County/City	0-23 mos. (infant)	2-4 yrs.	5+ yrs.
BC	Baltimore City	\$ 200.00	\$ 170.00	\$ 150.00
U	Cecil, Queen Anne's, St. Mary's, Talbot and Washington counties	\$ 190.00	\$ 160.00	\$ 149.50
V	Caroline, Dorchester, Kent, Somerset and Wicomico counties	\$ 160.00	\$ 135.00	\$ 125.00
W	Anne Arundel, Calvert, Carroll, Charles and Prince George's counties	\$ 250.00	\$ 205.00	\$ 181.00
X	Howard and Montgomery counties	\$ 300.00	\$ 280.00	\$ 250.00
Y	Baltimore, Frederick and Harford counties	\$ 235.00	\$ 200.00	\$ 180.00
Z	Allegany, Garrett and Worcester counties	\$ 150.00	\$ 129.67	\$ 125.00

Chart 9.3: 75th Percentile (Family Child Care Providers)

Average Weekly Cost of Family Child Care Center Rates by Region (75th Percentile)

Region	County/City	0-23 mos. (infant)	2-4 yrs.	5+ yrs.
BC	Baltimore City	\$ 210.00	\$ 181.67	\$ 165.00
U	Cecil, Queen Anne's, St. Mary's, Talbot and Washington counties	\$ 200.00	\$ 176.25	\$ 150.00
V	Caroline, Dorchester, Kent, Somerset and Wicomico counties	\$ 175.00	\$ 141.67	\$ 135.00
W	Anne Arundel, Calvert, Carroll, Charles and Prince George's counties	\$ 270.00	\$ 229.58	\$ 200.00
X	Howard and Montgomery counties	\$ 325.00	\$ 300.00	\$ 280.00
Y	Baltimore, Frederick and Harford counties	\$ 250.00	\$ 220.00	\$ 200.00
Z	Allegany, Garrett and Worcester counties	\$ 167.50	\$ 150.00	\$ 136.63

Chart 9.4: 85th Percentile (Family Child Care Providers)

Average Weekly Cost of Family Child Care Center Rates by Region (85th Percentile)

Region	County/City	0-23 mos. (infant)	2-4 yrs.	5+ yrs.
BC	Baltimore City	\$ 240.00	\$ 195.00	\$ 175.00
U	Cecil, Queen Anne's, St. Mary's, Talbot and Washington counties	\$ 215.00	\$ 190.83	\$ 173.25
V	Caroline, Dorchester, Kent, Somerset and Wicomico counties	\$ 187.75	\$ 154.00	\$ 150.00
W	Anne Arundel, Calvert, Carroll, Charles and Prince George's counties	\$ 290.00	\$ 250.00	\$ 220.75
X	Howard and Montgomery counties	\$ 350.00	\$ 325.00	\$ 300.00
Y	Baltimore, Frederick and Harford counties	\$ 270.00	\$ 240.00	\$ 225.00
Z	Allegany, Garrett and Worcester counties	\$ 175.00	\$ 150.00	\$ 150.00

Chart 9.5: 100th Percentile (Family Child Care Providers)

Average Weekly Cost of Family Child Care Center Rates by Region (100th Percentile)

Region	County/City	0-23 mos. (infant)	2-4 yrs.	5+ yrs.
BC	Baltimore City	\$ 380.00	\$ 345.00	\$ 345.00
U	Cecil, Queen Anne's, St. Mary's, Talbot and Washington counties	\$ 375.00	\$ 440.00	\$ 250.00
V	Caroline, Dorchester, Kent, Somerset and Wicomico counties	\$ 250.00	\$ 216.67	\$ 250.00
W	Anne Arundel, Calvert, Carroll, Charles and Prince George's counties	\$ 405.00	\$ 643.33	\$ 560.00
X	Howard and Montgomery counties	\$ 580.00	\$ 500.00	\$ 500.00
Y	Baltimore, Frederick and Harford counties	\$ 500.00	\$ 400.00	\$ 500.00
Z	Allegany, Garrett and Worcester counties	\$ 300.00	\$ 225.00	\$ 225.00

Based on the charge from MSDE for the June 2021 Market Rate Survey, Charts 10. 1 – 4 document MSDE's request for cost of care at the 60th, 75th, 85th, and 100th percentiles for Center based programs. That information follows.

