

Final Report for the 2024 Child Care Market Price Analysis

September 2024





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Cantonese (Traditional Chinese)

wáŋ. héčínhan niyé wačhínŋAŋ wayúiyeska ki de wówapi sutá, ečiyA kiŋ wóiyawa ed ophiye waŋ. Dakota

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સાવધાન. જો તમને આ દસ્તાવેજને સમજવા માટે નિ:શુલ્ક મદદની જરૂર હોય, તો ઉપરના બોક્સ પૈકીના નંબર પર કોલ કરો. Gujarati

ध्यान दें। यदि आपको इस दस्तावेज़ की व्याख्या में निशुल्क सहायता की आवश्यकता है, तो ऊपर बॉक्स में दिए गए नंबर पर कॉल करें। Hindi

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Lus Ceeb Toom. Yog tias koj xav tau kev pab txhais lus dawb ntawm cov ntaub ntawv no, ces hu rau tus nab npawb xov tooj nyob hauv lub npov plaub fab saum toj no. Hmong

ဟ်သ့ဟ်သး. နမ့ၢ်လိၣ်ဘၣ် တၢ်မၤစၢၤကလီၤလၢ ကကျိးထံလံာ်တီၤလံာ်မိတဖၣ်အဃိ, ကိးနီၣ်ဂံၢ်လၢ အအိၣ်ဖဲတၢ်လွံၢ်နၢၣ် လၢတၢ်ဖီၣ်ခိၣ်အပူၤတက့ၢ်. Karen

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تکایه سهرنج بده. ئەگەر بۆ وەرگیرانی ئەم بەلگەنامەیە پێویستت بە یارمەتی بێبەر امبەرە، ئەو پەڕه‌ندی به‌و ژماره‌یه‌وه بکه که له بۆکسه‌که‌ی سهره‌ودایه. Kurdish Sorani

Baldarî. Ger ji bo wergerandina vê belgeyê hewcedariya we bi alîkariya belaş hebe, ji kerema xwe bi hejmara li qutiya jorîn re telefon bikin. Kurdish Kurmanji

Hoŋpín. Tóhán wanǵí thí wíyukčanpi kin yuhá níyunspe héčha čhéya, lé tkíčhun kin k'é nánpa opáwinyan. Lakota

ເອົາໃຈໃສ່. ຖ້າທ່ານຕ້ອງການຄວາມຊ່ວຍເຫຼືອພຣີໃນການຕີຄວາມເອກະສານນີ້, ໃຫ້ໃບຫາເບີທີ່ຢູ່ໃນບ່ອງຂ້າງເທິງ. Lao

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Mandarin (Simplified Chinese)

Paɬɛ ɾɔ piny: Mi gööri luäk lɔrä ke luɔɔ kä memɛ, yɔtni nämbär emɔ tää nhial guäth emɛ. Nuer

Mah Biz'sin'dan.
Keesh'pin nan'deh'dam'mun chi'wee'chi'goo'yan chi'nis'too'ta'man oo'weh ooshii'be'kan.
Ishi'kidoon ah'kin'das'soon ka'ooshi'bee'kadehk ish'peh'mik ka'shi ka'ka'kak. Ojibwe

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Àkíyèsí. Tí o bá nílò ìrànlówọ pẹ̀lú tí tú mọ̀ àkòólẹ̀ yìí, pe nọmbà tó wà nínú àpótí tí wà ló kẹ̀. Yoruba

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CHAPTER

1



Executive summary

The Minnesota Department of Children, Youth and Families (department), Child Care Services Division, conducts a periodic analysis of prices charged by licensed center-based and family child care providers to meet state and federal requirements. The 2024 Minnesota Child Care Market Price Analysis was based on data collected by Child Care Aware of Minnesota, the state's child care resource and referral system, through updates to an online provider portal, paper surveys, and by phone from October 2023 through February 2024. A contracted vendor, ICF's Early Childhood Insights and Survey Research team (research team), prepared the analysis. The analysis used a methodology developed by the research team in conjunction with department staff. The analysis was based on responses from 1,358 center-based providers and 3,693 family child care providers, representing 64% of all providers contacted. The research team also examined changes to provider pricing and capacity between 2021 and 2024.

Although the 2024 Minnesota Child Care Market Price Analysis allows department staff to compare child care reimbursement rates to prices that providers charge parents in the private market, analyzing prices alone does not provide an accurate picture of the true cost of providing care. In 2023, the department published results of a cost model analysis to augment the 2021 price analysis. This cost model analysis produced cost estimates for different types of care, age groups, quality levels, and geographic regions. A summary of findings is included in this report. The cost analysis will be updated to augment the 2024 price analysis.



Key findings

Key findings of the child care analysis include:

- A comparison of Child Care Assistance Program reimbursement rates (effective Oct. 30, 2023, based on 2021 price data) and current market prices for child care centers finds that approximately 83% of reimbursement rates examined are below 2024's 75th market price percentile, 69% are below the 50th percentile, and 41% are below the 25th percentile. This represents an improvement in access to the market compared to findings in the 2021 Child Care Market Price Analysis.
- A comparison of department reimbursement rates (effective Oct. 30, 2023, based on 2021 price data) and current market prices for family child care providers finds that approximately 87% of reimbursement rates examined are below 2024's 75th market price percentile, 35% are below the 50th percentile, and 15% are below the 25th percentile. This represents an improvement compared to findings in the 2021 Child Care Market Price Analysis.
- A comparison of provider prices and differential reimbursement rates the department pays to providers that meet higher quality standards (providers with Three- and Four-Star Parent Aware ratings, those that are accredited, or have specific credentials) finds that most differential rates are equal to or more than prices that providers charge. This represents a significant improvement over findings in the 2021 Market Price Analysis.

CHAPTER 2



Background on the market price analysis

From 1998 to April 2024, the federal Administration for Children and Families required states to conduct a study of child care market prices to evaluate adequacy of state reimbursement rates for the purpose of demonstrating equal access to child care for low-income families. Now, the federal Administration for Children and Families requires states to conduct a narrow cost study, and states may choose to use an alternative methodology to set reimbursement rates in lieu of a market rate survey. Many states continue to use the results of market price surveys and narrow cost studies, while some states now use alternative methodologies, to inform rate-setting policy and to establish maximum reimbursement rates for children served through child care assistance programs. The federal requirement encourages states to establish child care payment rates that are high enough to enable families receiving child care assistance to find and afford care.

Historically, the Administration for Children and Families has encouraged states to use market price survey findings to inform setting maximum reimbursement rates for child care subsidies. Federal Child Care and Development Fund regulations state that maximum rates established at least at the 75th percentile are regarded as providing equal access. At this percentile, states' reimbursement rates would be equal to, or exceed, prices charged by providers for three-quarters of child care slots. As described in the preamble to the final rule ([89 FR 15366](#)), the 75th percentile payment rate is viewed as a proxy for equal access. However, a recent report by the National Women's Law Center found that only one state was reported to set reimbursement rates at the 75th percentile. [Schulman, 2021] When making state-to-state comparisons for this benchmark, it should be noted that each state uses different definitions and methodologies to conduct surveys, and each state differs significantly in how it balances policy priorities for quality, access, and affordability.

