



## CPQ&R Data Checklist

The CPQ&R includes default data for many variables; however, you can customize the cost projections produced by the CPQ&R for your specific questions and needs<sup>1</sup>. In some cases, you may want to identify your own state or local data. This checklist helps you both identify your primary questions for producing cost projections and gather the data needed. The following questions are meant to assist you in assessing the program's current status and guide your team in identifying the scenarios you would like to create with the CPQ&R.

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<sup>1</sup> If you do not wish to include any of the specific cost variables in the CPQ&R in your estimates, you can over-ride the default and set the value to zero.

## SCENARIO 1<sup>2</sup>:

**Note:** *It is helpful to have your Standards crosswalk and/or other data on program requirements handy.*

CPQ&R Information Refer to User Guide for Descriptions	Current Status (YEAR 0)	Scenario: What do you want to model differently?	Source of the Data (person or organization)	Notes
<b>ANNUAL SLOTS</b>				
<b>Cumulative Number of 3- &amp; 4-year-old slots</b>	How many 3-year-olds and 4-year-olds do you currently serve (this is Year 0)? <i>Note: you can decide to model 3 and 4 year olds separately, depending on the structure of your program.</i>	Do you have a goal to increase the number of 3 and/or 4 year old children served in the coming years?		
<b>FPL eligibility threshold</b>	What is the program's Federal Poverty Limit to qualify for state-funded preschool? Or for other major funding source(s) used to fund the program you are modeling.	Do you want to increase enrollment over time by serving students in lower FPL eligibility thresholds first and then moving to higher FPL eligibility thresholds?		
<b>Target % of Slots for ELL</b>	How many children do you expect to serve in this program that are English Language Learners?	Do you have a goal to serve more students that are ELL?		

<sup>2</sup> We refer to "scenario" as the specific cost projection you are modeling. Often users will model multiple scenarios so you should begin with the Master Scenario- typically the highest priority you have for cost projections. For ease of reference, you can name this, e.g. "Increase Access 80% of 4 Year Olds + Increase Quality-Teacher BA".

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<b>Target % of Slots for Special Needs</b>	How many children do you expect to serve in this program that have special needs?	Do you have a goal to serve more students with special needs?		
<b>Target % of Slots for Rural Areas</b>	What percentage of children attend programs in rural areas?	Do you have a goal to serve more students located in rural areas?		
<b>Dosage: weeks per year</b>	What is the number of teaching employment weeks and holidays & in-service days per year for part day care, full day care, and extended care?			
<b>FUNDING STREAMS<sup>3</sup></b>				
<b>FPL Thresholds and % of Slots Estimated/Allocated by FPL Bracket by Delivery Model</b>	<p>What are the Target FPL Eligibility Threshold (% FPL)? The selected upper limit of Federal Poverty Level (FPL) for qualifying families to participate in the early learning program. Entering a target FPL eligibility threshold enables the user to measure the percentage of the eligible child population that will be served.</p> <p>What percentage of the targets are being served in Private Centers, Public School, and Head Start?</p>	This allows user to set the percentage of slots by FPL thresholds and service delivery models.		

<sup>3</sup> You can choose to come back to the funding streams section if you would like to produce the cost calculations first.

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<b>Federal, State, and Local Funding with Associated Restrictions:</b>	This table allows the user to enter the source of funds for Preschool. The rows below explain each column header.			
<b>Funding Unit</b>	What is the “funding unit” for the funding source (e.g. per child, per classroom, per site, Statewide)?			
<b>Annual Funding per Unit Volume</b>	How much funding per funding unit is allocated?			
<b>Matching funds</b>	Provides a drop-down selection for each fund source to enter if matching funds are required.			
<b>% Match</b>	What is the amount of the required % match, if any?			
<b>Beginning Year/Ending Year</b>	Enter the beginning and ending year of the fund source.			
<b>% Pass Through to Providers</b>	Enter the % of funds that is sub-granted directly to providers.			
<b>Child Eligibility Restriction</b>	Enter the FPL Threshold for the fund source.			

