

# Working in Early Care and Education in North Carolina



**2015  
Workforce Study**

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Child Care Services Association



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# Introduction



With funding from the Division of Child Development and Early Education, through a Race to the Top Early Learning Challenge Grant, Child Care Services Association (CCSA) conducted a statewide survey of the early care and education workforce in North Carolina from January 2015 through September 2015. This study provides comprehensive data on teachers, assistant teachers, and directors in early care and education centers and on the licensed early care and education programs in which they work. Licensed centers include programs operated by public schools, for-profit entities, and not-for-profit entities, including Head Start. Additional information from similar studies conducted by CCSA in 2011 - 2014 is also provided. Comparison of the data from these surveys enables readers to learn about the continuities and changes in the early care and education (ECE) system and workforce that may have occurred over this time period between 2011-2015. This report also references data from the 2001 and 2003 CCSA workforce studies to provide a perspective on changes over a longer period of time.

## Working in Early Care & Education in North Carolina 2015 Workforce Study

Data for the center-based workforce report were collected through two linked surveys of samples of early childhood program directors and of teachers working in those programs conducted from January 2015 through September 2015 (based on information as of January 2015<sup>1</sup>). Useable surveys were obtained from 761 directors who constituted 71% of a stratified random sample (n=1075) of all

directors of licensed child care programs in North Carolina. This response constitutes about 19% of the population of all early care and education programs serving children birth through five in the state. The sample was designed to include 25% of the programs within each of the 14 Child Care Resource and Referral (CCR&R) regions. A map of the regions can be found in Appendix A. Directors in the sample were asked to distribute surveys to their teaching staff. For those directors who returned their surveys, multiple efforts were made to secure surveys from their teaching staff and useable surveys were returned by 3,078 of those teachers and assistant teachers out of an estimated 5,957 in the participating centers (52%). An additional 300 surveys were returned from teachers and assistants whose directors did not return surveys.

Program level and teacher level data have been weighted to reflect the statewide populations of centers and teaching staff respectively, adjusting for known individual, program, and community characteristics associated with response bias. These factors include the location, size, sponsorship, and star rating of a program as well as previous participation in a CCSA survey. Most percentages and other values reported in text, tables, and graphs incorporate these sampling weights, permitting extrapolation to the population of centers (N=4,095) serving children under six who are not yet in school. In addition, the teaching staff survey data were weighted in such a way as to account for the effects of non-response not only at the teaching staff level but also to account for non-response among centers. Fortunately most (78%) of the 761 centers whose directors returned their own surveys also yielded at least some teacher surveys. The size of the teaching staff of each center was initially estimated from the licensed file sampling frame and this number was altered if director survey responses and/or phone calls to the center director yielded an estimated number that was different from what was reported on the license file. Teaching staff survey participation rates at the 761 centers for which we have director surveys ranged widely with a mean teaching staff response rate of 53% and a median of 57% which is noticeably higher than surveys in previous years. About 22% of centers yielded no teaching staff surveys, while in another 22% of cases, surveys were returned from the entire teaching staff. About 17% of these centers yielded some responses, but from only a minority of the teaching staff (i.e., 1% to 44%), while around half (45% to 64%) of the teaching staff returned surveys in another 15% of cases. Finally in about 21% of these centers, a sizable majority (65% to 99%) of teaching staff returned surveys. Initial teaching staff weights were calculated as the inverse of the response rate at each center.

Because of this situation, information from the directors' surveys was used to assess how center and director characteristics might have affected response levels from the teaching staff. Among the relevant factors investigated, location, size, sponsorship, star-rating, and designation as a NC Pre-Kindergarten site affected teacher survey response. A number of teaching staff surveys (N=300) were returned from a small number of centers (N=77) whose directors did not respond. This year, these responses were used in the overall pool of responses used to generate estimates of the

<sup>1</sup> Data from NC Division of Child Development and Early Education (DCDEE), January, 2015.

teacher workforce. As a result, second stage weights were applied and adjusted for the differential response associated with these center characteristics. This multi-level weighting process gives us further confidence that the results from 3,378 teaching staff surveys completed and returned in 2015 can be statistically generalized to the statewide population of early childhood teaching staff that is estimated to consist of about 30,355 individuals. The final weights for teachers were adjusted by top-coding extreme values by using the Tukey fence technique, and rescaling the totals to generate an estimated population of 30,355 cases. This affected fewer than 3% of the cases.

More information about the sampling design and survey execution is contained in Appendix B to this report.

Throughout this report, the median value is usually reported as the measure of central tendency, e.g., for hourly wages and time intervals. As such, “average” is used interchangeably with “median” unless specifically noted otherwise.

A feature of the workforce study this year involved continuing the capacity to conduct longitudinal studies in the future through the establishment of a special panel of centers. This panel consists of a subset of centers from which data has been collected over several years. In order to construct this panel, all centers which had responded to CCSA workforce surveys in 2011, 2012, 2013 and 2014, along with an additional random sample of centers represented in the 2015 survey, were included in the group of centers invited to participate in the 2015 survey. Panel data from the 2011, 2012, 2013, 2014, and 2015 surveys will be available for examination to enable longitudinal analyses. Additional information about the sampling design and survey execution is contained in Appendix B to this report. Further information is available upon request.