A 2008 report funded by the Administration for Children and Families, *Study of Market Prices: Validating Child Care Market Rate Surveys*, provides the main source of guidance on conducting valid child care market price surveys. [Grobe et al., 2008] States also received additional guidance on conducting market price surveys and alternative cost-based methodologies in a 2017 report produced by the Administration for Children and Families. [Davis et al., 2017] The 2024 Child Care Market Price Analysis was conducted using recommended practices included in the Administration for Children and Families reports and Child Care and Development Fund program guidance.

Department staff engaged with key community partners about data collection efforts. Community partners included representatives from Minnesota’s Early Learning Council, child care provider professional associations, and center and family child care providers statewide. Discussions focused on explaining the survey, data analysis, and how analysis results would be used, while answering questions and gathering feedback. As a result, department staff worked with Child Care Aware of Minnesota to improve survey delivery methods and marketing efforts.

This report provides an overview of the methodology used to conduct the analysis, results of the market price analysis, key findings from a prior narrow cost model analysis, and a summary of policy considerations.

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CHAPTER 3



Overview of methodology

Survey population

The 2024 Minnesota Child Care Market Price Analysis population includes licensed child care providers. Although many states only sample a portion of the population when preparing a child care market price analysis, the business update makes it feasible to conduct a census with high response rates, producing accurate results. As shown in Table 1, the sample frame included 7,893 providers, including 1,815 center-based providers and 6,078 family child care homes. The sample frame excluded providers no longer in business, not accepting children from the public, and part-time preschool providers. In summary, 5,051 providers responded, including 1,358 center-based providers and 3,693 family child care providers. The overall response rate was 64% (75% for center-based providers and 60% for family child care providers). Data analysis of these responses represents the provider population distribution across counties within the state.

Table 1: Survey population by provider type

Description	Center-based providers	Family child care homes	Total
Survey population	1,815	6,078	7,893
Responses received	1,358	3,693	5,051
Response rate	75%	60%	64%

Data collection

Child Care Aware of Minnesota conducted the child care Provider Business Update between October 2023 and February 2024. Providers were instructed to complete the Update based on how they typically operate their program. During these updates, providers had the option to enter their price data into an online child care provider portal, provide the price data during phone interviews, or complete paper surveys. Typically, up to three contact attempts were made by phone to providers who did not enter data in the portal or return completed paper surveys. After completing data collection, Child Care Aware of Minnesota provided the research team with a file export to use for conducting the 2024

Minnesota Child Care Market Price Analysis. The file export included basic demographic, business practices, capacity, and price data for each provider.

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Data analysis

Cluster methodology

Department staff established the methodology used for the market price analysis in 2009 in partnership with the research team, with recommendations based on an *Alternative Methods* study. [Davis et al., 2009] The department conducted significant partner engagement to provide input into design of the methodology, which organizes counties with similar price distributions into price clusters based on the 50th percentile of market prices reported for each county. Since child care prices vary significantly depending on care setting and age of child, the 50th percentile ceilings are calculated for different types of providers, age groups, and price modes for each rate cluster, including:

- Type of provider — licensed child care center or licensed family child care home
- Age of child — infant, toddler, preschool, or school age
- Price modes — hourly, daily, and weekly rates.

The analysis places each county into one of four price clusters for each type of provider. Cluster assignments are updated each time the study is conducted; counties may be reassigned to different clusters as price data change over time.

Reviewing data inconsistencies and outliers

After receiving the file export from Child Care Aware of Minnesota, the research team converted the file into an SAS format for analysis and examined the files for data inconsistencies and outliers. A provider's record could be flagged as inconsistent or an outlier if data on prices, hours of operation, or capacity fell outside of acceptable boundaries. Child Care Aware of Minnesota contacted providers whose records were flagged to determine whether edits to the data were needed. After receiving edits, the research team revised datasets and excluded any remaining outliers.

Weighting of data by desired capacity

For center-based providers, the research team weighted each provider's price by their capacity to represent varying sizes of providers more accurately. When available, the minimum of a provider's desired capacity and licensed capacity was used as the weighting factor because it represents the true capacity of a provider. For instances where data on desired capacity were unavailable, the licensed capacity was used as the weighting factor. The prices for family child care providers were not weighted, because these providers typically have the same licensed capacity.



Percentile calculations and cluster assignments

The research team computed 50th percentile estimates for prices by county, provider, and rate types. The 50th percentile estimates were standardized to a normal distribution with a mean of zero and a standard deviation of one by provider and rate types. For each provider type, researchers computed the mean of standardized rates by county and entered the means in a price clustering algorithm modeled after Fisher's Method of Exact Optimization. For each type of care, the algorithm assigned counties with similar price distributions to one of four price clusters.

Researchers calculated the 25th, 30th, 40th, 50th, and 75th percentile price estimates for each price mode (hourly, daily, weekly), age group (infant, toddler, preschool, school age), and type of care in each of the four price clusters. The calculations for the 25th, 50th, and 75th percentile price estimates are shown in Table 2 for center-based providers and Table 3 for family child care providers. A complete set of percentile calculations, including the 30th and 40th percentile price estimates, are included in Appendix A for licensed center-based providers and Appendix B for licensed family child care providers. The cluster assignments (pre-smoothing/ assignment of counties with no providers for both center-based and family child care providers) are shown in Table 4 and the maps in Figures 1 and 2.

Supplemental survey of certified school-age providers

In addition to the Provider Business Update, research team staff conducted a survey of certified school-age child care providers in the state in March 2024. Historically, these providers have not been included in the market price analysis, as it only includes licensed child care programs. To learn more about certified school-age providers, research team staff conducted a survey that collected demographic data on providers, the number of children served, participation in the Child Care Assistance Program, and prices. Of 508 certified school-age care providers sent a survey, 391 completed it, resulting in a response rate of 76.8%. Survey results were representative of 58 of 87 Minnesota counties (66.7%); given the 2021 cluster assignments, all four price clusters were represented.

CHAPTER 4



Results of the market price analysis

Licensed center-based provider percentile calculations

Table 2 shows the 25th, 50th, and 75th percentile calculations for each age group and price mode (hourly, daily, weekly) for each of the four price clusters for licensed center-based child care providers. The 50th percentile is equivalent to the median. A comparison of Child Care Assistance Program reimbursement rates (effective Oct. 30, 2023, based on 2021 price data) and current market prices for child care centers finds that approximately 83% of reimbursement rates examined are below 2024’s 75th market price percentile, 69% are below the 50th percentile, and 41% are below the 25th percentile.

