



2024

CHILD CARE
MANAGEMENT
SOFTWARE
INDUSTRY
TRENDS REPORT



A Letter from Procure Solutions

CEO JoAnn Kintzel

When Procure Solutions conducted our second annual trends survey, we questioned over 100,000 stakeholders to gain a deeper understanding of their child care management software usage, as well as other technologies in place for their business operations.

But our questions delved deeper than software. We also wanted to better understand the obstacles being faced by providers to learn how we can best partner with them to help solve these pain points.

The data we received showed five main challenges: attaining optimal enrollment, collecting tuition, hiring and retaining staff, professional development and a lack of government funding and support.

This last challenge loomed large in 2023 as early childhood education programs around the country grappled with the end of pandemic-era funding for child care. States are being forced to consider whether to use their own dollars to continue some of the policies and programs created through the relief funds.

Procure Solutions is proud to support and promote the advocacy efforts of child care industry influencers such as the Early Care and Education Consortium, National Child Care Association, Child Care Aware of America and the National Association for the Education of Young Children to advocate for additional child care funding. We hope your center is taking advantage of help that is available to you, including a state-by-state list of resources we compiled that includes organizations that can assist you in finding available grants and funding, professional development opportunities and much more.

And we continue our work to find solutions to the other challenges in early childhood education identified through our comprehensive survey. Technology can help alleviate some of these pressures, yet our findings once again show that many centers are still relying on time-consuming methods to run their child care businesses.

We are honored to support you in your vital work and are thrilled to share the 2024 Child Care Management Software Industry Trends Report with you. We hope you can put this data to use to grow your business and educate young learners.

Thank you for your tireless dedication toward nurturing our future generations.

Sincerely,



JoAnn Kintzel
CEO of Procure Solutions

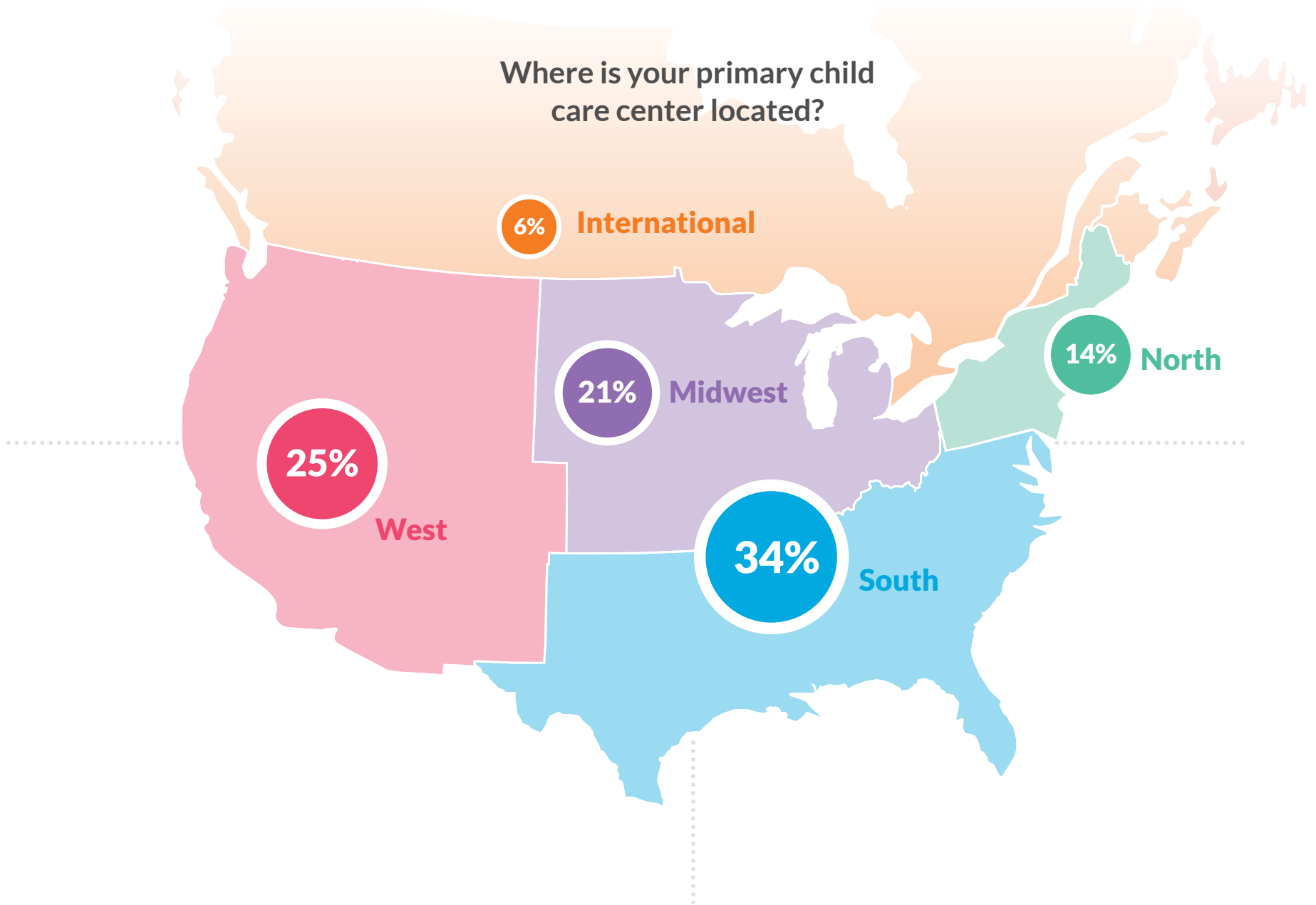




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Where is your primary child care center located?





Introduction

This report uses findings from a survey conducted by Procure Solutions in December 2023 on child care management software and other technology usage. It illustrates benchmarks and trends, and details how technology, especially automation, can put time back into child care providers' days.

Using the data obtained from thousands of stakeholders, child care leaders can better forecast their futures and make plans to grow their businesses.

To provide more context to the findings, Procure Solutions partnered with experts in several areas of early childhood education. Their shared knowledge will help child care providers assess their operations, as well as how they can improve the education they provide to young learners preparing for kindergarten.

This is the second report published by Procure Solutions identifying trends in child care management software. The biggest change

year-over-year was a dramatic uptick in how many centers reported being at optimal enrollment, which will be explored further in a later section.

The reason? Growth. The markedly increased enrollment numbers echo recent findings on market trends on early childhood education by EY-Parthenon, a leading market research and consulting firm in the education sector.

“The majority of centers report being back to or above pre-Covid enrollments. Of the centers that are still lagging on enrollment, many cite labor — not parent demand — as the constraint. While we anticipate that sector-wide enrollment may be flat for the next year or two, many individual centers are still poised for growth due to a significant supply-demand imbalance,” said Phil Vaccaro, partner/principal at [EY-Parthenon](#). “Overall spend on early childhood education is expected to grow at 4-5% through 2028, fueled by prices, even as increasing costs to families will continue to be a key challenge.”