## Early Care and Education (ECE) Centers

**Star Rating, Organizational Structure, and Regional Differences.** Across the state, the distribution of early childhood programs varies considerably by star rating levels, size, and sponsorship. **Table 1** displays the regional distribution of programs. Examining the first row of this table reveals that at the time the sample for this workforce study was developed, there were 4,095 centers serving more than 172,000 children birth through five. Only about 17% of the programs (serving about 15% of the total enrollment of this age group in center based care) are rated as having 2-stars or fewer. This group includes not only 1- and 2-star licensed centers, but also GS-110 (Notice of Compliance centers) and those with a temporary, provisional, or probationary license. Another 18% of programs in the state have 3-stars and serve about 13% of children birth through five enrolled in programs. Four-star programs constitute about 24% of the programs in the state and also serve about 23% of enrolled children birth through five. Finally, about 42% of centers

**Table 1**  
**Regional Distribution of Centers by Star Rating, Type of Organization, and Capacity, 2015**

	Capacity	Star Rating of Program				Type of Organization		
	Number of Programs	Under 3 Stars	3 Stars	4 Stars	5 Stars	For-Profit	Not-For-Profit	Public or Quasi-Public
Statewide	4,095	17%	18%	24%	42%	56%	21%	23%
Region 1	108	19%	19%	27%	35%	49%	25%	26%
Region 2	76	20%	18%	13%	49%	54%	26%	20%
Region 3	215	19%	17%	18%	46%	55%	21%	24%
Region 4	226	15%	25%	23%	37%	60%	16%	24%
Region 5	455	17%	25%	27%	31%	52%	21%	27%
Region 6	571	16%	12%	30%	43%	70%	21%	9%
Region 7	227	14%	12%	26%	48%	52%	20%	28%
Region 8	274	14%	11%	23%	52%	34%	32%	33%
Region 9	200	11%	21%	19%	50%	42%	20%	39%
Region 10	304	17%	16%	19%	48%	40%	24%	36%
Region 11	353	24%	22%	22%	33%	54%	20%	26%
Region 12	695	16%	17%	22%	46%	68%	18%	13%
Region 13	256	16%	25%	25%	33%	58%	20%	22%
Region 14	135	16%	18%	24%	43%	48%	22%	30%

Source: DCDEE files and survey data

have the highest 5-star rating and serve about 50% of all children in licensed centers, or almost 86,000 birth through five year olds. See **Tables 1 and 2**. An increase in quality of care as measured by star level has occurred since 2011. At that time, 23% of programs serving 20% of children birth through five were rated as having 2-stars or fewer. At the other end of the quality scale, 56% of programs enrolling 63% of children in this age group had 4- or 5-stars.

The most prevalent organizational form represented in North Carolina is the for-profit center consisting of 56% of all centers (58% of total birth through five enrollment in centers). Non-profit programs constitute about 21% of all programs, but serve proportionately more children with 24% of birth through five enrollees in this type of center care. The remaining approximately one in five centers (23%) is characterized as a public or quasi-public form of organization,

and about 18% of the enrolled birth through five population is served by these programs. See **Tables 1 and 2**. This compares to 54% of programs being for profit (54% enrollment), 24% non-profit (27% enrollment) and the remaining 22% of programs being publicly sponsored (19% enrollment) in 2011.

An important feature of North Carolina ECE organizations and workforce has to do with regional variation. The state, which has 100 counties, has been divided into 14 multi-county Child Care Resource and Referral (CCR&R) regions that vary substantially in terms of their resources and scale. See Appendix A. The smallest region (Region 2) has only 76 centers serving fewer than 3,000 children altogether, while the largest (Region 12) has almost 700 programs serving over 34,000 children. This 10-fold difference in scale of regions also reflects a wide variation in the socio-economic and demographic characteristics of these different regions with important implications for the supply, quality, and status of ECE programs and the educational levels and wages of the ECE workforce. In general, more urbanized regions have more centers and serve larger numbers of preschool children, while the smaller, more rural and isolated regions have fewer numbers of programs, as well as fewer children and staff.

The quality ratings of programs differ substantially by region, with some, but not all, of the more rural, smaller regions lagging behind. See **Table 1**. For example, although only 17% of programs have under 3-stars across the whole state, regions differ from a low of 11% in Region 9 to a high of 24% in Region 11. At the other end of the scale, it should be noted that although 42% of the programs in the state are rated as 5-star, regions vary from a low of 31% (Region 5) to a high of 52% (Region 8). Both Region 8 and Region 9 have half or more of their programs at this highest level of care.

Enrollment by region follows this same pattern. See **Table 2**. Statewide only about one in seven children are enrolled in programs with fewer than three stars, but only 6% of children receive care in such settings in Region 9. Yet in some regions of the state, i.e., Regions 3 and 11, closer to one in five children are enrolled in such programs, 18% and 19% respectively. Conversely, although right at 50% of children in licensed center-based care statewide are enrolled in 5-star programs, in 6 regions more than 50% of children are receiving this highest rated level of care. These include Regions 2, 3, 6, 8, 9, and 12. Region 5 has the lowest number of children enrolled in 5-star care at 37%.

There is also substantial variation across the state in how programs are organized. See **Table 1**. For-profit programs can comprise 70% of programs as in Region 6 or as few as 34% as in Region 8. Similarly, non-profits range from 32% of the programs in Region 8 to just 16% in Region 4. Finally, although about one out of every four programs is sponsored by public or quasi-public organizations, including public schools and some Head Start programs across the state, these programs represent 39% of the centers in Region 9 yet only 9% in Region 6. These differences can affect conditions of the workforce such as salaries and benefits.