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<b>Delivery Model Restriction</b>	Enter the delivery model for where the funds can be spent. (Note: To identify how funds might be split among multiple delivery models, see the User Guide, "Alterable Variables" in the Funding Streams Section			
<b>% of Funding Units that are Eligible</b>	Enter the number of funding units that are <u>eligible</u> for funds.			
<b>% of Eligible Funding Units that funded.</b>	Enter the number of funding units that are <u>actually</u> funded.			
<b>QUALITY STANDARDS</b>				
<b>Maximum Class Size</b>				
<b>Maximum class size</b>	What is the maximum number of children allowed in a class?	Do you have a goal to reduce class size?		
<b>Enrollment efficiency</b>	What is the expected amount of enrollment efficiency (slot vacancy rate resulting from child turnover, attrition, etc.?)	Do you have a requirement to fill slots that open throughout the school year due to turn-over rates?		
<b>Staff-Child Ratio</b>				
<b>Maximum number of children per classroom adult</b>	What is the maximum number of children per classroom adult?			

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<b>Maximum Number of Children per Classroom Adult by Implementation Year</b>	What is the maximum number of children per classroom adult by implementation year?	Do you have a goal to reduce class size over-time?		
<b>Maximum number of lead teachers per class</b>	What is the maximum number of lead teacher qualifications per class in lieu of assistants, if desired?			
<b>Number of classes per day per classroom adult</b>	The number of classes per day a lead or assistant teacher instructs? This will establish the number of teachers needed to satisfy the stated slot plan.	Do you have enough qualified teachers for an increased enrollment?		
<b>Additional Teaching Staff for Special Populations</b>	Do you employ additional classroom staff—above and beyond that required from the maximum number of children per classroom adult and the number of classes per day per classroom adult—to further support ELL and/ Special Needs children? The CPQ&R ties these assumptions to the target % of ELL slots and the target % of Special Needs slots.	Do you expect the number of ELL or Special Needs children to increase? Will you require additional staff (i.e., Lead Teachers) to serve them?		

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<b>Number of preschool classrooms per facility</b>	What is the average number of preschool classrooms per delivery system? This establishes the number of facilities based on the number of classes to satisfy the stated slot plan.			
<b>Lead Teacher &amp; Assistant Teacher Degree</b>				
<b>% of Teachers by Degree Level (AA/BA, CDA)</b>	What is the percentage of existing teachers by degree level?	Are you looking to increase degree attainment of teachers?		
<b>Churn: % of Existing Teachers Leaving the Workforce Each Year</b>	What is the percentage of existing teachers leaving the workforce each year by degree attainment?	The user can use this number to determine how many teaching positions must be replaced each year.		
<b>Entry Schedule</b>	What is the entry schedule for lead teachers enrolling in BA program in the current year? (100% = 1 year, 50% = 2 Years).	If a large, pre-existing base of early learning teachers exist, then this allows the user to 'spread out' the number who begin pursuing a higher degree over a period of years, if desired.		
<b>% of New Teachers Hired, by Degree Level</b>	What is the percentage of new teachers hired by degree level?	Allows the user to stipulate a different degree requirement for new teachers hired to satisfy the projected slot plan and replace teachers who leave the workforce.		

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% of Participating New Teachers by Degree Level	What is the percentage of new teachers enrolling in degree programs?	Allows the user to designate a different participation rate among new teachers pursuing a higher degree, than for existing teachers.		
State-Level BA Program Tuition Support Provided per Teacher per Year	What is the State-Level BA Program Tuition Support Provided per Teacher Per Year, if any?			
<b>Lead Teacher Specialized Training</b>				
% of Lead Teachers with ECE credentials; % of Lead Teachers without an ECE participating to earn an ECE; % of new Lead Teachers hired with ECE credential; % of new Lead Teachers participating to earn an ECE	What is the percentage of Lead Teachers with ECE credentials; participating to reach that credential; percentage hired with that credential or participating to earn that credential?	Similar in structure to teacher degree levels and participation (see above), except this is independent of degree level and useful when a separate standard is established for specializing in early childhood education.		
<b>Professional Learning &amp; Support</b>				
In-Service Training Hours per year	What is the in-service training hours per year?	Are you meeting or exceeding the NIEER benchmark of at least 15 hours per year?		
One-Time Training?	Is this an annual training requirement (recurring) for each teacher, or are they required to meet the requirement only once?			