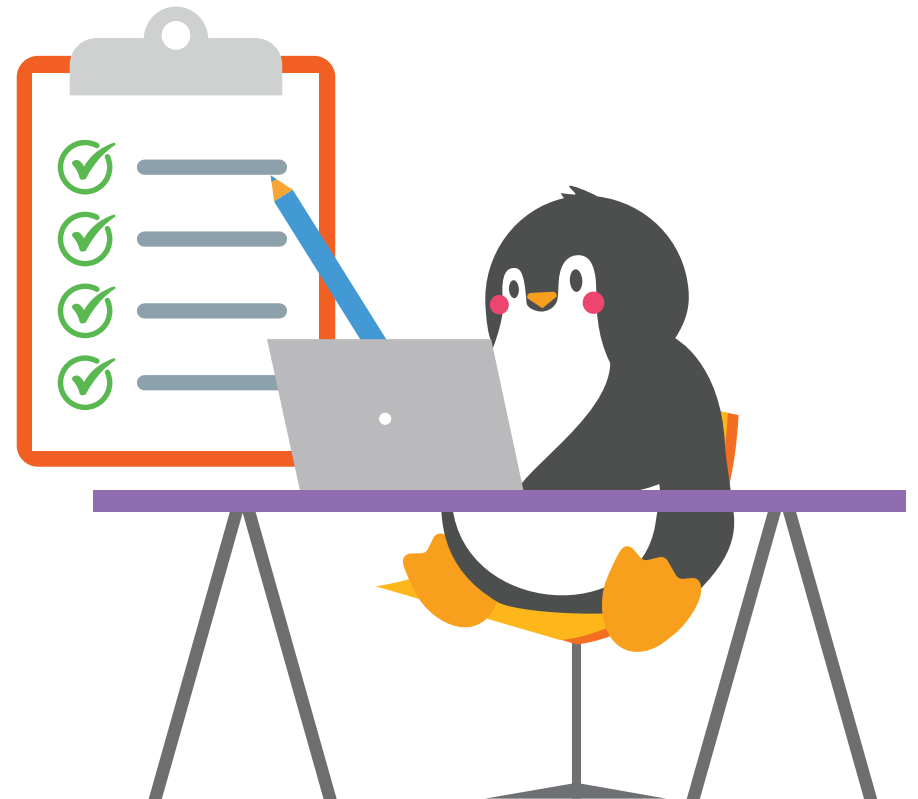
Methodology

Procare Solutions conducted a survey of more than 100,000 child care leaders, managers, teachers and other stakeholders in the early education space to better understand the current state of the industry regarding software usage.

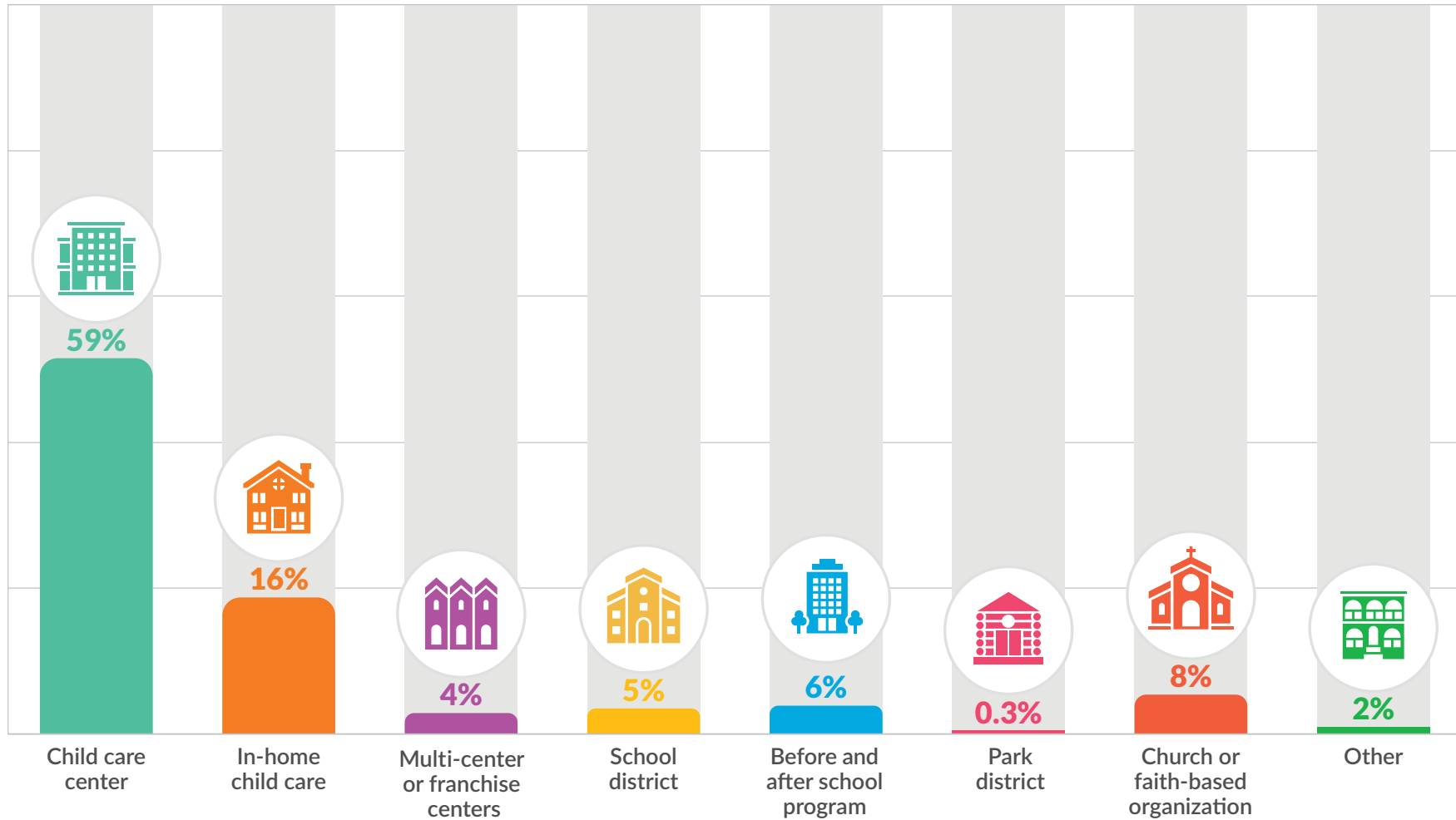
The link to the online survey was shared via email and on social media. Most respondents work at child care centers, accounting for about 60% of those who completed the survey.

Survey respondents spanned franchises and in-home daycares, as well as single and multi-site centers. This sampling gives a comprehensive look at the industry.

The report also includes the answers submitted by those affiliated with other organizations, including before and after school programs and faith-based programs.



Which of the following best describes your child care business?



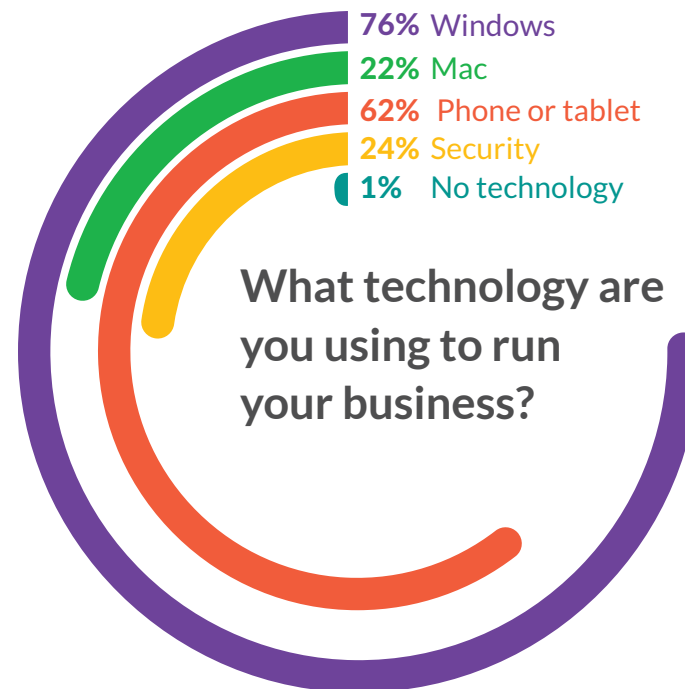
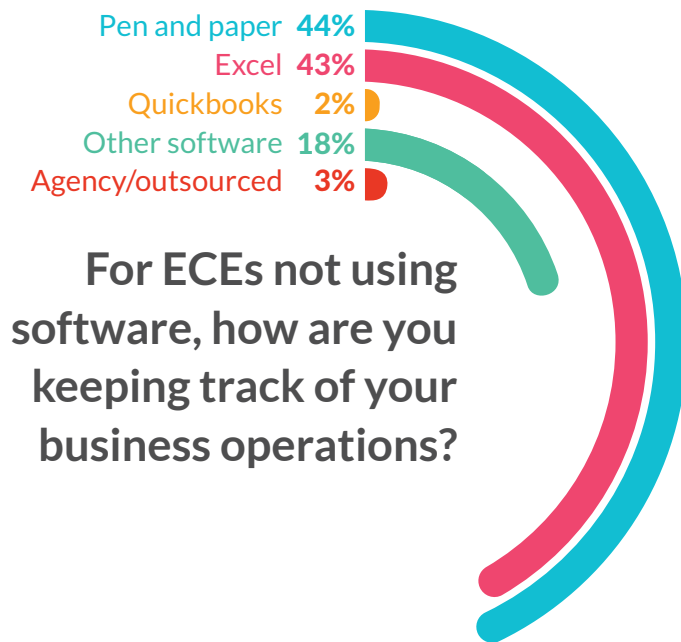
Embracing Software to Manage Child Care Programs

Chanie Wilschanski, an early childhood leadership coach and the CEO/founder of Schools of Excellence, points out that apprehension among child care owners and directors to adopt software often stems from a fear of the unknown and a reluctance to step out of their comfort zones.