In a similar fashion, children in different regions are enrolled in programs with different kinds of organizational structures. See **Table 2**. Statewide, about 58% of children are served by for-profit centers, 24% by not-for-profit centers, and about 18% by public or quasi-public organizations. Although most children are receiving care in for-profit centers, this varies widely by region

**Table 2**  
**Birth to Five Enrollment in Centers by Star Rating and Type of Organization, 2015**

Region	Total	Star Rating of Program				Type of Organization		
		Under 3 Stars	3 Stars	4 Stars	5 Stars	For-Profit	Not-For-Profit	Public or Quasi-Public
Statewide	172,171	15%	13%	23%	50%	58%	24%	18%
Region 1	3,565	15%	14%	23%	47%	41%	25%	33%
Region 2	2,963	13%	10%	9%	68%	47%	34%	19%
Region 3	9,460	18%	12%	18%	52%	56%	25%	19%
Region 4	10,465	11%	18%	25%	46%	62%	15%	23%
Region 5	16,307	13%	20%	30%	37%	46%	26%	28%
Region 6	27,932	17%	5%	24%	54%	68%	22%	10%
Region 7	9,079	14%	12%	33%	41%	55%	28%	18%
Region 8	10,663	12%	9%	23%	55%	35%	35%	31%
Region 9	6,543	6%	15%	19%	60%	46%	25%	29%
Region 10	12,412	17%	15%	21%	47%	46%	29%	25%
Region 11	12,842	19%	16%	22%	43%	58%	25%	17%
Region 12	34,401	15%	11%	18%	57%	74%	17%	8%
Region 13	10,181	17%	19%	26%	39%	59%	27%	15%
Region 14	5,357	13%	15%	24%	49%	53%	21%	26%

Source: DCDEE files and survey data



from a low of 35% in Region 8 to a high of 74% in Region 12. In a similar fashion, the percentage of children receiving care in not-for-profit centers varies from a low of 15% in Region 4 to a high of 35% in Region 8. Finally, although in some areas of the state more than 30% of children are enrolled in public programs (Regions 1 and 8), in Region 12, only 8% of children are enrolled in such public programs.

**Staffing.** The child care center staff that participated in the director survey represented a wide variety of positions in the early childhood field. Weighting those responses to represent the total director population yielded results that show titles such as: director (56%); director/owner (24%); principal (7%); and various other titles such as administrator, assistant director, coordinator, lead, manager, and supervisor.

Among staff who completed a teacher survey, about three quarters identified themselves as teachers or lead teachers. Slightly over a quarter were assistant teachers, teacher's aides, substitutes, or floaters. Grouping these differing titles resulted in about 74% being considered "teachers" and 26% being considered "assistant teachers." About half of those filling out the teacher survey indicated that they work with infants, toddlers, or twos at least some of the time. Half indicated that they work only with older preschool children. There was an overlap of respondents (approximately 13%) who indicated that they work with both populations. Respondents to the teacher survey included a small number of other staff (<1%) with a wide variety of self-reported job titles including bus driver, cook, coordinator, administrative support persons, etc. Although these individuals reported that they teach or work with classrooms of children, on the basis of available information, they could not be reliably classified as either a teacher or an assistant teacher. These individuals are included in aggregate results describing "teaching staff" but are omitted from those analyses where "teachers" and "assistant teachers" are reported separately.



**Wage Scales.** Center directors reported compensation scales for center teaching staff that included low starting wages and limits on the highest wages paid to teachers and assistants (**upper 4 rows of Table 3**). In 2015, starting teachers earned a median \$10.00 per hour. This amount represents a 4.8% increase from the starting wage expected

		2011 Wage in 2011 Dollars	2011 Wage in 2015 Dollars	2015 Starting Wage	Real Change (2011-2015)	Percent Change 2011-2015
All Centers Statewide	Starting Teacher Wage	\$9.00	\$9.54	\$10.00	105%	4.8%
	Highest Teacher Wage	\$11.25	\$11.92	\$12.50	105%	4.9%
	Starting Assistant Teacher Wage	\$8.00	\$8.48	\$9.00	106%	6.1%
	Highest Assistant Teacher Wage	\$9.50	\$10.06	\$10.00	99%	-0.6%
Centers with NC Pre-K classrooms	Starting Teacher Wage	\$13.46	\$14.26	\$15.00	105%	5.2%
	Highest Teacher Wage	\$21.00	\$22.25	\$21.31	96%	-4.2%
	Starting Assistant Teacher Wage	\$10.50	\$11.12	\$11.25	101%	1.2%
	Highest Assistant Teacher Wage	\$12.00	\$12.71	\$15.16	119%	19.3%
Centers without NC Pre-K classrooms	Starting Teacher Wage	\$8.50	\$9.01	\$9.00	100%	-0.1%
	Highest Teacher Wage	\$10.25	\$10.86	\$11.00	101%	1.3%
	Starting Assistant Teacher Wage	\$8.00	\$8.48	\$8.00	94%	-5.7%
	Highest Assistant Teacher Wage	\$8.75	\$9.27	\$9.50	102%	2.5%
Note: Median wages are reported. Data are based on directors' reports. Adjusted for CPI using wage calculator from BLS Website: <a href="http://www.bls.gov/data/inflation_calculator.htm">http://www.bls.gov/data/inflation_calculator.htm</a>						