Table 2: Licensed center-based provider rates and percentiles by price cluster and age of care

Center price cluster	Age group	Hourly 25 th percentile	Hourly 50 th percentile	Hourly 75 th percentile	Daily 25 th percentile	Daily 50 th percentile	Daily 75 th percentile	Weekly 25 th percentile	Weekly 50 th percentile	Weekly 75 th percentile
1	Infant	\$4.15	\$5.00	\$5.85	\$40.00	\$49.00	\$52.00	\$190.00	\$213.00	\$245.00
	Toddler	\$4.45	\$4.85	\$5.65	\$40.00	\$46.00	\$53.00	\$180.00	\$195.00	\$225.00
	Preschool	\$3.90	\$4.45	\$5.50	\$37.50	\$42.00	\$45.00	\$170.00	\$190.00	\$210.00
	School age	\$4.10	\$4.73	\$5.50	\$30.00	\$40.00	\$50.00	\$145.00	\$170.00	\$190.00
2	Infant	\$4.25	\$12.00	\$14.00	\$50.00	\$55.00	\$67.50	\$233.00	\$255.00	\$274.00
	Toddler	\$4.05	\$11.00	\$12.00	\$45.00	\$50.00	\$61.00	\$212.00	\$240.00	\$250.00
	Preschool	\$4.00	\$10.00	\$12.00	\$40.00	\$47.00	\$59.00	\$200.00	\$220.00	\$240.00
	School age	\$4.00	\$8.00	\$12.00	\$36.00	\$40.00	\$50.00	\$162.00	\$182.00	\$200.00
3	Infant	\$16.00	\$22.00	\$26.00	\$72.00	\$99.00	\$212.00	\$315.00	\$363.00	\$418.00
	Toddler	\$14.50	\$20.00	\$24.00	\$69.00	\$82.00	\$120.00	\$275.00	\$318.00	\$364.00
	Preschool	\$13.50	\$18.50	\$21.00	\$62.00	\$74.00	\$120.00	\$258.00	\$294.00	\$328.00
	School age	\$8.50	\$14.00	\$16.80	\$45.00	\$55.00	\$105.00	\$155.00	\$215.00	\$250.00
4	Infant	\$21.60	\$26.00	\$26.00	\$131.00	\$245.00	\$261.00	\$415.00	\$475.00	\$512.40
	Toddler	\$19.20	\$24.00	\$24.00	\$104.00	\$206.00	\$230.40	\$358.00	\$424.00	\$462.00
	Preschool	\$16.80	\$21.00	\$21.00	\$83.00	\$145.00	\$200.00	\$310.00	\$372.00	\$398.40
	School age	\$16.36	\$16.80	\$21.00	\$78.00	\$124.00	\$132.00	\$273.00	\$355.00	\$375.00



Licensed family child care provider percentile calculations

Table 3 shows the 25th, 50th, and 75th percentile calculations for each age group and price mode (hourly, daily, weekly) for each of the four price clusters for licensed family child care providers. The 50th percentile is equivalent to the median. A comparison of department reimbursement rates (effective Oct. 30, 2023, based on 2021 price data) and current market prices for family child care providers finds that approximately 87% of reimbursement rates examined are below the 2024’s 75th market price percentile, 35% are below the 50th percentile, and 15% are below the 25th percentile.

Table 3: Family child care provider rates and percentiles by price cluster and age of care

Family child care price cluster	Age group	Hourly 25 th percentile	Hourly 50 th percentile	Hourly 75 th percentile	Daily 25 th percentile	Daily 50 th percentile	Daily 75 th percentile	Weekly 25 th percentile	Weekly 50 th percentile	Weekly 75 th percentile
1	Infant	\$2.70	\$3.00	\$3.00	\$25.00	\$28.00	\$30.00	\$130.00	\$140.00	\$150.00
	Toddler	\$2.65	\$2.75	\$3.00	\$25.00	\$27.00	\$30.00	\$125.00	\$135.00	\$150.00
	Preschool	\$2.60	\$2.75	\$3.00	\$25.00	\$26.00	\$29.00	\$125.00	\$130.00	\$140.00
	School age	\$2.50	\$2.75	\$3.00	\$24.00	\$25.00	\$29.00	\$90.00	\$125.00	\$130.00
2	Infant	\$2.90	\$3.15	\$3.50	\$30.00	\$31.00	\$35.00	\$145.00	\$155.00	\$175.00
	Toddler	\$2.80	\$3.00	\$3.50	\$28.00	\$30.00	\$35.00	\$140.00	\$150.00	\$170.00
	Preschool	\$2.80	\$3.00	\$3.50	\$27.00	\$30.00	\$35.00	\$135.00	\$150.00	\$160.00
	School age	\$2.80	\$3.00	\$3.50	\$25.00	\$30.00	\$32.00	\$125.00	\$140.00	\$150.00
3	Infant	\$3.25	\$3.50	\$4.25	\$35.00	\$40.00	\$45.00	\$170.00	\$190.00	\$205.00
	Toddler	\$3.08	\$3.50	\$4.25	\$33.00	\$37.00	\$40.00	\$160.00	\$180.00	\$200.00
	Preschool	\$3.00	\$3.50	\$4.05	\$31.00	\$35.00	\$40.00	\$155.00	\$175.00	\$190.00
	School age	\$3.10	\$3.75	\$4.50	\$30.00	\$34.00	\$40.00	\$140.00	\$160.00	\$175.00
4	Infant	\$6.25	\$9.00	\$12.00	\$42.00	\$50.00	\$60.00	\$200.00	\$225.00	\$250.00
	Toddler	\$6.00	\$8.82	\$10.80	\$40.00	\$50.00	\$60.00	\$190.00	\$213.00	\$250.00
	Preschool	\$5.82	\$8.00	\$10.00	\$40.00	\$45.00	\$45.00	\$180.00	\$200.00	\$230.00
	School age	\$5.82	\$8.00	\$10.00	\$35.00	\$40.00	\$50.00	\$150.00	\$180.00	\$205.00

Cluster assignments

As described in the Methodology section, Minnesota counties were grouped into price clusters by provider type based on similarities in price distributions among counties. Table 4 provides cluster assignments for both center-based and family child care providers. Figures 1 and 2 show cluster assignments on maps for center-based and family child care providers, respectively.



Summary of center-based provider cluster assignments

For center-based providers, 50 of 77 counties (64.9%) were assigned to the same cluster as the 2021 report.

- Twenty-two counties (Beltrami, Carver, Cook, Freeborn, Goodhue, Houston, Hubbard, Isanti, Lyon, McLeod, Mille Lacs, Nicollet, Nobles, Pennington, Polk, Pope, Rice, St. Louis, Stearns, Wabasha, Waseca, and Yellow Medicine) decreased one cluster assignment.
- One, Lake County, decreased two cluster assignments.
- Two counties (Pine and Sibley) increased one cluster assignment.
- One, Mahnomen County, increased two cluster assignments.
- Ten counties (Big Stone, Clearwater, Grant, Koochiching, Lake of the Woods, Lincoln, Rock, Roseau, Traverse, and Wilkin) had no 2024 center-based data and were not assigned to clusters.