“Despite the reluctance to invest time in learning new software, it’s crucial for them to overcome this hesitation and embrace the learning curve, as doing so can ultimately save time in the future,” said Chanie. “An essential aspect of successful software implementation is educating the staff on the reasons behind it and demonstrating how the technology can simplify their tasks.”

Chanie emphasizes the need for buy-in from staff regarding the benefits of software integration. Additionally, she recommends that center leaders create time in their schedules to ensure their staff feels supported throughout the learning process. Being available for questions and reducing their workloads in the short term as they take on this new software ensures a successful integration.

And not embracing technology has a direct link to struggles being endured at too many child care centers.



By embracing child care management software, center directors are able to automate routine tasks, simplify administrative processes and enhance communication with parents. This, in turn, leads to quality programs, increased parent satisfaction and better overall outcomes for children.



An essential aspect of successful software implementation is educating the staff on the reasons behind it and demonstrating how the technology can simplify their tasks.

- CHANIE WILSCHANSKI
CEO/ founder of
Schools of Excellence



Indicate your organization's plans to implement any of the following at your child care center:

Will implement within 12 to 24 months:





Major Challenges

Among the responses to the survey, four overarching challenges emerged that will be explored more deeply in this report:

Top 4 Major Challenges

Faced by
Child Care Centers
in 2024



Challenge #1

61%

of centers are struggling with hiring and retaining staff

Challenge #2

47%

of centers are struggling with enrollment, getting the right number of kids at all times

Challenge #3

30%

of centers need more professional development

Challenge #4

29%

of centers are struggling with the lack of public funding (grants, subsidies)



Enrollment and Staffing

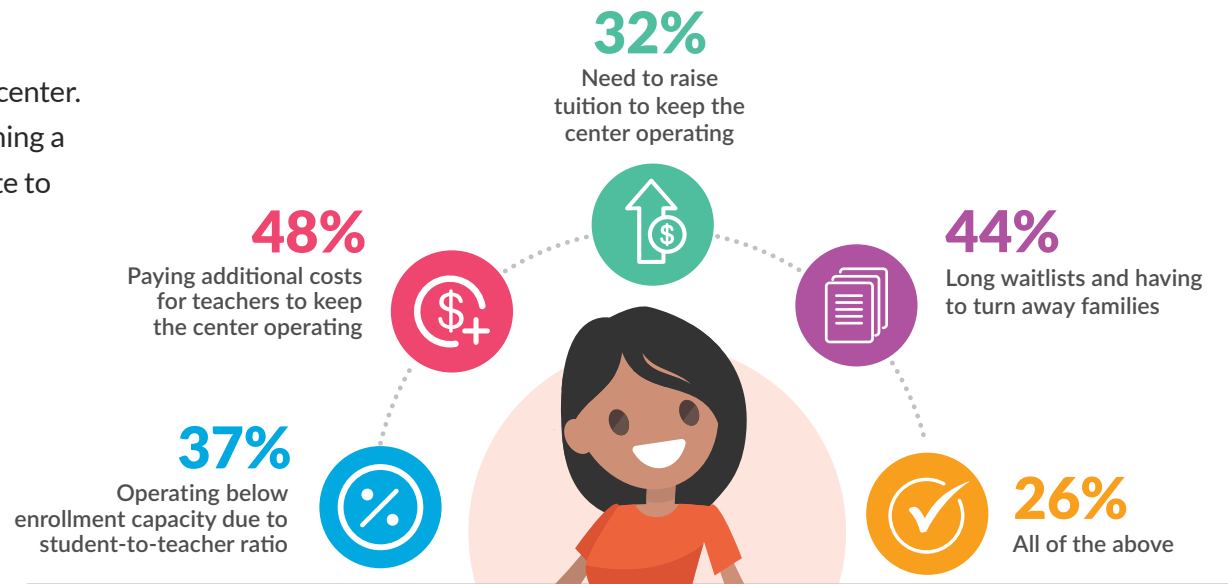
Enrollment and staffing are the lifeblood of any child care center. Ensuring a steady stream of enrolled children and maintaining a qualified and dedicated staff are key factors that contribute to the overall success of a center. This new research shows:

61%

of centers are struggling with hiring and retaining staff

47%

of centers are struggling with enrollment



What is the impact of staffing shortages at your ECE?

This year's survey saw an 11% spike in the number of respondents struggling with enrollment and registration, jumping from 36% to 47% in that time frame.

Running a successful child care center involves more than just providing quality care and education. Enrollment and staffing are two critical aspects that can greatly impact the success and sustainability of a child care center.

The child care industry has faced multiple challenges impacting enrollment, yet recent data presents positive developments in the capacity levels of centers, signaling a resilient sector poised for growth.

After significant drops in enrollment during the pandemic, enrollment has rebounded. Yet an astounding 58% of respondents to the previous Procure Solutions survey, which was conducted in late 2022, stated they had room for more children in their programs.

Yet just one year later, that number has completely shifted — 60% of centers now say they are at capacity and another 7% reported they are over capacity.

The rebound is impressive as only 33% of respondents are under-enrolled. “And centers must attain healthy enrollment before they can attain other measures of financial health,” said Kathy Ligon, founder and CEO of HINGE Advisors.

Streamlining the enrollment process is crucial to ensure a positive experience for both families and staff. Child care organizations can simplify procedures, provide clear instructions and offer online enrollment options to make the process convenient for busy families.

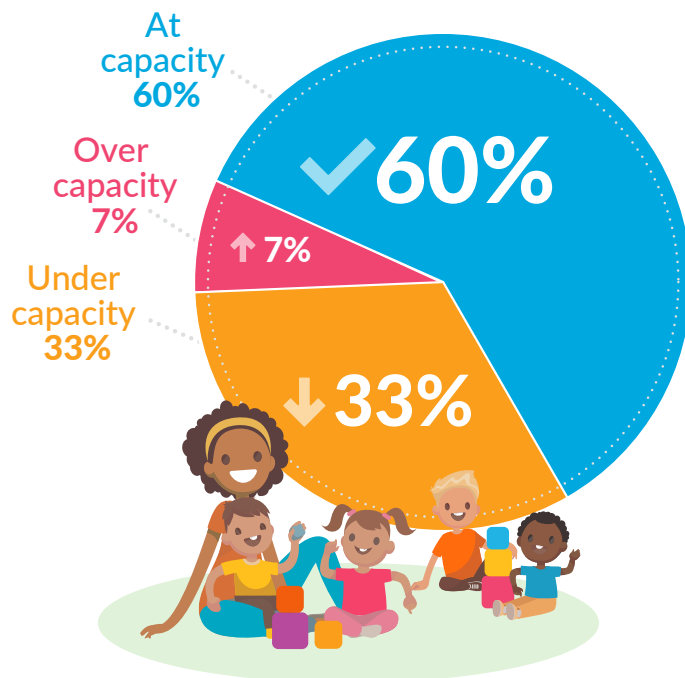
Waitlists are longest for infants and toddlers, she said, and tied to enrollment is balancing tuition rates and staff costs. One trend that Kathy is seeing is ending most tuition discounts, including reduced rates for siblings.

“The industry has largely gotten rid of discounts, with the exception of discounts for the children of staff,” she said. “I do recommend staff discounts because staff is hard to get.”

To understand how much revenue centers are losing to discounts, she suggests looking at billing systems to see discounts by age groups to see the financial impact of eliminating the discounts in conjunction with tuition rate increases.