<sup>2</sup> Adjusted for CPI using wage calculator from the BLS Website, [http://www.bls.gov/data/inflation\\_calculator.htm](http://www.bls.gov/data/inflation_calculator.htm)

by teachers in 2011 in terms of real buying power.<sup>2</sup> The situation for assistant teachers, with a median starting wage in 2015 of \$9.00 per hour, represents a 6.1% increase in buying power during this same time period. For the highest paid teachers, the outlook over the past five years was similar, with a 4.9% increase in real wages over the five-year period. Median highest paid teacher wages rose from \$11.92 per hour (adjusted) in 2011 to \$12.50 in 2015. Median highest assistant teacher wages declined slightly from a 2011 figure of \$10.06 per hour (adjusted) to \$10.00 in 2015. Though the typical highest wage of a teacher increased by a yearly average of more than \$.10 per hour in buying power, the



median wage of the highest paid assistant teacher actually declined by more than a penny per hour per year over this period.

Despite these overall trends, there are important wage scale and wage progression differences for teaching staff depending on whether or not they work in a program that has an NC Pre-K classroom on site. Licensed early care and education programs with NC Pre-K classrooms have substantially better compensation at all levels than do those without such classrooms as shown in the lower two panels of **Table 3**. For starting teachers and assistant teachers and for highest paid teachers and assistant teachers, working in settings with an NC Pre-K classroom results in higher compensation. Median starting teacher salary in programs with at least one NC Pre-K classroom is a full 2/3 more than median starting teacher wages in programs without NC Pre-K classrooms (\$15.00 vs. \$9.00). The median highest paid teachers working in settings with an NC Pre-K classroom make nearly twice as much as do the highest paid teachers in settings without an NC Pre-K classroom (median highest wage of \$21.31 vs. \$11.00 per hour). There is also a substantial wage premium for an assistant teacher who is just starting out: \$11.25 in those settings that have an NC Pre-K classroom vs. \$8.00 in other settings. This difference seems to grow with seniority as highest paid assistant teachers were reported to have a median wage of \$15.16 in settings with NC Pre-K classrooms compared with only \$9.50 per hour in other settings. Data suggest that employment at a site with an NC

Pre-K classroom results in a more rapid wage progression for all of the staff in such settings.

**Table 4** suggests that any “NC Pre-K wage effect” varies according to program organization, location, and sponsorship. Examining the first data column of this table reveals that publicly sponsored programs, especially public schools, are more likely to have an NC Pre-K program than non-publicly sponsored programs. In fact, 89% of the public school programs in our sample have an NC Pre-K classroom while well over half of Head Start programs (64%) also have NC Pre-K classrooms. On the other hand, the far more prevalent for-profit and not-for-profit centers are much less likely to have NC Pre-K classrooms. However, NC Pre-K classrooms are disproportionately likely to be found in more rural as opposed to more urban areas. About 36% of the centers located in isolated rural counties have NC Pre-K classrooms, while only 31% of centers located in the state’s most populous and prosperous metropolitan counties have such classrooms. (See Appendix D for county breakdown by urbanization.) In centers without NC Pre-K classrooms there is a \$.075 to \$1.25 per hour starting wage difference for both teachers and assistants between those located in the most urbanized metropolitan areas and those located in isolated rural counties. Among centers with NC Pre-K classrooms, median starting wages for teachers and assistants are higher than in those centers without NC Pre-K classrooms.

Further median starting and peak wages are consistently high and uniform across the three types of communities.

Further, there is a positive correlation between a program's star rating and the likelihood of having an NC Pre-K classroom; more than half of 5-star programs in the state have NC Pre-K classrooms, while virtually none of the 3-star or below programs have these classrooms. This is to be expected because the state's NC Pre-K standards are related to license type.

The impact of centers in the non-profit and public sectors is especially pronounced in rural communities where employment challenges are greatest. Such an effect suggests that sustained career opportunities may be developed in these settings with a more attractive wage structure and progression. Urban centers without NC Pre-K programs have a better teaching staff wage profile than do rural centers, while the reverse is true of rural centers where programs with NC Pre-K classrooms display a more favorable wage structure than their urban counterparts with NC Pre-K classrooms.

As seen in the bottom rows of **Table 4**, there is a positive relationship between better wages for teaching staff and program quality as indicated by star rating. While this relationship does not hold true for NC Pre-K programs between the under 3-star rating and 5-star rating, this disparity is due to those programs in public school settings that currently have a temporary license, thus falling into the under 3-star category. These programs in public school settings are required to pay their teachers and assistant teachers on the public school system salary scale regardless of star level.