Summary of family child care provider cluster assignments

For family child care providers, 61 of 87 counties (70.1%) were assigned to the same cluster as the previous report. Four counties (Big Stone, Faribault, Lake of the Woods, and Nicolett) decreased one cluster assignment; 21 counties (Anoka, Becker, Cass, Chippewa, Dodge, Grant, Houston, Kanabec, Koochiching, Lake, Le Sueur, Lincoln, Marshall, Meeker, Morrison, Nobles, Polk, Red Lake, Steele, Todd, and Wadena) increased one cluster assignment; and Freeborn County increased two cluster assignments.

Table 4: Cluster assignments for center-based and family child care providers

County name	Center-based price cluster assignment	Family child care price cluster assignment	County name	Center-based price cluster assignment	Family child care price cluster assignment
Aitkin	1	3	Clay	2	3
Anoka	4	4	Clearwater	Unassigned	1
Becker	2	3	Cook	2	4
Beltrami	2	2	Cottonwood	1	2
Benton	3	2	Crow Wing	2	2
Big Stone	Unassigned	1	Dakota	4	4
Blue Earth	2	2	Dodge	2	3
Brown	1	2	Douglas	2	2
Carlton	2	3	Faribault	1	1
Carver	3	4	Fillmore	1	2
Cass	1	3	Freeborn	1	3
Chippewa	1	2	Goodhue	2	3
Chisago	3	3	Grant	Unassigned	2

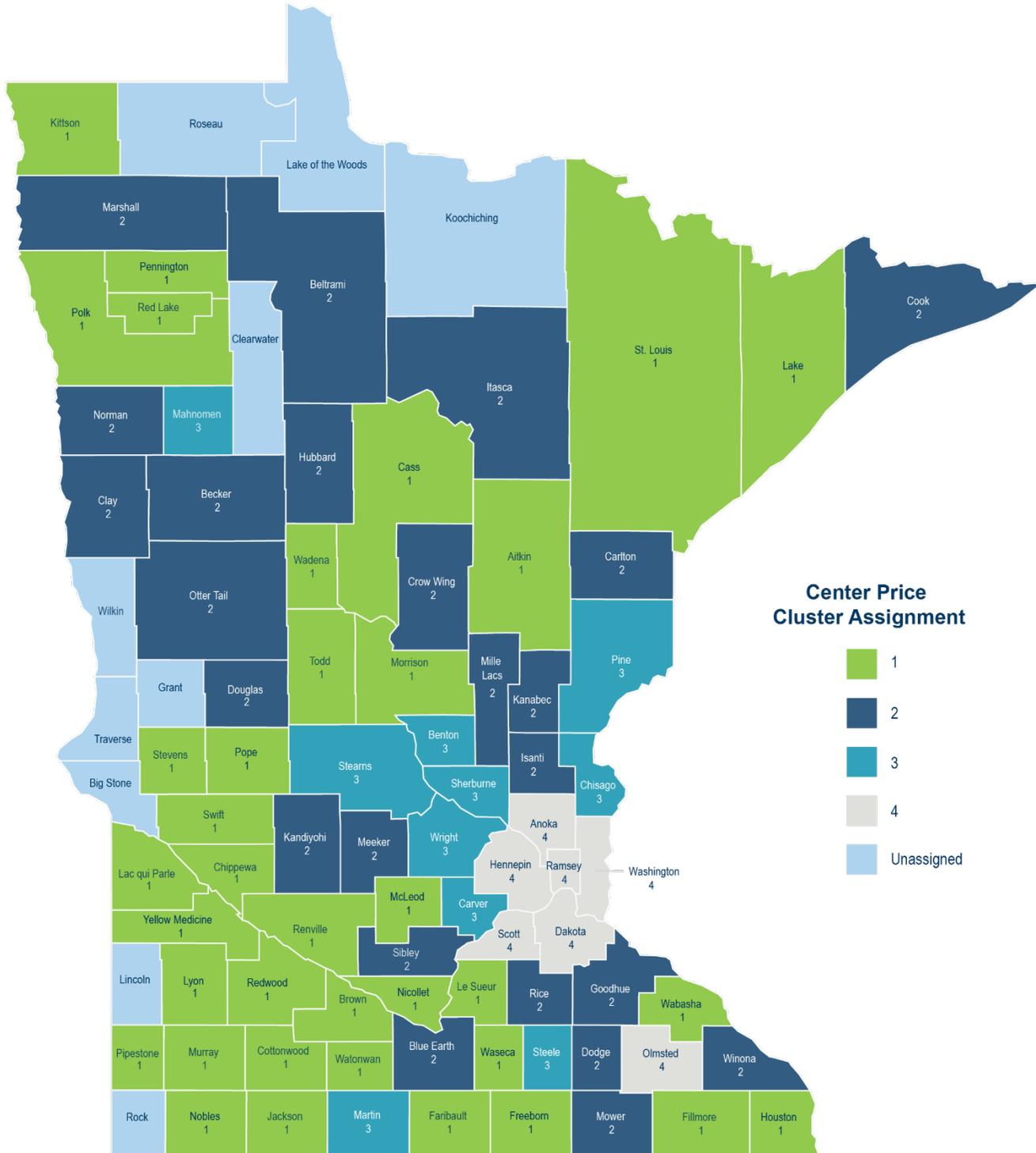
County name	Center-based price cluster assignment	Family child care price cluster assignment
Hennepin	4	4
Houston	1	3
Hubbard	2	2
Isanti	2	3
Itasca	2	3
Jackson	1	1
Kanabec	2	3
Kandiyohi	2	2
Kittson	1	1
Koochiching	Unassigned	2
Lac qui Parle	1	1
Lake	1	3
Lake of the Woods	Unassigned	2
Le Sueur	1	3
Lincoln	Unassigned	2
Lyon	1	1
McLeod	1	2
Mahnomen	3	2
Marshall	2	2
Martin	3	1
Meeker	2	2
Mille Lacs	2	2
Morrison	1	2
Mower	2	2
Murray	1	1
Nicollet	1	1
Nobles	1	2
Norman	2	1
Olmsted	4	3
Otter Tail	2	2
Pennington	1	2

County name	Center-based price cluster assignment	Family child care price cluster assignment
Pine	3	2
Pipestone	1	1
Polk	1	2
Pope	1	2
Ramsey	4	4
Red Lake	1	2
Redwood	1	2
Renville	1	1
Rice	2	3
Rock	Unassigned	1
Roseau	Unassigned	1
St. Louis	1	3
Scott	4	4
Sherburne	3	3
Sibley	2	2
Stearns	3	2
Steele	3	2
Stevens	1	2
Swift	1	1
Todd	1	2
Traverse	Unassigned	2
Wabasha	1	2
Wadena	1	2
Waseca	1	2
Washington	4	4
Watsonwan	1	1
Wilkin	Unassigned	1
Winona	2	2
Wright	3	3
Yellow Medicine	1	1

Note: Counties with no reported prices in 2024 are not assigned to a price cluster.