Capacity levels at ECE centers

of children vs. max capacity



The industry has largely gotten rid of discounts, with the exception of discounts for the children of staff. I do recommend staff discounts because staff is hard to get.

- **KATHY LIGON**
CEO/ founder of
HINGE Advisors



Of course, enrollment is directly related to the ability to hire and retain staff. Using software can help centers identify key needs in staffing ratios and compliance, view historical trends reports and determine areas for improvement in hiring and retention processes.

“If you want to inspire growth and development on your team, consider how to build your leadership bench by adjusting your organization chart and create titles that give credit to the work being done,” said Beth Cannon, an ECE business leadership strategist and keynote speaker in the industry.



If you want to inspire growth and development on your team, consider how to build your leadership bench by adjusting your organization chart and create titles that give credit to the work being done.

- **BETH CANNON**

ECE business leadership strategist and keynote speaker



“What if you could take A-team players and give them stretch assignments, titles that inspire them and recognize the positive energy they bring to your organization?” she asked.

Job titles hold significant value to millennial and Generation Z professionals, according to [Business Insider](#). Beth points out that the term “assistant” may not resonate with an individual contributing as significantly as a director; therefore, it’s worth exploring the potential shift to titles like “program director” and “administration director” rather than the traditional pairing of a director and an assistant director.

“This is one of the most valuable positions on your staff,” Beth said. “If you have someone flexible and willing to be anywhere you need them, give them the credit they deserve and call them team support.”

Hiring and retaining qualified staff is vital for maintaining a high-quality child care center. Identifying your staffing needs and developing a comprehensive recruitment strategy are key steps in attracting talented employees. Child care centers can use job boards, social media and local networks to advertise job openings. Also, implementing retention strategies such as offering competitive salaries, providing professional development opportunities and creating a supportive work culture can enhance staff satisfaction and reduce turnover.

By staying adaptable to evolving needs, center can overcome enrollment challenges and build a qualified and dedicated team. Continuous evaluation, adaptation and a commitment to providing quality care will help centers thrive and make a positive impact on the lives of children and families.



Tuition Collection and Center Financials

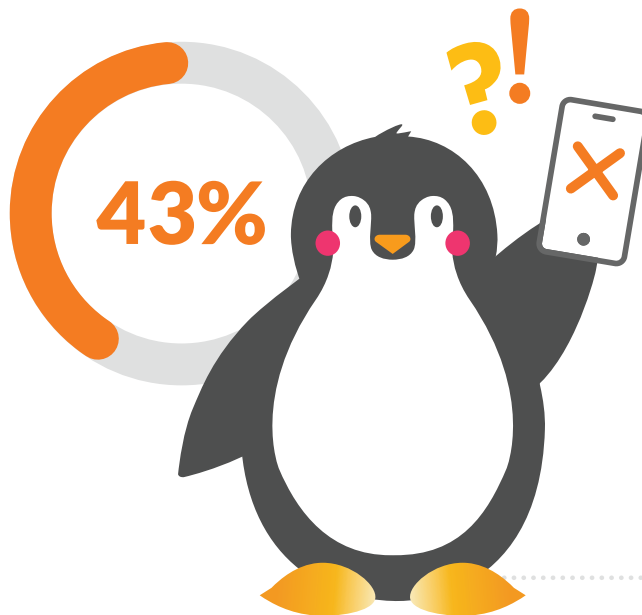
The security of data and financial information is also top of mind for child care providers. Over 82% of survey respondents believe that security is very important for managing family and staff information when evaluating and using technology at their centers.

Another statistic from the survey is that an astounding 43% of child care centers have experienced at least one rejected or declined transaction or bounced check when trying to collect tuition payments in the last month.

Yet about a quarter of respondents said they believed that paper checks are the most secure payment method, even as checks become an increasingly concerning security issue.

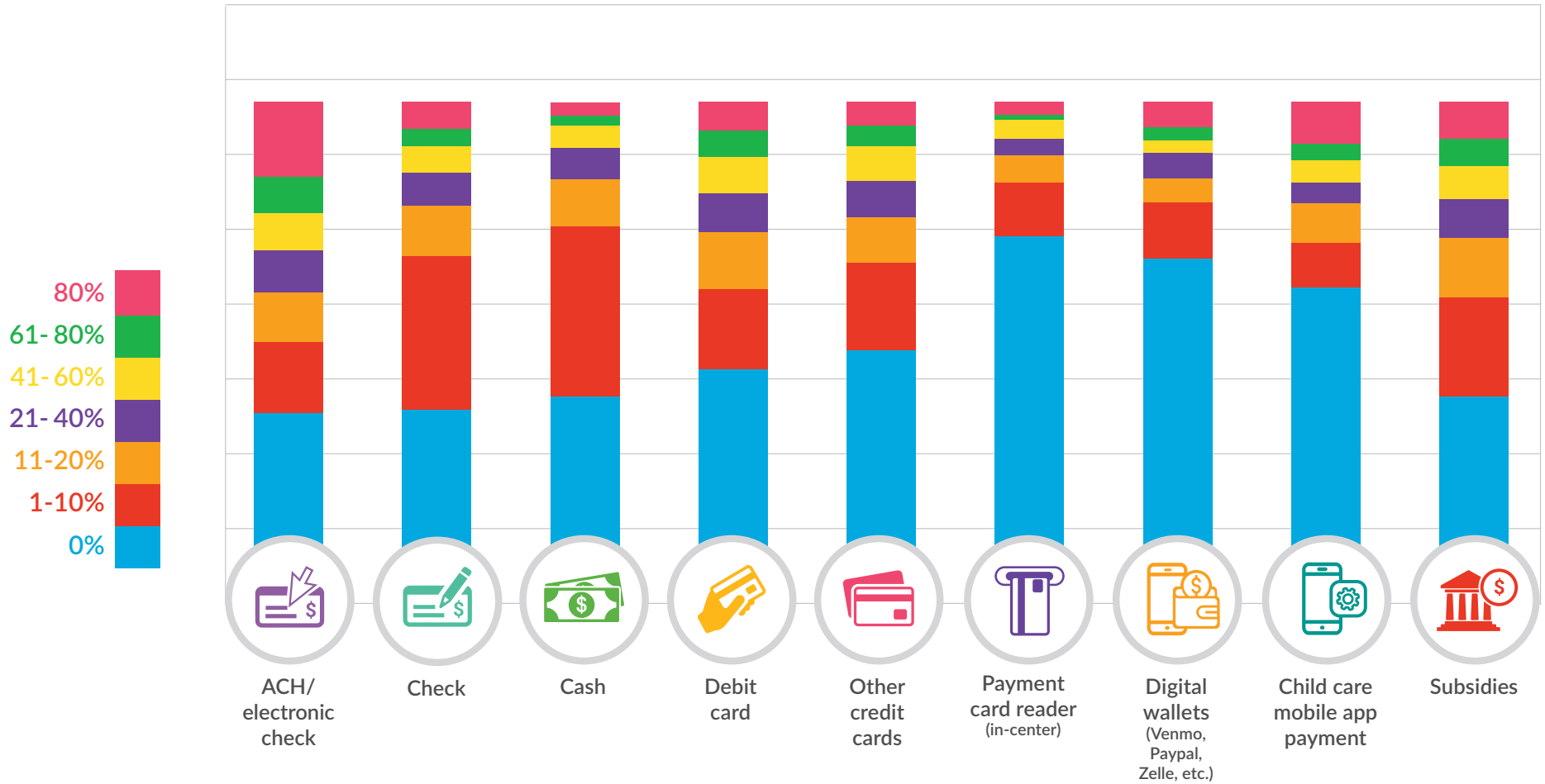
As check use has rapidly declined since the turn of the century, check fraud has risen sharply, particularly since the pandemic, according to a [2023 New York Times article about check fraud](#).

A similar number of respondents said they believed cash is the most secure payment method. However, only 12% of consumers prefer paying with cash, according to [Small Business Trends](#). And taking cash comes with a great deal of security risk.