<b>Table 4</b> <b>Wages of ECE Teaching Staff in NC by NC Pre-K Classroom Designation, 2015</b>										
		Percent With NC Pre-K Classrooms	Median Starting Teacher Wage		Median Highest Teacher Wage		Median Starting Asst Wage		Median Highest Asst Wage	
			No NC Pre-K	NC Pre-K	No NC Pre-K	NC Pre-K	No NC Pre-K	NC Pre-K	No NC Pre-K	NC Pre-K
Statewide (2015)	All Programs	31%	\$9.00	\$15.00	\$11.00	\$21.31	\$8.00	\$11.25	\$9.10	\$15.16
Type of Organization	For-Profit	17%	\$8.50	\$9.50	\$10.25	\$13.00	\$8.00	\$8.50	\$9.00	\$10.00
	Not-for-profit	28%	\$9.00	\$11.00	\$12.00	\$16.00	\$8.50	\$9.00	\$10.00	\$11.00
	Public	70%	\$11.50	\$17.91	\$15.38	\$34.01	\$9.80	\$11.25	\$12.29	\$17.95
Sponsoring Agency	Proprietary or Corporate	17%	\$8.75	\$9.50	\$10.30	\$13.00	\$8.00	\$8.50	\$9.00	\$10.00
	Community Board / Faith Community	20%	\$9.00	\$10.00	\$11.00	\$15.00	\$8.00	\$8.50	\$9.13	\$10.00
	Head Start Programs	64%	\$11.20	\$12.98	\$15.62	\$18.00	\$9.80	\$10.41	\$12.29	\$14.00
	Public Schools	89%	\$17.91	\$17.91	\$34.01	\$34.01	\$11.25	\$11.25	\$17.95	\$17.95
Location	Metropolitan	31%	\$9.00	\$13.00	\$11.00	\$19.56	\$8.25	\$10.50	\$9.75	\$14.00
	Micropolitan	31%	\$8.00	\$17.91	\$10.00	\$34.01	\$7.75	\$11.25	\$9.00	\$17.95
	Isolated Rural	36%	\$8.00	\$17.91	\$10.00	\$34.01	\$7.50	\$11.25	\$8.50	\$17.95
Star Rating	No stars to 3 stars*	8%	\$8.50	\$17.91	\$10.00	\$34.01	\$8.00	\$11.25	\$9.00	\$17.95
	Four Stars	21%	\$9.00	\$12.00	\$10.50	\$15.00	\$8.00	\$9.00	\$9.00	\$12.61
	Five Stars	56%	\$10.00	\$17.91	\$13.98	\$22.04	\$9.00	\$11.25	\$10.50	\$16.68
Source: 2015 Directors Survey *Based on 18 cases of programs with NC Pre-K classrooms that are in the process of attaining star-rated licenses										

Thus, there appears to be mutually reinforcing relationships between centers' star ratings, public sector or public school sponsorship, and the presence of an NC Pre-K designation. Further, all of these factors seem to influence the development of a more favorable wage structure for the teaching staff of these programs. By state mandate, NC Pre-K classrooms are required to maintain high quality as indicated by higher license levels. Along with this requirement, teachers who work in NC Pre-K classrooms must have at least a bachelor's degree and Birth-Kindergarten teaching license and, in public schools, must be compensated comparably to licensed K-12 teachers. Given these criteria, the fact that higher license levels overall report higher starting salaries comes as no surprise. Both teachers and assistant teachers who work in higher star-rated centers earn higher wages, and this pattern seems likely influenced somewhat by having an NC Pre-K classroom.

**Wage Scales by Regions.** Breaking the wage scales down by regions shows great variation in starting and highest paid teachers and assistant teachers geographically. See **Table 5**. Teachers working in Region 5 can expect the lowest starting median wages of \$8.13/hour and are not likely to exceed \$9.68/hour as their highest wage. On the other end of the spectrum, in Regions 2, 8, and 12, median starting compensation exceeds \$10.00/hour with wages peaking at \$18.84/hour in Region 10. Statewide, assistant teachers can expect to have an average maximum wage of about \$10.00 per hour, ranging from \$7.50 to \$12.29 depending on their location. Only programs in Regions 2, 8, and 10 compensate their highest paid assistant teachers with a median of \$12.00 per hour or more.<sup>3</sup>

**Wage Scales by Geographic Areas.** Similar to the CCR&R regions, differences in wage scales occur across the state. (See **Appendix D** for a list of counties and their corresponding geographic area.) Across the board, those teachers and assistant teachers who work in micropolitan (micro) counties fair significantly worse in terms of wage earnings than their counterparts in metropolitan (metro) or rural counties. Starting teachers in micro counties make just \$8.50 per hour compared to starting teachers in metro areas who make \$10.00 per hour. Wages for starting teachers in rural areas fall at \$9.19 per hour. Starting assistant teachers follow this same pattern with micro county starting teachers making the least (\$8.00 per hour) followed by rural starting assistant teachers (\$8.25 per hour) and finally metro county starting assistant teachers (\$9.00 per hour).

Highest paid teachers and assistant teachers reveal a slightly different pattern of wage progression by geographic area. While micropolitan counties maintain their place at the lowest end of paid wages, highest paid teachers and assistant teachers in rural areas can expect a higher median salary than their counterparts in more urban areas. Salaries for highest paid teachers for micro, metro, and rural counties are \$11.00, \$13.00, and \$16.00 per hour respectively. For highest paid assistant teachers, the median rates are \$9.50, \$10.10, and \$12.29 per hour. While the flip between metro and rural counties on its surface appears as an anomaly, a closer examination of the data reveals that 13% and 16% (teacher vs. assistant teachers) of programs reporting wage information in metro counties were in public schools. In rural areas, 29% and 30% (teachers and assistant teachers) of programs reporting this data were public school programs. Because public schools have mandated salary scales and ranges that often outpace salaries in the private sector, and because school programs in rural areas represent a higher reporting proportion of all early care and