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<b>Training Fees per Teacher Per Hour</b>	What are the current training fees per teacher per hour?			
<b>Substitute Teacher Wages</b>	What is the cost per hour for teachers and assistant teachers when absent from the classroom? This occurs during paid time off (vacation days) and for in-service training hours—it is assumed that said training occurs during class hours.			
<b>Other Costs Per Teacher for State- Level Monitoring of Training Program</b>	Are there other costs associated with a state-implemented training program?			
<b>Annual Provider-Level Cost per Teacher for Individualized PD Plans</b>	Is there a provider-level cost associated with the development of Individualized PD plans for teaching staff?			
<b>Other Costs Per Teacher for State- Level Monitoring of Individualized PD Plans</b>	Are there other costs associated with a state-implemented program for individualized PD plans?			

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<b>Total Coaches (Year 0)</b>	What is the total number of existing coaches in the current year?	When provided a state-supported coaching program to providers as part of its implementation of high-quality early learning, this addresses whether any pre-existing coaches exist within the state system with the capacity to provide coaching support under the new early learning program.		
<b>FTE Allocation for Coaching</b>	What is the percentage of coaching FTE to a coaching category?			
<b>Caseload: Number of Classrooms Per Coach</b>	How many coaches are needed to satisfy the early learning slot plan?	Do you have a plan to increase the amount of coaches to meet the early learning slot plan?		
<b>Coaches Salary, Benefits, Travel, and Overhead</b>	This assumes the state is paying the cost for coaching.			
<b>Churn: % of Existing Coaches Leaving the Workforce Each Year</b>	What is the % of coaches who typically or on average leave the workforce each year?			
<b>Training Cost per Coach</b>	Is there an upfront cost for training new coaches?			

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<b>Entry Schedule for Training of Existing Coaches in Year 0</b>	If new one-time training is required for coaches, then what percentage of existing coaches will receive the training each year?			
<b>Other costs per Coach for State-level Monitoring of Coaching Program</b>	Are there any other costs associated with coaching or State level monitoring of coaching?			
<b>% of Teachers Participating in Training for Professional Learning and Support</b>	What is the % of teachers participating in all training, by implementation year?	Ramping up participation rates can be useful when implementing a new training program over a period of several years.		
<b>% of Teachers Participating in Individualized PD Plans</b>	What is the % of teachers participating in all individualized PD plans, by implementation year?	Ramping up participation rates can be useful when implementing a new PD planning program over a period of several years.		
<b>% of Teachers Participating in Coaching for Professional Learning and Support</b>	What is the % of teachers participating in all coaching, by implementation year?	Ramping up participation rates can be useful when implementing a new coaching program over a period of several years.		
<b>Other State-Level Implementation Supports for Professional Learning and Support</b>	Are there any other investments the state must make to implement its professional learning programs?			

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<b>Early Learning &amp; Development Standards</b>				
<b>Initial ELDS Development: Culturally Sensitive &amp; Aligned with Child Assessment &amp; I/T &amp; K-3 Standards</b>	What is the cost for initial development of Early Learning Development Standards?			
<b>Technical Assistance (TA) &amp; Other Ongoing Implementation Supports for ELDS</b>	What is the cost for technical assistance for implementation of ELDS?			
<b>Continuous Quality Improvement</b>				
<b>Frequency in Years Between Classroom Observations for Continuous Quality Improvement System (CQIS)</b>	What is the frequency in years between classroom observations for continuous quality improvement?			
<b>Frequency in Years Between Classroom Observations for CQIS</b>	What is the frequency of site visits for classroom observations?	Are you meeting or exceeding the NIERR benchmark of annual observations?		
<b>Cost per Classroom for Classroom Observation &amp; Data Collection</b>	What are the costs associated with classroom observations and time spent collecting/analyzing data?			

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<b>Cost per Site for State-Level Administration of Classroom Observations</b>	What are the costs per site for state level administration of classroom observations?			
<b>Cumulative Percent of Sites Participating in Classroom Observations</b>	What percentage of sites participate in classroom observations?	Ramping up participation rates can be useful when implementing a new CQIS program over several years.		
<b>Upfront Development Costs for CQIS</b>	What are the costs needed for the initial development of a Continuous Quality Improvement System?			
<b>Cost for Assessment Tools, Assessor Training &amp; Ensuring CQIS Inter-rating Reliability</b>	What are the costs for purchasing assessment tools, training, inter rating reliability training for CQIS?			
<b>Technical Assistance &amp; Other Ongoing Implementation Supports for CQIS</b>	What are costs associated with TA and/or other ongoing supports for CQIS?			
<b>Curriculum Supports</b>				
<b>Curriculum Selection Supports</b>	What is the one-time cost associated with the selection of curriculum?	Classrooms are only expected to require support in selecting a curriculum once.		