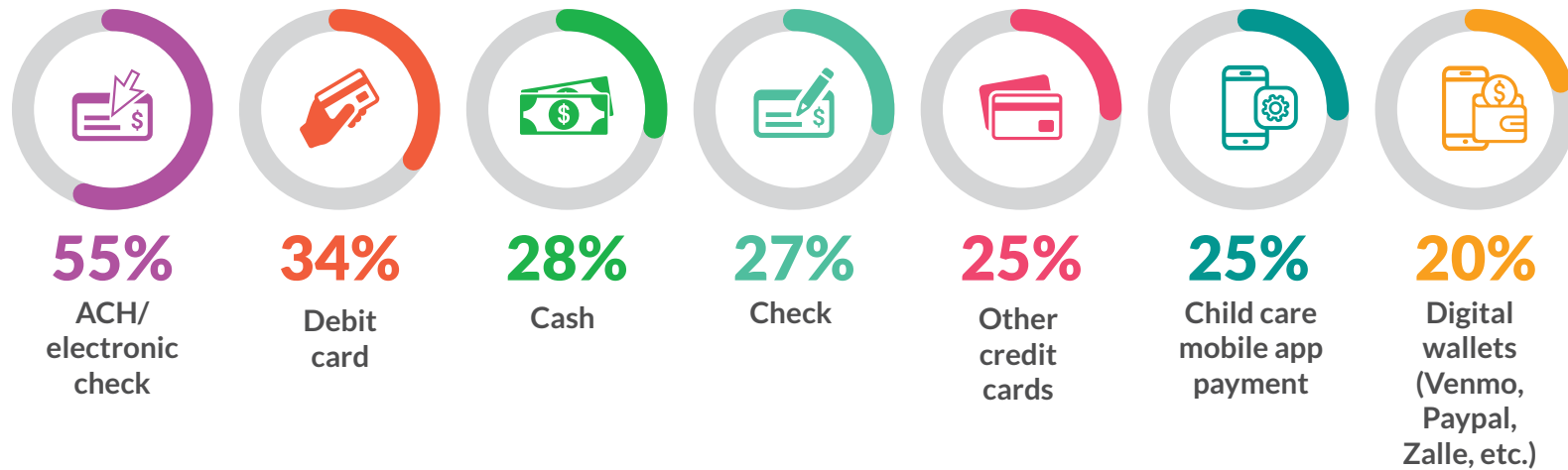


43% of child care centers have experienced at least **one rejected or declined transaction or bounced check** when trying to collect tuition payments.

What % of your parents/families use the following to make tuition payments?



Which payment method(s) do you feel are most secure?



For instance, child care businesses are at risk of being robbed if people find out they store large amounts of cash inside, and there is the potential for employee theft.

Cash payments require a great deal of recordkeeping and a meticulous storage system for the currency until it can get deposited in the bank. Plus, it complicates bookkeeping because there is no paper trail.

Credit or debit cards offer security features such as fraud protection to families. Many credit card companies monitor transactions for suspicious

activity and may provide additional layers of security like two-factor authentication, while allowing parents to accrue credit card rewards such as cashback offers or airline miles.

Offering card payments provides the option of accepting point-of-sale payments, such as at a center's front desk or a kiosk. It is a convenient way to collect payments, although not as simple as setting up recurring tuition payments using a debit or credit card.

Efficient and secure tuition collection and sound financial management are vital for the success of child care centers. Accepting cards provides chargeback protection to centers, as well as an immediate acknowledgement of sufficient funds, which eliminates bad debt and the possibility of ongoing collection efforts.

By implementing best practices, using technology and addressing common challenges, owners and directors can ensure a seamless and financially sustainable operation. Organizations should continuously evaluate and improve their tuition collection and financial management strategies to provide a solid foundation for growth and success.



Cash can be time consuming and costly. A study commissioned by Walgreens found that the company loses about \$1.3 million a year due to the time required for cashiers to hand out correct change to the penny. But with electronic payments, businesses can increase their customer base and their net transactions. For instance, by accepting cards, the Salvation Army “cashless kettles” average donation went from \$2 to around \$15 when using credit or debit, a 650% increase.

Source: [Electronic Payments Coalition](#)

2x

The increase that New York cab drivers saw in overall ridership, in increased revenue and tips over “pre-plastic” days.



Importance of Security and Compliance

In today's digital landscape, the security and confidentiality of family and staff information — including proper handling of credit card data, personally identifiable information and non-financial sensitive information — have taken center stage in the child care sector. Centers that prioritize these aspects showcase a commitment to trust and professionalism, a standard that parents and educators deeply appreciate.

Procare Solutions survey data underscores this trend, revealing that over 82% consider stringent security measures a top priority when selecting technology for their programs. By choosing software designed with robust security controls that include multi-factor authentication, strong privacy policies and SOC 2 Type II and PCI Level 1 certification, centers not only safeguard sensitive data but also strengthens their reputation as a credible and responsible institution.

How important is security for your parents and staff information when evaluating technology solutions for your center?



Over 82% feel that **security is very important** for family and staff information when evaluating and using technology at their centers

These security and compliance standards are also recognized by institutions around the world:



SOC 2 Type 2 -

From the American Institute of CPAs, SOC 2 certifies a product's security, availability, processing integrity, confidentiality and privacy. Type 2 is the more rigorous SOC 2 certification which means controls are reviewed, sampled and tested.



PCI Level 1 -

The Payment Card Industry Data Security Standard is used by major credit card providers to confirm a company's appropriate handling and surrounding business practices.

This level of diligence resonates with families, instilling confidence that their private information is handled with utmost care—a key advantage in building long-lasting relationships.



Procare Solutions is the only provider of child care management software that uses geofencing on contactless check-ins, which means that a person must be within a certain distance from your center to check in a child. That means a “bad actor” in another country, for instance, could not check a child in or out over the internet. And Procare is the only child care management software to earn the coveted SOC 2 certification.

Creating a Culture of Learning

In the bustling world of child care, each day poses new challenges and opportunities to shape the minds of our youngest learners. With this responsibility comes the importance of continuous growth. Professional development is the linchpin that holds together the fabric of successful child care centers – it not only sharpens the skills of educators but also ensures children receive the highest quality of care.

“Today’s child care workforce is getting younger and they want to be mentored,” said Caroline Jens, a child care consultant and founder of Child Care Biz Help.

That mentorship comes in different areas, both professionally and personally. Some younger generations may not have learned life-coping skills, and it’s up to center directors and owners to develop leaders with emotional intelligence while growing their talents.

“Career pathing is a big buzzword,” Caroline said, adding that many young employees don’t know what their career path will be. She said to remember that younger generations don’t have the experience of older generations in handling lesson planning and assessments.



Today’s child care workforce is getting younger and they want to be mentored.

- **CAROLINE JENS**
Founder of Child Care Biz Help



They’re craving mentorship while learning about accountability, which means a rewards system is a good incentive to acclimate them to their new roles in child care.

- **KATHE PETCHEL**
Business Development Specialist, at HINGE Advisors



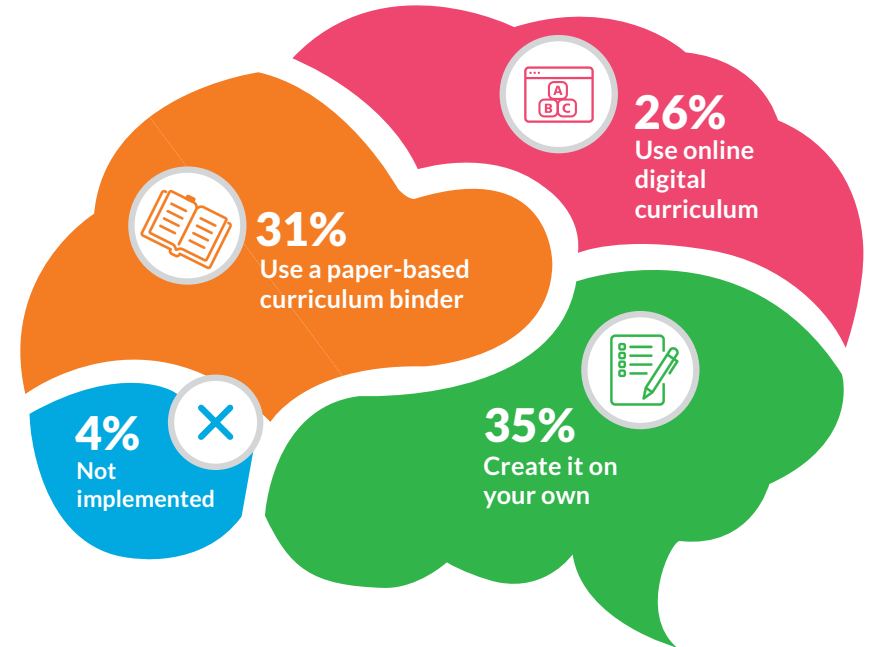
“Those in Generation Z, those born between 1997 and 2012, often don’t have the job experience of past generations due to the pandemic,” said Kathe Petchel, a business development specialist at HINGE Early Education.