**Table 5**

**Median Wage Scales in Centers by Region**

	Director Reported Starting Teacher Wage	Director Reported Highest Teacher Wage	Director Reported Starting Assistant Wage	Director Reported Highest Assistant Wage	Teaching Staff Reported Wage
Statewide	\$10.00	\$12.50	\$9.00	\$10.00	\$10.46
Region 1	\$9.00	\$11.98	\$8.50	\$10.00	\$10.10
Region 2	\$11.00	\$16.17	\$8.68	\$12.00	\$9.75
Region 3	\$8.64	\$11.32	\$8.25	\$9.00	\$9.45
Region 4	\$10.00	\$13.20	\$9.00	\$10.50	\$10.00
Region 5	\$8.13	\$9.68	\$7.50	\$9.00	\$9.23
Region 6	\$9.50	\$12.00	\$8.69	\$10.00	\$10.79
Region 7	\$9.00	\$12.00	\$9.00	\$10.00	\$9.45
Region 8	\$11.14	\$15.00	\$9.80	\$12.00	\$11.75
Region 9*	\$9.33	\$12.75	\$8.50	\$11.00	\$9.25
Region 10	\$10.00	\$18.84	\$8.50	\$12.29	\$10.10
Region 11	\$10.00	\$12.00	\$8.68	\$10.00	\$10.00
Region 12	\$10.50	\$13.50	\$9.50	\$11.00	\$12.00
Region 13	\$9.75	\$12.50	\$8.50	\$10.00	\$10.00
Region 14	\$8.25	\$10.00	\$8.00	\$10.00	\$8.75
*Region 9 data are unweighed due to low numbers of respondents					

<sup>3</sup> See Appendix B for detailed information about salary imputations in small regions; imputation techniques were used in cells with fewer than 20 cases or those where the item response rate was below 60%.



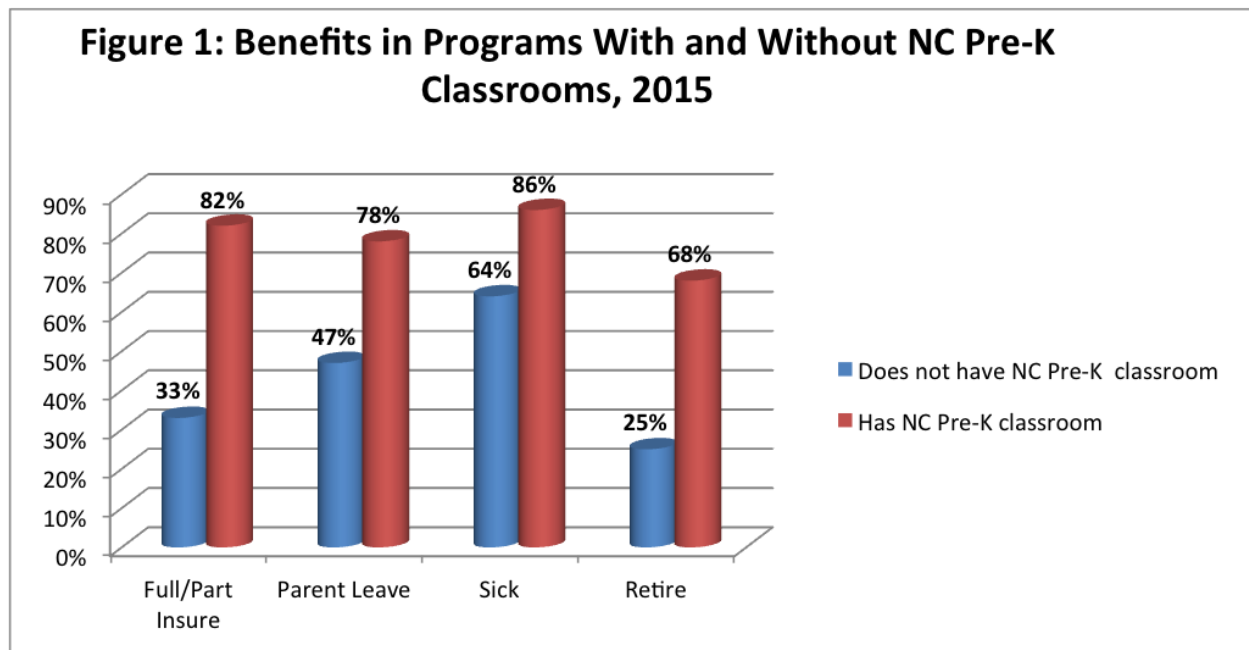
education programs, these findings are not surprising.

**Employment Benefits.** Employment benefits offered by centers in North Carolina are shown in **Table 6**. Less than half of programs provided some help with health insurance in 2015. This pattern is close to the 51% that offered this benefit in 2011. Although fully paid health insurance has never been characteristic of most child care programs, this benefit appears to have declined from 21% in 2011 to 19% of programs in 2015. Although relatively few programs offer free child care to employees, an apparent increase has occurred in the percentage of programs that offer this benefit (from 10% to 13%) though there has been a decrease in programs that offer some relief from the high cost of child care through reduced fees (from 55% to 52%). Those programs offering parental leave has held stable from 2011 to 2015 at 56%. Overall, paid time off has not shown much change since 2011, however, the type of leave has changed slightly. In 2011, vacation time was paid by 86% of programs, but in 2015, only 83% offered this benefit. Paid holidays, the most common type of benefit, has held steady at 90% of programs offering this benefit to their staff. Although paid sick time is offered in less than three-fourths of programs (72%), it is only slightly different from the 67% of programs offering this benefit four years ago. Because early care and education programs are incubators for germs, failure to provide

<b>Table 6</b> <b>Employment Benefits in ECE Centers</b>		
	2011	2015
Fully Paid Health Insurance	21%	19%
Partially Paid Health Insurance	30%	30%
Free Child Care	10%	13%
Reduced Child Care Fee	55%	52%
Parental Leave	56%	56%
Paid Sick Leave	67%	72%
Paid Vacation	86%	83%
Paid Holidays	90%	90%
Paid Retirement Benefits	40%	39%

this benefit to staff often results in teachers either having to work while sick, thus adding to the pool of germs found in programs, or having to take unpaid leave until they are well.