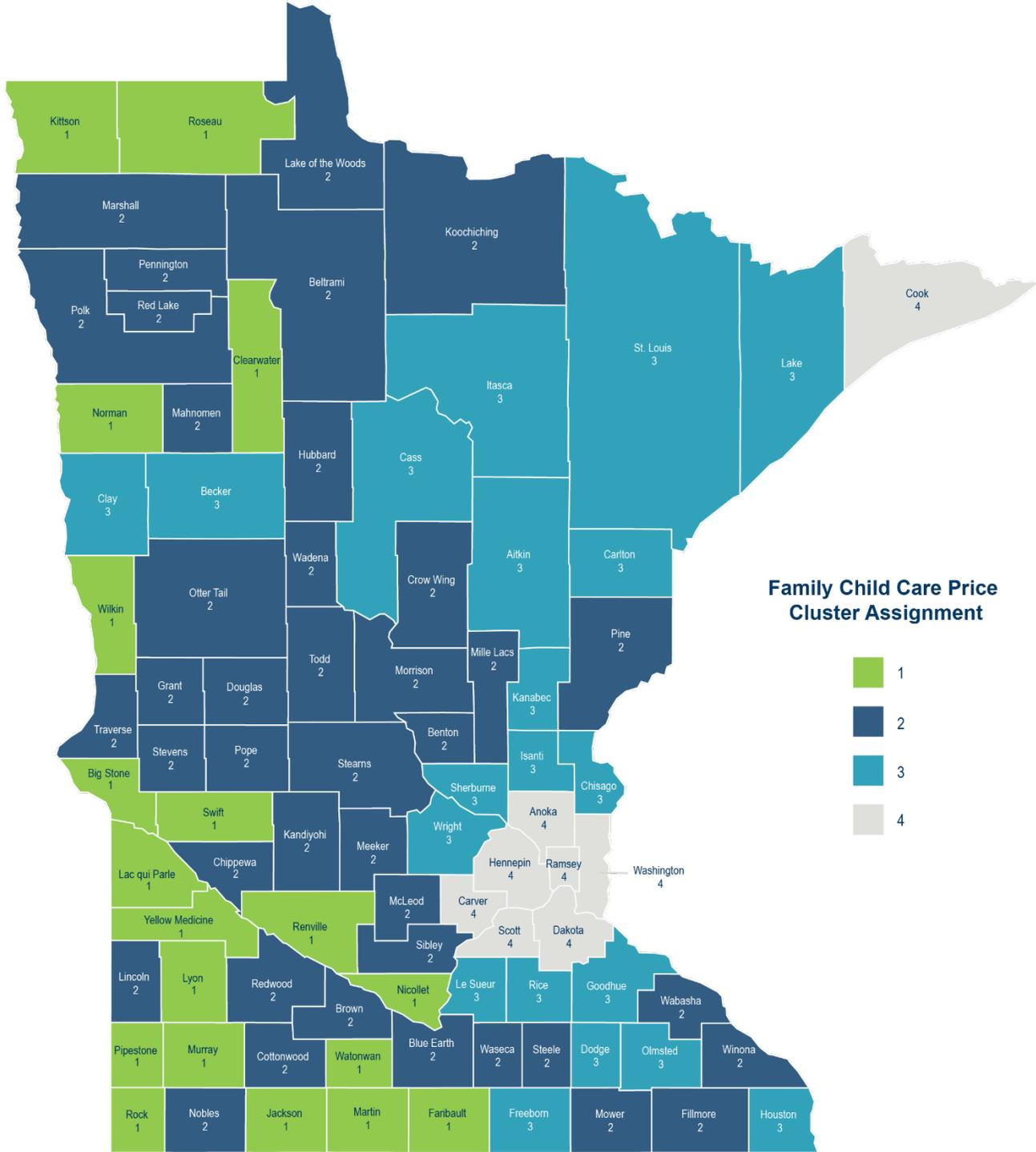
Figure 1: 2024 price cluster assignments for center-based providers



Note: Counties with no reported center rates in 2024 are not assigned a price cluster.



Figure 2: 2024 price cluster assignments for family child care providers



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Comparison of provider prices and differential rates

In addition to the standard reimbursement rate that providers receive when serving families participating in the Child Care Assistance Program (CCAP), providers are also eligible to receive up to an additional 15% differential (in addition to hourly, daily, or weekly reimbursement rates) if they hold certain accreditations or credentials or have a Three-Star Parent Aware Rating. Providers are eligible for up to a 20% differential if they have a Four-Star Parent Aware Rating.

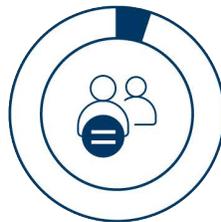
Researchers compared prices providers charge with differential rates they receive for meeting additional quality standards. In general, most differential rates are equal to or higher than prices providers charge, a significant change from the last version of the market price analysis, which found most rates less than prices charged. [Minnesota Department of Human Services, 2021] As shown in Figure 3, differential rates effective Oct. 30, 2023, are more than prices charged for 60.09% of center-based providers and 72.58% of family child care providers that have Three-Star Ratings or hold accreditations or credentials. [Minnesota Department of Human Services, 2023a] As shown in Figure 4, differential rates for Four-Star Rated providers are more than prices charged for 27.44% of center-based providers and 32.70% of family child care providers. [Minnesota Department of Human Services, 2023b]

Figure 3: Three-Star and accredited provider prices compared to 15% differential rate in effect at time of the survey

Three-Star Accredited Centers



34.86%



5.05%



60.09%

Three-Star Accredited Family Child Care



27.03%



72.58%

Three-Star differential rate is:



LESS than Provider Price



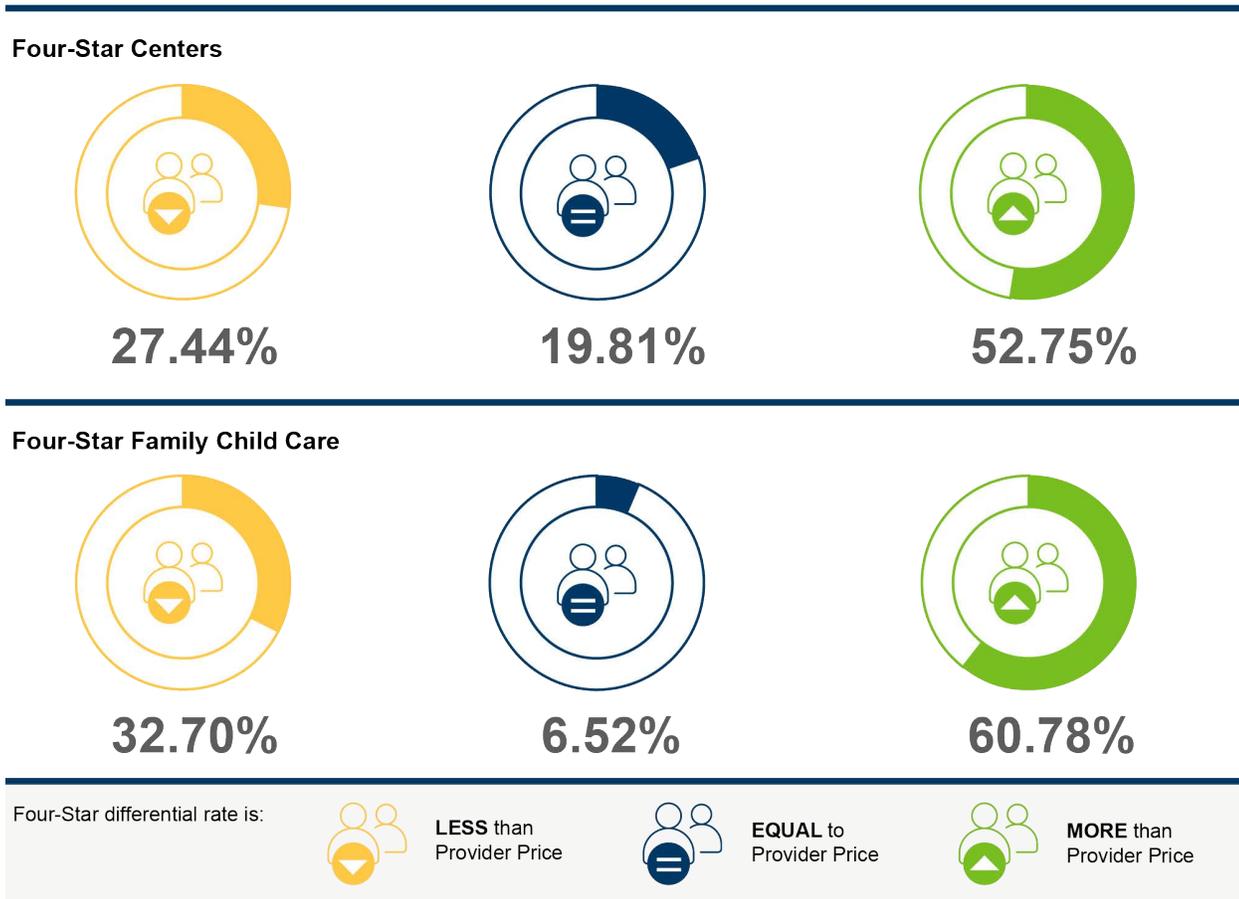
EQUAL to Provider Price



MORE than Provider Price

Note: The number of prices at the maximum rate were less than 0.5% and therefore left out of the graphic.

Figure 4: Four-Star provider prices compared to 20% differential rate in effect at the time of the survey



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Findings from the market price analysis

Based on the analysis detailed above, key findings include:

Progress was made to increase reimbursement rates since 2021; the rates going into effect Jan. 6, 2025, will meet or exceed the 75th percentile benchmark in most areas for both types of care.

A comparison of CCAP reimbursement rates that will go into effect Jan. 6, 2025, and prices gathered during the 2024 Market Rate Survey for:

- Child care centers shows that none of the reimbursement rates examined are below the 75th market price percentile, 3.7% are below the 50th percentile, and 2.3% are below the 25th percentile. This represents an improvement compared to findings in the 2021 Child Care Market Price Analysis.
- Family child care providers shows that none of the reimbursement rates examined are below the 75th market price percentile, none are below the 50th percentile, and none are below the 25th percentile. This represents an improvement compared to findings in the 2021 analysis.

The 2024-based differential reimbursement rates for providers with Three- and Four-Star Parent Aware ratings significantly improve the percentage of private market prices covered by those rates.

A comparison of provider prices and differential reimbursement rates the department will pay to providers that meet higher quality standards (providers with Three- and Four-Star Parent Aware ratings, that are accredited, or that achieved specific credentials) finds that most differential rates taking effect Jan. 6, 2025, are equal to or more than prices that providers charge. This represents a significant improvement in access to the market over findings in the 2021 market price analysis.



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Narrow child care cost model analysis

Background on child care markets

States have historically set reimbursement rates for child care subsidies based on market prices. However, market price analyses do not capture the true cost of providing child care and do not take market failures into consideration. As a result, providers can only charge prices that parents in their area are able and willing to pay for child care. Prices charged may not produce revenue required to fully cover costs associated with stable, high-quality care (most important, costs of hiring and retaining staff with the required education and experience).

While market price analyses provide important information to inform rate-setting and broader subsidy policies, prices reported may vary widely based on incomes of the surrounding community and are not likely to reflect the true cost of providing child care. Basing subsidy reimbursement rates on already depressed market prices instead of on the cost of providing child care puts child care programs in a precarious business model, reinforcing a cycle of poorly paid staff and low-quality care, even when a program's leadership and staff are committed to quality improvement. [Bipartisan Policy Center, 2020]

To better understand the true cost of providing child care in Minnesota, the department contracted with [First Children's Finance](#) to conduct a narrow child care cost-modeling analysis to augment findings of the 2024 Child Care Market Price Analysis. A description of the methodology and results from the cost model analysis is in the [2023 Minnesota Child Care Cost Modeling report](#). Key findings from the analysis are included in this report because it has critical implications for rate-setting and early childhood finance policy.

Findings from the child care cost model analysis

Description of narrow cost model analysis

The model estimates the cost of meeting health and safety requirements for licensed child care programs in Minnesota. It calculates how costs vary based on the age of children served, geographic location, license type, and quality of care.

Data collection for the study occurred from July 2022 through February 2023. The methodology included a program cost survey, business interviews, listening sessions, community conversations with partner organizations, and monthly engagement with a provider advisory group. The demographics of participants were analyzed and found to be geographically and socioeconomically representative of licensed child care programs across Minnesota.



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Key findings

The cost analysis confirmed that for most modeled scenarios, the costs of operating a child care business are far higher than the prices that providers are able to charge families. Overall, the analysis showed that current revenue does not support the cost of infant care in any geographic, quality, or license type scenario across both centers and family child care. The model also demonstrated that providers in Greater Minnesota are particularly vulnerable, as their costs are similar to providers across the state, but they are not able to support higher tuition rates. The model indicated that true cost of quality is unmet by the current market. The study looked at costs of providing higher-quality care by using Parent Aware Standards and Indicators as a proxy for measuring program quality. Four-Star Parent Aware Rated centers reported higher wages and increased benefits to attract and retain qualified staff, while Four-Star Rated family child care providers reported working an additional three hours a week. The resources available to programs in Minnesota's early care and education system, such as CCAP differentials and Quality Grants, do not offset these costs.