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<b>Cumulative % of Sites Participating in Curriculum Selection Supports</b>	What is the percentage of classrooms participating in curriculum selection support?	Ramping up participation rates among classrooms can be useful when implementing a new curriculum selection program over a period of several years.		
<b>One-Time Curriculum Materials Costs per Participating Classroom</b>	What is the one-time materials and upfront training costs per classroom?			
<b>Cumulative % of Classrooms Participating in Curriculum Materials Support</b>	What is the percentage of classrooms participating in curriculum materials support?	Ramping up participation rates among classrooms can be useful when implementing a new curriculum selection program over a period of several years.		
<b>Upfront Development Costs to Align Curriculum with Other State Standards</b>	What are the costs needed for the initial development of a Curriculum program?			
<b>Technical Assistance &amp; Other Ongoing Implementation Supports for Curriculum</b>	What are costs associated with TA and/or other ongoing supports for a Curriculum Support program			

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<b>Screening &amp; Referral Support Services</b>				
<b>Vision, Hearing, and/or Health Screening: Percent of Slots Participating</b>	What percentage of children are expected to receive training for vision, hearing, and/or health			
<b>Other Support Services: Percent of Slots Participating</b>	What percentage of children are expected to receive other support services annually?	What other support services are offered?		
<b>Override Vision/Hearing/ Health Screening Cost</b>	If you feel the default cost per Participating Child in your state is not correct, then what cost amount would you use instead?			
<b>Other Screening and Support Services Cost per Participating Child</b>	For other support services (in addition to vision, hearing, and/or health screening), what is the cost per participating child?			
<b>STATE (OR REGIONAL) LEVEL INFRASTRUCTURE AND COSTS</b>				
<b>Inflation Rate (historical)</b>	Allows the user to forecast annual cost increases based on rising prices; the user can set the inflation rate to 0% to see cost projections without an inflation component.	Are costs increasing but funding remaining the same creating a bigger disparity among available funding and costs?		

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<b>Baseline Administrative Cost Per Slot</b>	This sets the minimum (or existing) cost to monitor and oversee the early learning slot program; if it does not include the incremental expense for overseeing new programs initiated to raise the quality standards of said program, then such costs are identified separately under each standard (as “the cost of state level monitoring and oversight”)—which is particularly useful when the cost is driven by a metric other than child slot count; otherwise, the cost should be included as part of the baseline cost per slot.			
<b>Capacity Building (Startup Costs per New Site)</b>	For new locations, what is the level of funding to providers to cover startup costs—including building improvements, equipment, etc., that are not covered in the annual provider-level costs (see below)?			
<b>Annual Percent of New Sites Awarded Funds for Startup Costs (%)</b>	What is the percentage of new sites awarded funds for start-up costs?			



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<b>Additional System Supports Cost</b>	Are any other state-level infrastructure investments that may be required and are not directly addressed by the other sections? System supports allow the user to set values for these investments, notably IT and data systems.	Implementation supports for professional learning, ELDS, CQIS, and Curriculum are assumed in each section. What other implementation supports are required to meet the annual slot plan?		
<b>Technical Assistance Costs</b>	Are additional state-level funds to be set aside for outside consulting and other sources of TA in implementing the stated early learning slot plan? These funds are expressed as a percentage of total state-level costs.			
<b>Program Evaluation Costs</b>	Are additional state-level funds to be set aside for Program Evaluation by an independent third-party organization? These costs are expressed as a percentage of total state-level costs.			

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<b>PROVIDER LEVEL INFRASTRUCTURE AND COSTS</b>				
<b>Personnel Costs</b>				
<b>Number of Preschool Classrooms</b>	The number of early learning classrooms per facility are assumed in the NIEER Standard for Staff-Child Ratio; by providing the total size of the facility (expressed as the number of all classrooms across all ages), shared staffing costs can be allocated to early learning classrooms and slots.			
<b>Annual Salary - % of BLS (or PIR) Statistic</b>	Do you have state or region specific salary data, for each delivery model? You can override the BLS data and enter your more current data here.			
<b>Minimum Site Staffing (FTEs)</b>	What is the minimum staffing level per site for non-teaching staff?			
<b>Staffing Increment (FTE)</b>	How much increase in staffing (is needed over the minimum staffing level) each time a threshold is reached?			