“They’re craving mentorship while learning about accountability, which means a rewards system is a good incentive to acclimate them to their new roles in child care,” she said.

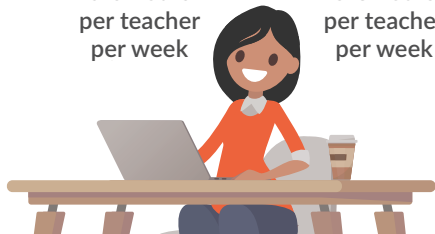
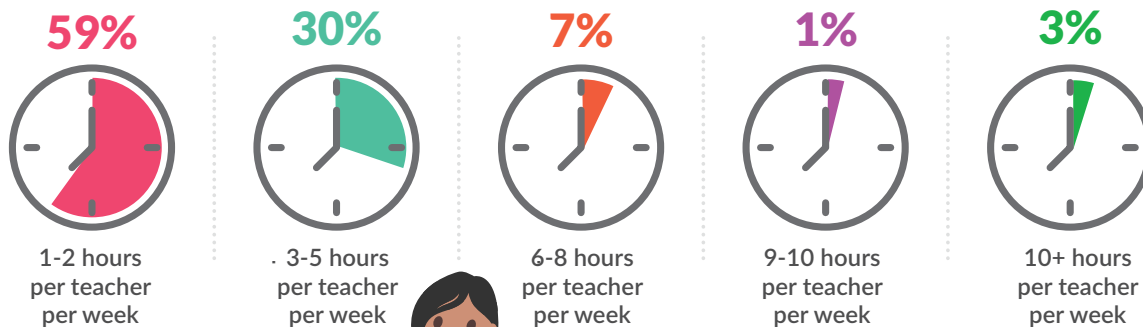
She also says not to give up on older employees who left child care during the pandemic. Many are now looking for flexible jobs with part-time hours that directors can tap into to help fill staffing gaps.

About 30% of survey respondents said each teacher spends between three and five hours a week doing lesson planning, and a similar percentage noted their centers create their own curriculum.

How do you implement curriculum at your center?



How long does it take each of your teachers to put together lesson plans per week?



This leads to stress among teachers and other staff, who already are dealing with more children with challenging behaviors.

Perna Richards, founder of Together We Grow and an ECE consultant, said the children are absorbing the stress of the grownups around them.

“Children are emotional detectives, constantly scanning their environment,” she said.

She encourages center leaders to put more emphasis on mental wellbeing and social skills, and to give teachers the tools they need while creating a safe and loving school family.

“Our silence is our permission,” she said. “When we refrain from holding staff accountable for behaviors that are not in the best interests of children, and we fear that addressing these issues may lead to a teacher quitting, we operate from a perspective of fear. This fear-based approach adversely impacts teachers who are genuinely striving to perform their best and uphold ethical standards.”

Professional development is not just beneficial; it’s imperative. Child care organizations need to empower educators with the tools to advance their skill set and stay at the forefront of child care best practices.

This commitment to continuous growth translates directly to higher-quality care, fostering an environment where both teachers and children thrive. Backed by testimonials from industry professionals and concrete performance statistics, there is an undeniable connection between teacher development and successful learning outcomes.



Children are absorbing the stress of the grownups around them.

- **PRERNA RICHARDS**
Founder of Together We Grow



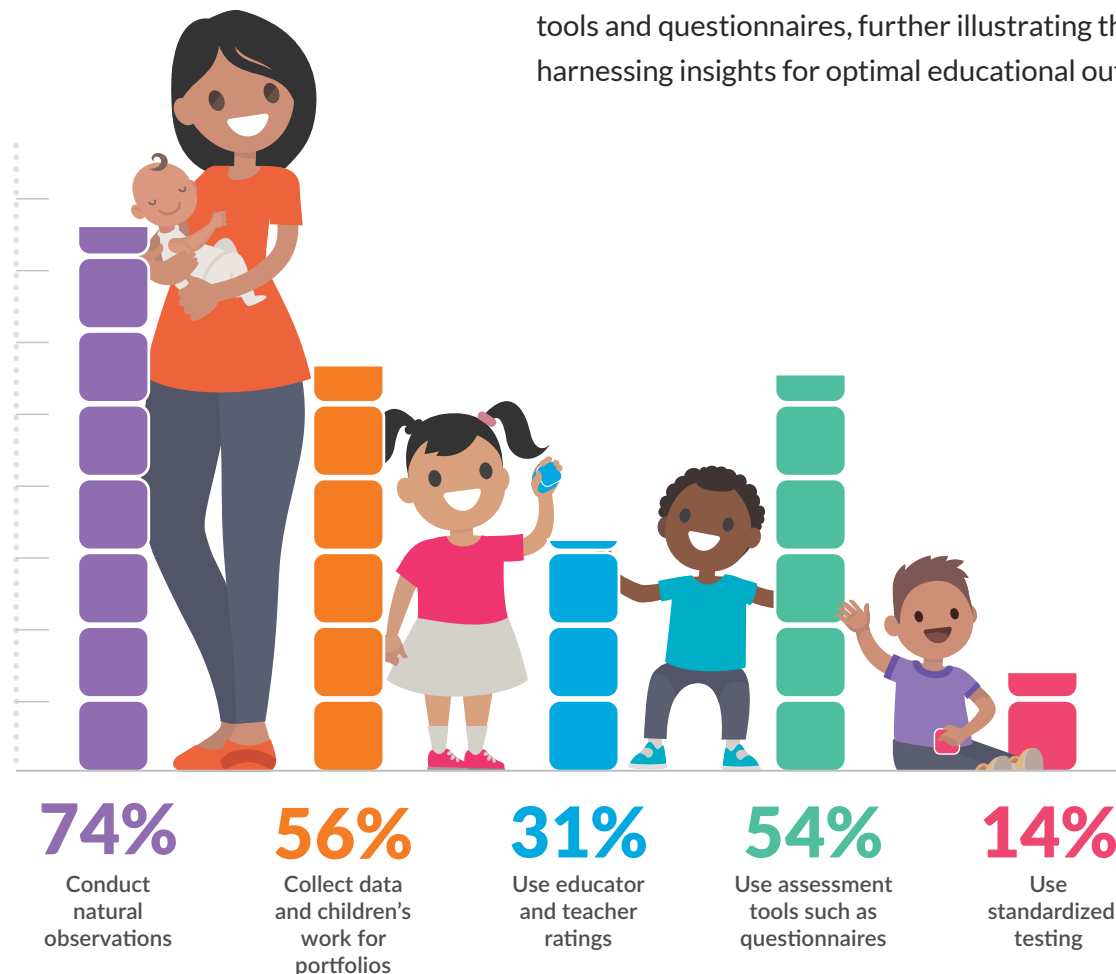


Assessing and Communicating the Impact of Development

Assessing and communicating the impact of milestone development in child care centers is a commitment to the elevation of early childhood education.

A significant 74% of educators who responded to the survey shared that they conduct regular natural observations of the children in their care, ensuring personalized attention and development tracking. Beyond observation, more than half of these respondents (56%) take an evidence-based approach by gathering data and children's work for robust portfolios. About 54% also incorporate structured assessment tools and questionnaires, further illustrating the sector's dedication to harnessing insights for optimal educational outcomes.

How are you assessing the developmental growth of the children in your care today?