Minnesota is exploring how cost information can be used in conjunction with market price information and a provider wage scale to help inform CCAP rate setting. An upcoming legislative report (to be published in early 2025) will examine potential pathways for using this information in the rate setting process and steps for seeking federal approval.

CHAPTER

6



Policy considerations

Access to quality child care is essential to children most at risk, such as those from families with low incomes and children of color. Such access is an important strategy to close gaps in outcomes and opportunities, especially in Minnesota, where students of color face some of the worst achievement gaps nationally. [Grunewald & Nath, 2019] Department staff is working to close gaps by improving access to quality early learning opportunities. The following policy considerations are based on the market price analysis and narrow cost model analysis. These are intended to assist the department in its efforts to close opportunity gaps by helping early learning programs stabilize operations, increase quality programming, and become sustainable resources for families and economic development partners in their communities. The department may consider:

- **Continuing to increase CCAP provider payment rates**, as needed, to align with provider costs, ensuring that providers receiving Child Care and Development Fund grants have the means to provide high-quality care for low-income families.
- Further exploring ways to more precisely **identify areas where depressed prices may constrain the ability of child care programs to build and sustain quality**, because the amount programs can charge in the private market has a significant impact on budgets available to support quality.
- Developing or continuing **strategies to provide direct supply-side incentives** (e.g., substantial quality grants based on the size of a program) for programs in both greater Minnesota and metro regions where private markets may not provide enough revenue to build and sustain quality, and increase access to child care in areas where needed.
- Developing or continuing **strategies to provide support to develop and sustain infant and toddler capacity** because the private market tends not to provide funding to support care in this area, especially at higher levels of quality.
- **Determining a methodology to establish contracts or grants** for child care slots that can support the need for child care during non-traditional hours and for infants/toddlers.
- Exploring how **cost information can be used in conjunction with market price information and a provider wage scale** to help inform CCAP rate setting.

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Appendix A: Licensed center-based provider percentile calculations

Tables A.1 through A.4 show the 25th, 30th, 40th, 50th, and 75th percentile calculations for each age group and price mode (hourly, daily, weekly) for each of the four price clusters for licensed center-based child care providers. The 50th percentile is equivalent to the median.

Table A.1: Licensed center-based provider rates and percentiles by age group for price cluster one

Center-based price cluster one					
Price mode	Percentile	Infant	Toddler	Preschool	School age
Hourly	25 th percentile	\$4.15	\$4.45	\$3.90	\$4.10
	30 th percentile	\$4.15	\$4.45	\$3.95	\$4.10
	40 th percentile	\$4.80	\$4.65	\$4.20	\$4.73
	50 th percentile	\$5.00	\$4.85	\$4.45	\$4.73
	75 th percentile	\$5.85	\$5.65	\$5.50	\$5.50
Daily	25 th percentile	\$40.00	\$40.00	\$37.50	\$30.00
	30 th percentile	\$40.00	\$44.00	\$38.00	\$30.00
	40 th percentile	\$48.00	\$45.00	\$41.00	\$37.00
	50 th percentile	\$49.00	\$46.00	\$42.00	\$40.00
	75 th percentile	\$52.00	\$53.00	\$45.00	\$50.00
Weekly	25 th percentile	\$190.00	\$180.00	\$170.00	\$145.00
	30 th percentile	\$195.00	\$180.00	\$170.00	\$150.00
	40 th percentile	\$200.00	\$190.00	\$178.50	\$159.14
	50 th percentile	\$213.00	\$195.00	\$190.00	\$170.00
	75 th percentile	\$245.00	\$225.00	\$210.00	\$190.00

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Table A.2: Licensed center-based provider rates and percentiles by age group for price cluster two

Center-based price cluster two					
Price mode	Percentile	Infant	Toddler	Preschool	School age
Hourly	25 th percentile	\$4.25	\$4.05	\$4.00	\$4.00
	30 th percentile	\$10.00	\$10.00	\$4.00	\$4.00
	40 th percentile	\$11.00	\$11.00	\$4.62	\$4.05
	50 th percentile	\$12.00	\$11.00	\$10.00	\$8.00
	75 th percentile	\$14.00	\$12.00	\$12.00	\$12.00
Daily	25 th percentile	\$50.00	\$45.00	\$40.00	\$36.00
	30 th percentile	\$50.00	\$48.00	\$42.00	\$37.00
	40 th percentile	\$51.00	\$49.00	\$45.00	\$39.00
	50 th percentile	\$55.00	\$50.00	\$47.00	\$40.00
	75 th percentile	\$67.50	\$61.00	\$59.00	\$50.00
Weekly	25 th percentile	\$233.00	\$212.00	\$200.00	\$162.00
	30 th percentile	\$235.00	\$216.00	\$205.00	\$175.00
	40 th percentile	\$245.00	\$225.00	\$212.00	\$175.00
	50 th percentile	\$255.00	\$240.00	\$220.00	\$182.00
	75 th percentile	\$274.00	\$250.00	\$240.00	\$200.00



Table A.3: Licensed center-based provider rates and percentiles by age group for price cluster three

Center-based price cluster three					
Price mode	Percentile	Infant	Toddler	Preschool	School age
Hourly	25 th percentile	\$16.00	\$14.50	\$13.50	\$8.50
	30 th percentile	\$16.00	\$16.00	\$16.00	\$8.50
	40 th percentile	\$21.60	\$20.00	\$16.80	\$8.50
	50 th percentile	\$22.00	\$20.00	\$18.50	\$14.00
	75 th percentile	\$26.00	\$24.00	\$21.00	\$16.80
Daily	25 th percentile	\$72.00	\$69.00	\$62.00	\$45.00
	30 th percentile	\$87.00	\$77.00	\$65.00	\$50.00
	40 th percentile	\$92.00	\$79.25	\$73.00	\$55.00
	50 th percentile	\$99.00	\$82.00	\$74.00	\$55.00
	75 th percentile	\$212.00	\$120.00	\$120.00	\$105.00
Weekly	25 th percentile	\$315.00	\$275.00	\$258.00	\$155.00
	30 th percentile	\$320.00	\$288.00	\$266.00	\$175.00
	40 th percentile	\$349.00	\$304.00	\$280.00	\$185.00
	50 th percentile	\$363.00	\$318.00	\$294.00	\$215.00
	75 th percentile	\$418.00	\$364.00	\$328.00	\$250.00



Table A.4: Licensed center-based provider rates and percentiles by age group for price cluster four