Chart 10.1 – 10.4: Average Weekly Cost-of-Care Rates for Child Care Centers by Age Group and Region

Chart 10.1: 60th Percentile (Child Care Centers)

Average Cost of Care for Child Care Centers at the 60th Percentile

Region	County/City	0-23 mos. (infant)	2-4 yrs.	5+ yrs.
BC	Baltimore City	\$ 290.00	\$ 220.00	\$ 187.50
U	Cecil, Queen Anne's, St. Mary's, Talbot and Washington counties	\$ 281.40	\$ 185.00	\$ 175.00
V	Caroline, Dorchester, Kent, Somerset and Wicomico counties	\$ 232.00	\$ 166.67	\$ 150.00
W	Anne Arundel, Calvert, Carroll, Charles and Prince George's counties	\$ 339.00	\$ 241.67	\$ 230.00
X	Howard and Montgomery counties	\$ 450.00	\$ 350.00	\$ 302.42
Y	Baltimore, Frederick and Harford counties	\$ 350.00	\$ 250.00	\$ 233.45
Z	Allegany, Garrett and Worcester counties	\$ 250.00	\$ 175.00	\$ 157.50

Chart 10.2: 75th Percentile (Child Care Centers)

Average Cost of Care for Child Care Centers at the 75th Percentile

Region	County/City	0-23 mos. (infant)	2-4 yrs.	5+ yrs.
BC	Baltimore City	\$ 302.50	\$ 250.00	\$ 220.00
U	Cecil, Queen Anne's, St. Mary's, Talbot and Washington counties	\$ 296.12	\$ 205.00	\$ 188.86
V	Caroline, Dorchester, Kent, Somerset and Wicomico counties	\$ 242.33	\$ 175.42	\$ 158.13
W	Anne Arundel, Calvert, Carroll, Charles and Prince George's counties	\$ 370.00	\$ 261.67	\$ 250.00
X	Howard and Montgomery counties	\$ 480.75	\$ 380.67	\$ 346.13
Y	Baltimore, Frederick and Harford counties	\$ 377.50	\$ 278.33	\$ 252.82
Z	Allegany, Garrett and Worcester counties	\$ 262.25	\$ 182.92	\$ 175.00

Chart 10.3: 85th Percentile (Child Care Centers)

Average Cost of Care for Child Care Centers at the 85th Percentile

Region	County/City	0-23 mos. (infant)	2-4 yrs.	5+ yrs.
BC	Baltimore City	\$ 347.50	\$ 287.67	\$ 250.00
U	Cecil, Queen Anne's, St. Mary's, Talbot and Washington counties	\$ 303.80	\$ 231.66	\$ 215.00
V	Caroline, Dorchester, Kent, Somerset and Wicomico counties	\$ 250.00	\$ 181.67	\$ 168.75
W	Anne Arundel, Calvert, Carroll, Charles and Prince George's counties	\$ 413.05	\$ 294.00	\$ 269.39
X	Howard and Montgomery counties	\$ 519.75	\$ 414.30	\$ 381.30
Y	Baltimore, Frederick and Harford counties	\$ 400.75	\$ 301.06	\$ 274.96
Z	Allegany, Garrett and Worcester counties	\$ 278.95	\$ 197.50	\$ 175.00

100th Percentile (Child Care Centers)

Average Cost of Care for Child Care Centers at the 100th Percentile

Region	County/City	0-23 mos. (infant)	2-4 yrs.	5+ yrs.
BC	Baltimore City	\$ 530.50	\$ 475.30	\$ 370.00
U	Cecil, Queen Anne's, St. Mary's, Talbot and Washington counties	\$ 459.50	\$ 318.33	\$ 300.00
V	Caroline, Dorchester, Kent, Somerset and Wicomico counties	\$ 350.00	\$ 316.67	\$ 250.00
W	Anne Arundel, Calvert, Carroll, Charles and Prince George's counties	\$ 499.00	\$ 625.00	\$ 625.00
X	Howard and Montgomery counties	\$ 628.89	\$ 770.00	\$ 770.00
Y	Baltimore, Frederick and Harford counties	\$ 503.00	\$ 790.00	\$ 740.00
Z	Allegany, Garrett and Worcester counties	\$ 413.50	\$ 224.00	\$ 218.90

Brief Summary

This report presents the findings of the June 2021 Maryland Market Rate Survey (MRS) conducted by the Division of Early Childhood of the Maryland State Department of Education (DEC/MSDE) and the analysis of that data by Maryland Family Network. The MRS was designed to collect information on child care rates in Maryland in order to determine child care scholarship rates for child care cost reimbursement. All regulated child care providers in Maryland were targeted for this effort.

There were sufficient responses from all programs in Maryland to conduct an analysis; 4,727 responses were received including 3,077 from family child care providers and 1,650 from child care centers, to provide analysis for MSDE to calculate revised child

care reimbursement rates for Maryland Child Care Programs for State Fiscal Year (SFY) 2022, 1 July 2021 through 30 June 2022.

As requested by MSDE, MFN is providing information for center based care and family child care, by Child Care Scholarship pre-determined regions and at the 60th, 75th, 85th and 100th percentile.

APPENDIX

2021 Child Care Relief Funds Grant WORKSHEET

To make the grant application process easier, please use this worksheet to gather your information before completing the on-line grant application. Do not submit this WORKSHEET. Only submissions completed using the on-line form will be accepted.