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<b>Staffing Threshold (Classrooms)</b>	Each time this threshold is reached one additional staffing increment (see above) is added to the site staffing level.			
<b>Preschool Classrooms Only?</b>	Is the staffing levels, expressed in terms of the Staffing Increment and the Staffing Threshold, applicable to the total number of classrooms in the facility or only the number of Preschool classrooms?	If a non-teaching staff position is dedicated to only preschool classrooms, then you would enter "Yes" here.		
<b>Maximum Staffing FTE (Site)</b>	What is the maximum staffing FTE (per site)? This sets an upper limit to the number of FTEs than can be established for a site, regardless of staffing increments and thresholds.			
<b>Lead Teacher and Assistant Teacher Salaries by Degree Level</b>	The calculator looks up the salary factor by degree level (by state) to apply to the adjusted annual salary specified (in the rows above); this factor can be overridden if you have more recent or state specific data as needed by the user to arrive at the appropriate average salary by degree level for their needs.			

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<b>Days of Paid Leave</b>	For teaching staff, what is the average number of vacation days allocated (per person)? Sick days?	This establishes substitute teacher hours required per year.		
<b>Substitute Teacher Wages per Hour</b>	What is the average pay rate for substitute teachers?			
<b>Mandatory Benefits</b>	What is the mandatory benefits rate paid for FICA, unemployment insurance, etc. to all teaching and non-teaching staff (but not substitutes)?			
<b>Additional Benefits</b>	What is the additional benefits rate paid for health insurance and retirement savings to teaching and non-teaching staff (but not substitutes)?			
<b>Non-Personnel Costs</b>				
<b>Child Meals Cost</b>	What are the costs for child meals and kitchen supplies? This is expressed as a cost per child per day, which can include multiple snacks/meals.	Is the default Child Meals cost for your state correct, or do you want to override it and enter your own cost?		
<b>Child Participation Rate in Child Meals</b>	What is the participation rate for Child Meals? When estimating the cost for providing free meals for children, this allows users to establish participation rates other than 100%.			

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<b>Child Transportation Cost</b>	What are the cost per participating child to provide transportation to and from school?	Is the default Transportation cost for your state correct, or do you want to override it and enter your own cost?		
<b>Participation Rate in Child Transportation</b>	What is the participation rate among children for Child Transportation?	Is the default participation rate for your state correct, or do you want to override it and enter your own rate?		
<b>Education Supplies through Miscellaneous/Other Supplies and Equipment Costs (per Child)</b>	What is the annual cost, expressed on a per-child basis, for various categories of supplies and equipment. If users do not want to enter assumptions line by line, then the can assume a lump sum amount per child instead.			
<b>Occupancy Costs</b>	Is there a requirement for the minimum square feet per classroom in your program? What are the annual occupancy costs (expressed on a per-square-foot basis)? If users do not want to enter assumptions line by line, then the can assume a lump sum amount per child instead.	Is the default mortgage/lease cost per square foot for your state correct, or do you want to override it and enter your own rate?		
<b>Site Level Costs</b>	Are there additional costs incurred by providers at the site level, such as telephone/internet and accounting or legal support?	Some costs, such as internet service, are not driven by the number of children or classrooms.		

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<b>Other Direct Costs</b>				
<b>Child assessment costs</b>	What are the child assessment costs? This is stipulated at the provider level, not the state level, as part of Other Direct Costs to the provider.			
<b>Useful life [for replacement of depreciable items]</b>	What are the costs associated with useful life items/materials? This allows the user to estimate an annual cost to provider for periodically replacing classroom items and equipment			
<b>Indirect Costs</b>				
<b>Indirect Costs</b>	<p>What are the indirect costs? Many states allow providers to charge for additional indirect administrative costs (if needed); the prototypical example is a multi-site operator with centralized services, including administration, that must be covered, but a state program may allow all providers to stipulate “up to” a maximum indirect rate charge.</p> <p>States may also allow providers to include an annual allocation for contributing to their operating reserve funds.</p>			