Over the years since NC Pre-K's inception (formerly More at Four), public pre-k programs have contributed to increases



in many types of benefits. Working in sites with an NC Pre-K classroom increases the opportunity to receive health insurance, parental leave, sick time, and retirement. See **Figure 1**. NC Pre-K programs are the drivers for increasing the overall benefits provided in 2015 from programs offering these benefits over a decade ago.

Whether or not a child care provider receives any support with health insurance (as well as other benefits and

<b>Table 7 Health Insurance and Wages by Auspice, 2015</b>			
Type of Center	Pct Employers Who Offer at Least Partly Paid Health Insurance	Median Starting Teacher Wage	Median Highest Teacher Wage
Private For-Profit (Single Center)	17%	\$8.50	\$10.00
Private Not-For-Profit (Sponsored by Faith Community)	29%	\$8.50	\$10.00
Private For-Profit (Multi-Center)	52%	\$9.50	\$12.50
Private Not-For-Profit (Comm./Board Sponsored)	55%	\$10.00	\$13.00
Public Program (Mental Health, Comm. College)	100%	\$12.74	\$14.00
Head Start	100%	\$12.97	\$17.61
Public School	100%	\$17.91	\$34.01

their wages) relates to the organizational auspice of the program in which the teacher works. See **Table 7**. All publicly sponsored programs offer their teachers either free or reduced health insurance, and in most of these programs, a teacher can expect a starting wage of at least \$12.74 per hour and most can expect to make at least close to \$14.00 per hour after some time. Those providers working in non-profits (excluding those sponsored by faith communities) fall below public employees with 55% receiving full or partially paid health insurance with a starting median wage of \$10.00 per hour and highest median wage of \$13.00 per hour. On the other end

of the scale, employees in single center, for-profit programs have a median starting wage of just \$8.50 per hour (typically having a top wage of \$10.00) and only 17% receive support with employer offered health insurance. These types of centers are the most prevalent form of organization in the state; almost 40% of all centers in the state are single site, private, for-profit centers (representing 33% of enrollment). On the other hand, about one in four programs statewide are publicly sponsored (with 20% of enrollment), and fewer still are public school sites (representing just 8% of enrollment).

These wage findings reflect similar national findings from the Government Accountability Office<sup>4</sup>, which found low wages among all child care providers but higher pay for individuals working in publicly funded programs such as Head Start.

**Overtime Pay.** Among the 47% of the teaching staff who reported that they had ever worked over 40 hours per week, about half (52%) said that their centers paid them time and a half for the overtime hours that they worked. When directors were asked this same question about their teaching staff, a lower 43% said that their teachers sometimes work over 40 hours per week. However, 67% of these directors explained that teachers who are asked to work over 40 hours per week are compensated at one and a half times their regular hourly wage. Another 9% of employers, mostly in public school settings, report that their teachers are on annual salaries and exempt from overtime requirements, while another 13%, again mostly in the public schools, reported time off in lieu of additional compensation. Federal wage and hour law requires that non-exempt workers such as early care and education teachers receive time and a half for overtime hours. This law does not apply to public sector employees who may receive time off in lieu of paid compensation. Regardless of setting, 19% of teachers reported that they have worked over 40 hours per week on occasion without receiving any type of compensation or time off.

## Profile of the Early Care & Education Workforce

The center-based early care and education workforce in North Carolina is overwhelmingly female and includes a large proportion of workers who have

<b>Table 8 Demographic Profile of ECE Workforce in North Carolina, 2015</b>				
	Director		Teaching Staff	
	2011	2015	2011	2015
Median Age	46 yrs	47 yrs	36 yrs	38 yrs
Female	97%	95%	99%	99%
People of Color*	43%	44%	43%	47%
Have Children	89%	88%	74%	74%
Single Parent w/Child 0-18	9%	9%	18%	14%
At least One Child 0-18	49%	48%	52%	48%
Annual Family Income <\$30K	15%	14%	59%	56%
*Includes, Asian, African American, bi-racial, and American Indian/Native American				

<sup>4</sup> US Government Accountability Office Report to the Chairman, Committee on Finance, US Senate, February 2012. "Early Childcare and Education. HHS and Education are Taking Steps to Improve Workforce Data and Enhance Worker Quality."

children of their own. **Table 8** displays data for directors and teaching staff, for two periods in time permitting an examination of continuities and changes in this workforce. Child care program directors look similar over this five-year period. There is a small decline in the number of female directors (97% vs. 95%). In North Carolina's centers, fewer than half of all teaching staff (47%) and directors (44%) are people of color. Of note, a similar percentage of directors and only a slightly lower percentage of teaching staff have family incomes less than \$30,000 per year. Given that four years have passed since the 2011 survey and that we continue to progress from the Great Recession which ended in 2009, the expectation would be a greater decline in this percentage. At \$30,000 a year, a teacher living in a family of three has earnings of less than 150% of the federal poverty level, low enough to qualify for a number of federal benefits.