Center-based price cluster four					
Price mode	Percentile	Infant	Toddler	Preschool	School age
Hourly	25 th percentile	\$21.60	\$19.20	\$16.80	\$16.36
	30 th percentile	\$22.00	\$19.20	\$16.80	\$16.80
	40 th percentile	\$26.00	\$21.00	\$16.80	\$16.80
	50 th percentile	\$26.00	\$24.00	\$21.00	\$16.80
	75 th percentile	\$26.00	\$24.00	\$21.00	\$21.00
Daily	25 th percentile	\$131.00	\$104.00	\$83.00	\$78.00
	30 th percentile	\$155.00	\$115.00	\$96.25	\$87.00
	40 th percentile	\$221.00	\$150.00	\$120.00	\$102.00
	50 th percentile	\$245.00	\$206.00	\$145.00	\$124.00
	75 th percentile	\$261.00	\$230.40	\$200.00	\$132.00
Weekly	25 th percentile	\$415.00	\$358.80	\$310.00	\$273.00
	30 th percentile	\$427.00	\$375.00	\$320.00	\$286.00
	40 th percentile	\$449.00	\$394.00	\$350.00	\$310.00
	50 th percentile	\$475.00	\$424.00	\$372.00	\$355.00
	75 th percentile	\$512.40	\$462.00	\$398.40	\$375.00



Appendix B:

Licensed family child care provider percentile calculations

Tables B.1 through B.4 show the 25th, 30th, 40th, 50th, and 75th percentile calculations for each age group and price mode (hourly, daily, weekly) for each of the four price clusters for licensed family child care providers. The 50th percentile is equivalent to the median.

Table B.1: Family child care provider rates and percentiles by age group for price cluster one

Family child care provider rates price cluster one					
Price mode	Percentile	Infant	Toddler	Preschool	School age
Hourly	25 th percentile	\$2.70	\$2.65	\$2.60	\$2.50
	30 th percentile	\$2.75	\$2.75	\$2.70	\$2.65
	40 th percentile	\$2.80	\$2.75	\$2.75	\$2.75
	50 th percentile	\$3.00	\$2.75	\$2.75	\$2.75
	75 th percentile	\$3.00	\$3.00	\$3.00	\$3.00
Daily	25 th percentile	\$25.00	\$25.00	\$25.00	\$24.00
	30 th percentile	\$25.00	\$25.00	\$25.00	\$25.00
	40 th percentile	\$27.00	\$26.00	\$25.00	\$25.00
	50 th percentile	\$28.00	\$27.00	\$26.00	\$25.00
	75 th percentile	\$30.00	\$30.00	\$29.00	\$29.00
Weekly	25 th percentile	\$130.00	\$125.00	\$125.00	\$90.00
	30 th percentile	\$130.00	\$130.00	\$125.00	\$100.00
	40 th percentile	\$135.00	\$130.00	\$125.00	\$116.00
	50 th percentile	\$140.00	\$135.00	\$130.00	\$125.00
	75 th percentile	\$150.00	\$150.00	\$140.00	\$130.00



Table B.2: Family child care provider rates and percentiles by age group for price cluster two

Family child care provider rates price cluster two					
Price mode	Percentile	Infant	Toddler	Preschool	School age
Hourly	25 th percentile	\$2.90	\$2.80	\$2.80	\$2.80
	30 th percentile	\$3.00	\$3.00	\$2.95	\$3.00
	40 th percentile	\$3.00	\$3.00	\$3.00	\$3.00
	50 th percentile	\$3.15	\$3.00	\$3.00	\$3.00
	75 th percentile	\$3.50	\$3.50	\$3.50	\$3.50
Daily	25 th percentile	\$30.00	\$28.00	\$27.00	\$25.00
	30 th percentile	\$30.00	\$29.00	\$28.00	\$26.00
	40 th percentile	\$30.00	\$30.00	\$30.00	\$28.00
	50 th percentile	\$31.00	\$30.00	\$30.00	\$30.00
	75 th percentile	\$35.00	\$35.00	\$35.00	\$32.00
Weekly	25 th percentile	\$145.00	\$140.00	\$135.00	\$125.00
	30 th percentile	\$150.00	\$140.00	\$140.00	\$130.00
	40 th percentile	\$150.00	\$150.00	\$145.00	\$135.00
	50 th percentile	\$155.00	\$150.00	\$150.00	\$140.00
	75 th percentile	\$175.00	\$170.00	\$160.00	\$150.00



Table B.3: Family child care provider rates and percentiles by age group for price cluster three

Family child care provider rates price cluster three					
Price mode	Percentile	Infant	Toddler	Preschool	School age
Hourly	25 th percentile	\$3.25	\$3.08	\$3.00	\$3.10
	30 th percentile	\$3.25	\$3.25	\$3.15	\$3.25
	40 th percentile	\$3.50	\$3.50	\$3.25	\$3.50
	50 th percentile	\$3.50	\$3.50	\$3.50	\$3.75
	75 th percentile	\$4.25	\$4.25	\$4.05	\$4.50
Daily	25 th percentile	\$35.00	\$33.00	\$31.00	\$30.00
	30 th percentile	\$35.00	\$34.00	\$32.00	\$30.00
	40 th percentile	\$35.00	\$35.00	\$35.00	\$31.00
	50 th percentile	\$40.00	\$37.00	\$35.00	\$34.00
	75 th percentile	\$45.00	\$40.00	\$40.00	\$40.00
Weekly	25 th percentile	\$170.00	\$160.00	\$155.00	\$140.00
	30 th percentile	\$175.00	\$165.00	\$160.00	\$145.00
	40 th percentile	\$180.00	\$175.00	\$165.00	\$150.00
	50 th percentile	\$190.00	\$180.00	\$175.00	\$160.00
	75 th percentile	\$205.00	\$200.00	\$190.00	\$175.00



Table B.4: Family child care provider rates and percentiles by age group for price cluster four

Family child care provider rates price cluster four					
Price mode	Percentile	Infant	Toddler	Preschool	School age
Hourly	25 th percentile	\$6.25	\$6.00	\$5.82	\$5.82
	30 th percentile	\$7.00	\$6.60	\$6.00	\$6.00
	40 th percentile	\$7.20	\$7.00	\$7.00	\$7.00
	50 th percentile	\$9.00	\$8.82	\$8.00	\$8.00
	75 th percentile	\$12.00	\$10.80	\$10.00	\$10.00
Daily	25 th percentile	\$42.00	\$40.00	\$40.00	\$35.00
	30 th percentile	\$45.00	\$41.00	\$40.00	\$36.00
	40 th percentile	\$50.00	\$45.00	\$44.00	\$40.00
	50 th percentile	\$50.00	\$50.00	\$45.00	\$40.00
	75 th percentile	\$60.00	\$60.00	\$55.00	\$50.00
Weekly	25 th percentile	\$200.00	\$190.00	\$180.00	\$150.00
	30 th percentile	\$200.00	\$195.00	\$185.00	\$160.00
	40 th percentile	\$213.00	\$200.00	\$190.00	\$175.00
	50 th percentile	\$225.00	\$213.00	\$200.00	\$180.00
	75 th percentile	\$250.00	\$250.00	\$230.00	\$205.00