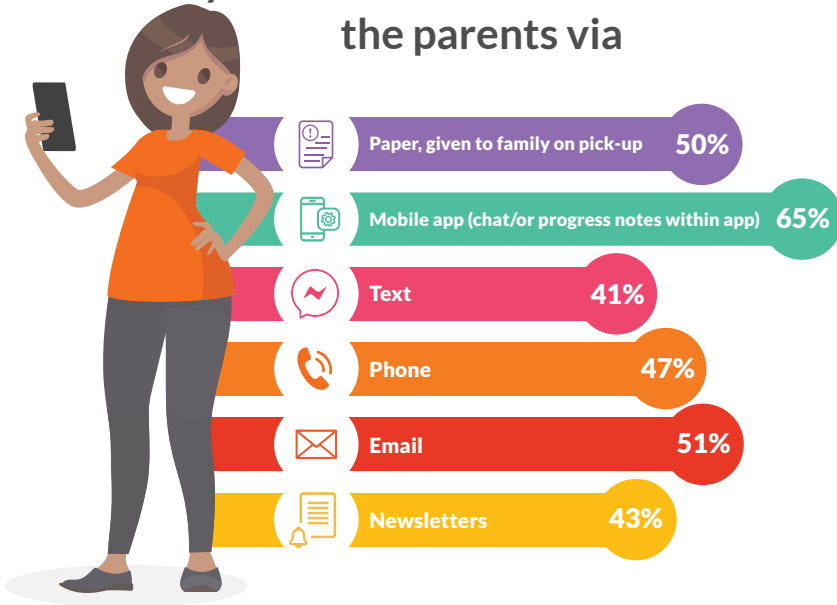
These assessments, as indicated by sources such as the [New York State Department of Health](#) and the [National Association for the Education of Young Children](#), are instrumental in identifying areas such as cognition, communication and social skills. They offer early detection of potential challenges and facilitate timely interventions.

By keeping a close watch and consistently monitoring each child's individual journey, educators play a critical role in laying the groundwork for their future learning and successes.

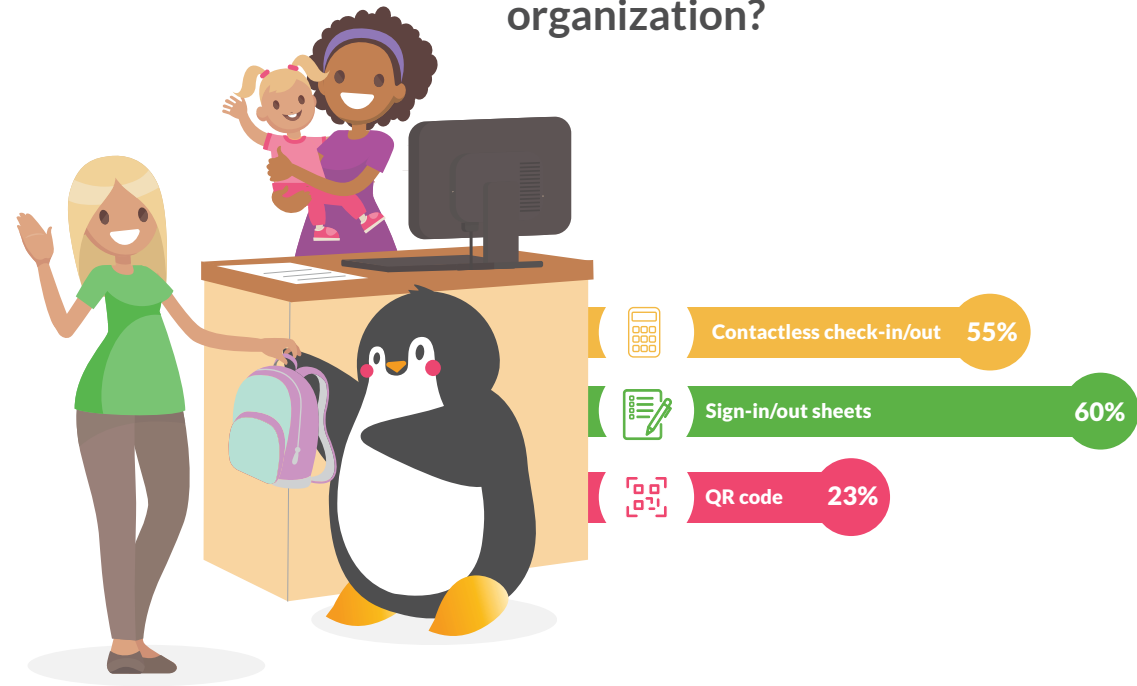
And the communication of a child's developmental milestones and assessments to families is an indispensable component of effective child care management. By employing software designed for streamlined sharing of these evaluations, educators not only reinforce transparency but also foster a collaborative environment with families.

Research indicates that regular, clear communication bolsters parental involvement, which is crucial to the child's growth and learning journey. With the right tools, early education professionals can succinctly convey progress, address concerns and celebrate achievements, thereby building a foundation of trust and engagement that resonates throughout the educational experience.

Do your teachers communicate with the parents via



How do you track attendance at your organization?



Impact of the Funding Cliff

Nearly 30%

of respondents to the survey cited a lack of government funding as a major challenge

As a result of the pandemic, Congress invested over \$50 billion dollars in the child care industry. And on September 30, 2023, most of this funding expired, including \$24 billion in one-time stabilization funding.

“The one-time federal relief funding was crucial in stabilizing the industry during the pandemic. States are now being forced to consider whether to use their own dollars to continue some of the policies and programs created through the relief funds, or whether they let some of the progress lapse,” said Radha Mohan, executive director of the [Early Care and Education Consortium](#).

A number of states permanently raised reimbursement rates or committed to multi-year increases.

“That’s huge, because without high enough reimbursement rates, providers cannot participate in these programs,” she said. “Additionally, some states are also continuing compensation programs for teachers and creating flexible grant programs to ensure sustainable solutions. These investments are critical since teachers are key to the success of any program.”

Each state has a primary agency or organization responsible for subsidizing child care programs through federal and state grants, and there are many others including CCR&Rs, shared services organizations, ECE community leaders and regional [National Association for the Education of Young Children](#) affiliates that offer child care programs and services to help centers provide sustainable child care programs.

“One of my favorite examples is how a number of states are investing in the child care for teachers,” said Kathy Ligon. “Not only does this help the teachers to have free child care, but centers are able to still receive full tuition and market that to help with staff recruiting and retention.”



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- KATHY LIGON
CEO/ Founder of
HINGE Advisors

Child care organizations can be proactive in obtaining grants and additional funding by reviewing [this state-by-state list to see what resources are available](#) to help fund programs. This can be achieved by participating in initiatives that promote the importance of child care and its role in community development, as well as joining state child care associations or other groups advocating for financial support and reach out to local legislators.



67.8%

Percentage of children under age 6 who have all available parents in the workforce

2.7M

Number of parents across the United States who report making job changes due to issues with child care