1. Name of Family Child Care Provider or Center

2. License Number

3. Provider I.D. Number

4. Type of Program (check one)

- Family Child Care Home
- Large Family Child Care Home
- Child Care Center
- Letter of Compliance

5. Family Child Care Provider or Center **Physical Address**

6. County Where the Child Care Program is Located

7. Family Child Care Provider or Center **Mailing Address** for payments

8. **Number of Licensed Slots** - Enter the number of slots, by age group, for which you are licensed.

Birth to 24 months _____

2 years through 4 years _____

5 years and older _____

9. **Number of Children Enrolled** – Enter the number of children, by age group, who are enrolled in your program as of February 1, 2021.

Birth to 24 months _____
2 years through 4 years _____
5 years and older _____

10. **Children no Longer Attending** - Enter the number of vacancies, by age group, of children who are no longer attending your program as of February 1, 2021.

Birth to 24 months _____
2 years through 4 years _____
5 years and older _____

11. Number of days closed due to COVID-19 from June 28, 2020 to January 31, 2021

_____ days

12. Are you providing full-time care to school-age students attending your facility and participating in virtual learning? Yes ___ No ___

How many school-age students? _____

13. How many kindergarten-age students are you serving to fulfill their compulsory education requirement? _____

14. **TUITION RATES:** Please complete the following information for each age group served. Do not include any discounts applied based on family size or income. If you charge monthly rates, divide the monthly tuition by 4.333 to determine the weekly rate. Select Not Applicable if you do not serve that age or do not collect tuition for that defined age group.

a. Infant (Birth-18mo)

i. Regular Full Time Weekly Rate _____ per week

ii. Daily _____ per day

iii. Non-Traditional (7pm – 6am) _____ per week

iv. Non-Traditional (Weekend) _____ per weekend

b. Toddler (18mo-24mo)

i. Regular Full Time Weekly Rate _____ per week

ii. Daily _____ per day

iii. Non-Traditional (7pm – 6am) _____ per week

iv. Non-Traditional (Weekend) _____ per weekend

c. 2 year olds

i. Regular Full Time Weekly Rate _____ per week

ii. Daily _____ per day

iii. Non-Traditional (7pm – 6am) _____ per week

iv. Non-Traditional (Weekend) _____ per weekend

- d. 3 year olds
 - i. Regular Full Time Weekly Rate _____ per week
 - ii. Daily _____ per day
 - iii. Non-Traditional (7pm – 6am) _____ per week
 - iv. Non-Traditional (Weekend) _____ per weekend
- e. 4 year olds
 - i. Regular Full Time Weekly Rate _____ per week
 - ii. Daily _____ per day
 - iii. Non-Traditional (7pm – 6am) _____ per week
 - iv. Non-Traditional (Weekend) _____ per weekend
 - v. Before/After School Weekly Rate _____ per week
- f. 5 year olds
 - i. Regular Full Time Weekly Rate _____ per week
 - ii. Daily _____ per day
 - iii. Non-Traditional (7pm – 6am) _____ per week
 - iv. Non-Traditional (Weekend) _____ per weekend
 - v. Before/After School Weekly Rate _____ per week
- g. School-Age (5+)
 - i. Regular Full Time Weekly Rate _____ per week
 - ii. Daily _____ per day
 - iii. Non-Traditional (7pm – 6am) _____ per week
 - iv. Non-Traditional (Weekend) _____ per weekend
 - v. Before/After School Weekly Rate _____ per week

15. **REGISTRATION FEE** (if any): \$ _____

- a. Registration is Assessed:
 - Per Child **OR**
 - Per Family
- b. Registration Fee is collected
 - Annually **OR**
 - One Time

16. Please specify the purpose for which COVID-19 Pandemic Relief Grant funds will be used by selecting one or more of the allowable uses of funds:

- a. Costs of decreased enrollment
- b. Costs of reduced capacity limits due to state or local restrictions
- c. Costs of temporary closures related to coronavirus
- d. Fixed costs
- e. Increased operating expenses
- f. Cleaning and sanitation
- g. Personal Protective Equipment or PPE
- h. Increased salaries or wages for staff

17. Administrative Costs - Please enter the monthly administrative costs of running your facility.

- a. Rent \$ _____
- b. Mortgage and Property Taxes \$ _____
- c. Salaries \$ _____
- d. Utilities \$ _____
- e. Food Costs \$ _____
- f. Supplies and Materials \$ _____
- g. Other (please specify) \$ _____
- h. TOTAL \$ _____

18. By checking this box, I agree to use grant funds as indicated.

19. By checking this box, I agree to report on grant expenditures and other data requested by MSDE by May 1, 2021.

20. By checking this box, I agree to provide receipts or other documentation if randomly selected for an audit.

21. By checking this box, I agree to remain open at least until June 30, 2021 or return all funds received.

**DO NOT SEND THIS TO MSDE
THIS IS A WORKSHEET TO ASSIST WITH COMPLETING THE ON-LINE
APPLICATION
ALL GRANT APPLICATIONS MUST BE COMPLETED ON-LINE**