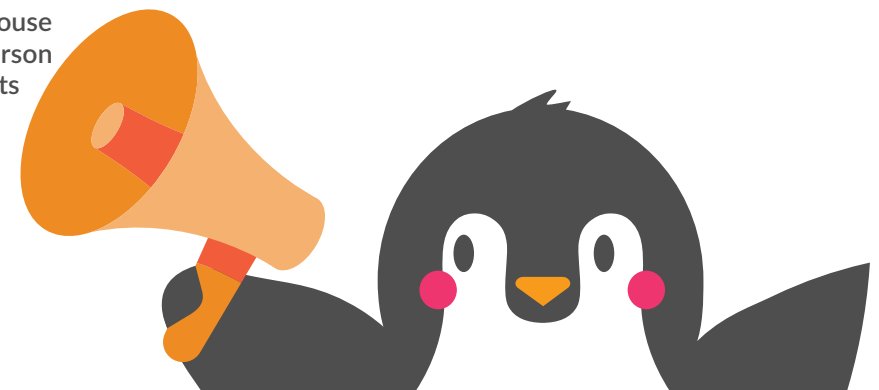
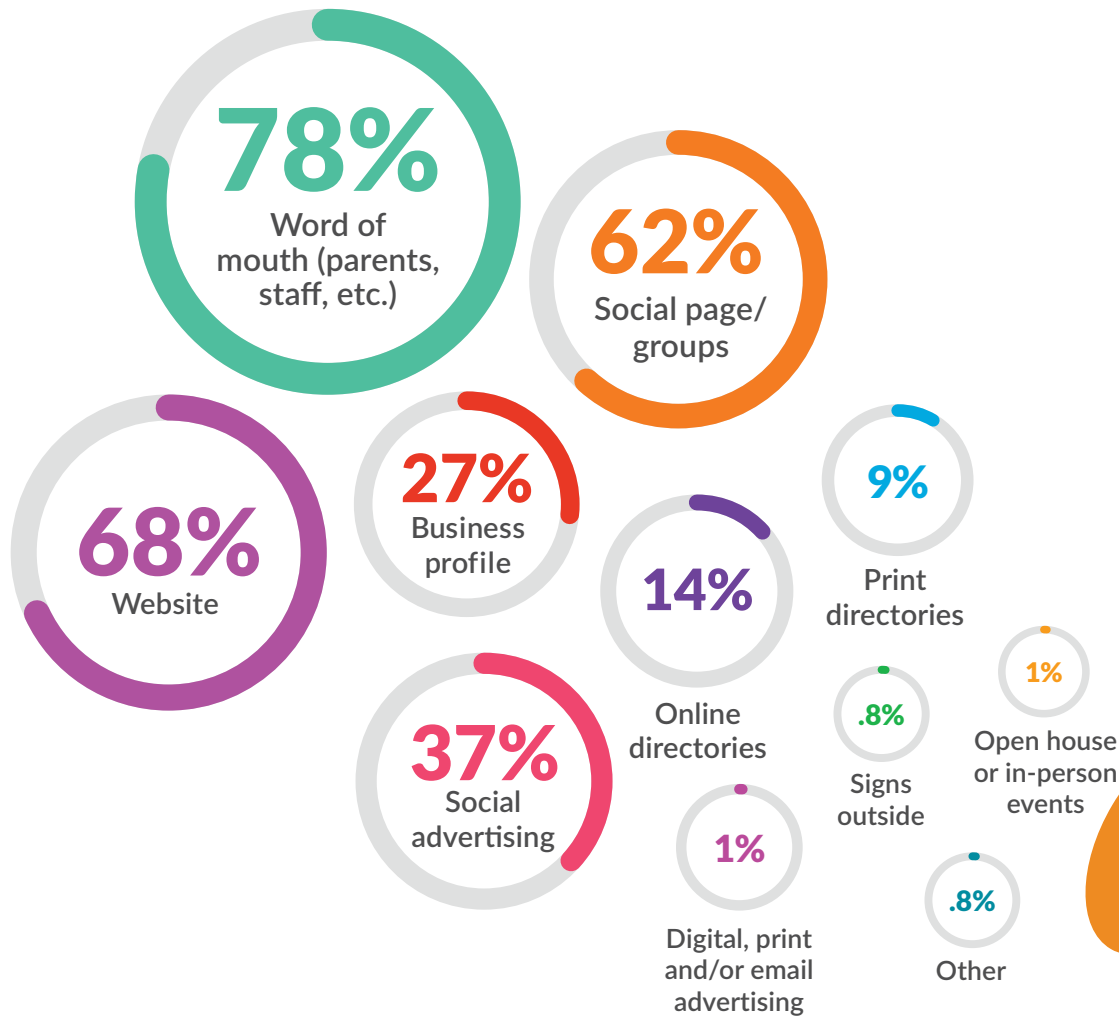
Source: American Progress



Marketing Your Center

In today's digital age, effective marketing plays a crucial role in the success of child care organizations. With the increasing reliance on technology and social media, it's essential for center administrators,

educators, teachers, owners and directors to leverage the power of social media platforms to reach and engage their target audience, as well as to learn and find valuable content about the child care industry.



According to the survey results, a significant 78% of respondents lean on the power of referrals, with 68% funneling prospective clients to their website and 62% using their social media presence for promotion.

When it comes to social media platforms, it's important to choose the ones that align with each business's marketing goals and target audience. Below are several key platforms that can effectively highlight an ECE center's offerings while also serving as a source for invaluable content:

Which social media sites do you go to for ECE content?





Facebook

With its extensive user base, Facebook is an excellent platform for sharing updates, photos, videos and engaging with a center's community. According to the survey, 62% of ECE professionals rely on Facebook for ECE content.



Instagram

Instagram's visually oriented nature makes it ideal for showcasing the vibrant and engaging environment of an ECE center. Share photos, videos and stories that highlight programs, activities and happy moments.



Pinterest

Pinterest is a treasure trove of inspiration and ideas. Create boards that feature educational activities, parenting tips and resources that parents can explore. According to the survey, about 32% of ECE professionals find Pinterest to be a valuable platform for ECE content.



YouTube

Recognized as one of the world's largest video-sharing platforms, YouTube provides a unique avenue for ECE centers to connect with families and educators. It also allows for the integration of educational content that can be an extension of your center's curriculum, engaging children and parents alike.



LinkedIn

Share articles, insights and professional achievements to establish expertise and expand professional networks. Additionally, LinkedIn serves as an excellent tool for hiring, opening up opportunities to connect with potential candidates and explore their qualifications and experiences.



X, formerly known as Twitter

Share short and concise updates, announcements and educational resources. Engage with other professionals, organizations and parents by joining relevant conversations and using hashtags.

Embracing the power of social media elevates child care centers and makes a lasting impact on the lives of children and families.



Conclusion

In an era where the potential of technology in child care is immense, many programs still hesitate to leverage it for educating children and streamlining business operations. This latest report identifies challenges such as staffing and enrollment that are prevalent across both large and small child care programs.

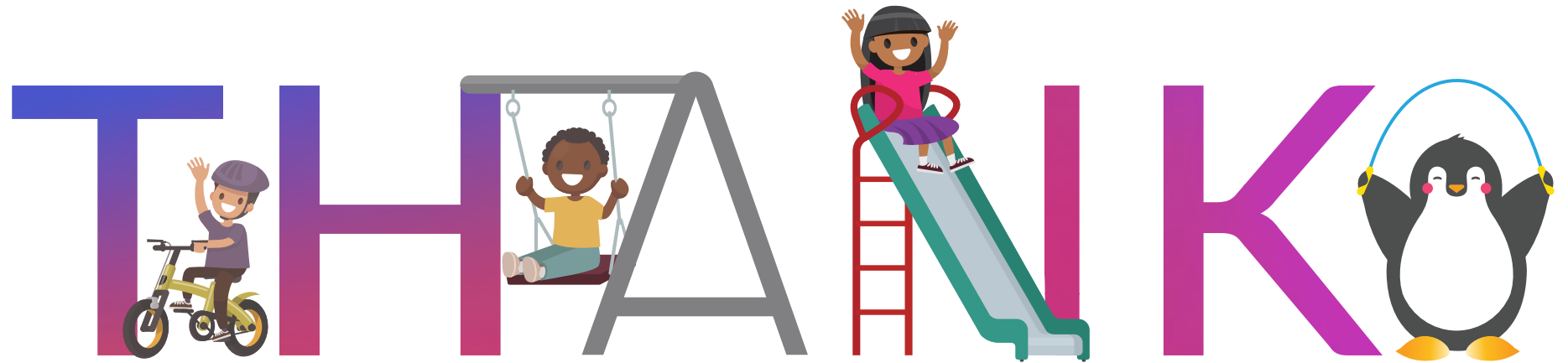
Adopting software solutions is no longer a luxury—it's a strategic necessity to address today's needs while paving the way for sustainable growth. It's imperative that child care providers equip themselves to meet the evolving expectations of modern parents.

Recognizing the indispensable role early childhood educators play in shaping the nation's future, Procure Solutions is dedicated to empowering these professionals. Our mission extends beyond mere support; we aim to be a catalyst for every center to achieve its aspirations.

Procure is designed to be both cost-effective and comprehensive, mitigating additional technology expenses. In an environment where center administrators are often asked to accomplish more with fewer resources, our goal is to alleviate the operational pressures they face daily, so they can remain focused on their most important work — nurturing young minds.



To learn more about how Procure can help you manage your child care organization and programs, please visit: procaresolutions.com



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