Many teachers and assistant teachers have children young enough to need child care. Note that programs and services provided by early childhood employers as well other community agencies can be valuable resources for these workers and their families. Examination of the survey data suggests that of the estimated 30,350 early care and education teachers in North Carolina, about 7,000 are estimated to need child care for their own families. Most of these teacher-parents are served by the centers where they work (64%) or other child care centers or homes (36%). The centers employing them typically provide free or reduced care at the center for these employees' children (80%), but many remain eligible for government assistance for child care. The survey data suggest that about 2,500 early care and education staff statewide receive government assistance to help pay for their children's care at work or elsewhere. The dominant source of this payment is from vouchers (86%). The remaining help comes from diverse sources such as NC Pre-K funding, Head Start, and Early Head Start. In addition to the teachers currently served by these programs, others may be eligible and on one of the long waiting lists for subsidy in counties across the state.

## Education of the Early Care and Education Workforce

The education of the early care and education workforce has been a critical factor influencing children's early learning opportunities. With the recent release of the National Academics of Science report, "Transforming the Workforce for Children From Birth Through Age Eight," it is clearer than ever before that our young children need a well-educated workforce. The report recommends that all lead teachers working with children from birth through age eight have a bachelor's degree in early childhood education as a necessary but not sufficient measure for building quality teachers.<sup>5</sup> This section profiles the educational attainment and aspirations of the

workforce as expressed in the current survey. See **Table 9** for education data on center directors (directors, director/owners, and assistant directors), teachers (teachers and lead teachers), and assistant teachers (assistant teachers, teacher aides, and floaters). Data are presented from the most recent (2015) teacher and director surveys and the comparable

<b>Table 9</b> <b>Education of Center Directors, Teachers, Assistant Teachers, and Family Child Care Home Providers, 2015</b>						
Highest Education Completed	Directors		Teachers		Assistant Teachers	
	2011	2015	2011	2015	2011	2015
Bachelor's Degree or More in ECE/CD	19%	23%	13%	15%	5%	3%
Bachelor's Degree or More in Other Field	32%	37%	14%	22%	11%	12%
Associate Degree in ECE/CD	20%	18%	20%	21%	16%	24%
Associate Degree in Other Field	4%	3%	4%	5%	7%	7%
High School + Any College Courses	25%	19%	47%	36%	50%	44%
High School + Workshops	<1%	1%	1%	1%	4%	4%
High School Only	<1%	<1%	1%	1%	5%	5%
Less than High School	0%	0%	<1%	<1%	<1%	<1%
<b>Other Education Credentials</b>						
N.C. EC Credential	69%	66%	77%	73%	66%	68%
N.C. EC Administration Credential	73%	72%	22%	27%	14%	14%
Child Development Associate (CDA)	9%	6%	9%	10%	9%	11%
B-K/Preschool add-on License	10%	10%	10%	12%	1%	1%
<b>Educational Pursuits</b>						
Currently Taking ECE/CD Courses	20%	14%	28%	17%	30%	19%
Sources: 2011 and 2015 Director and Teacher Surveys						

<sup>5</sup> <http://www.nap.edu/catalog/19401/transforming-the-workforce-for-children-birth-through-age-8-a>

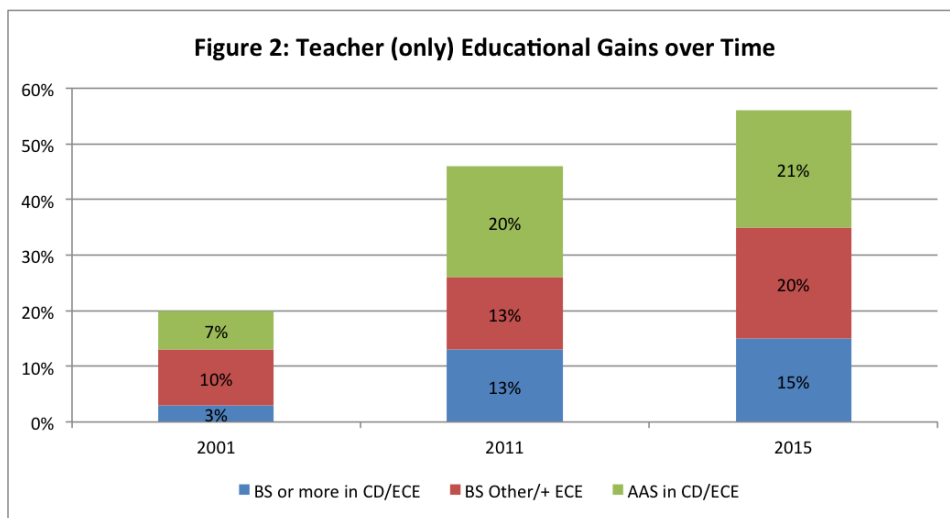
surveys conducted in 2011. Gains in degree-earning providers are a positive sign that the workforce is advancing its education to meet the needs of young children.

Not surprisingly, center directors have achieved higher levels of education than teachers or assistant teachers, though none of the groups match the minimum education requirements for teachers and administrators in public elementary, middle, and high schools. Standards in North Carolina's rated license system, Head Start and NC Pre-K all require and/or emphasize the addition of early childhood course work. Currently 47% of directors, 38% of teachers, and 28% of assistant teachers have a degree in early childhood education (i.e., AA, BA, or higher). While many others (34% of directors, 25% of teachers, and 18% of assistants) have a degree in a field other than early childhood or child development, the majority of these directors (87%) and teachers/assistant teachers (89%) with a college degree in fields other than early childhood education or child development, have taken at least one course in the field; the majority of these have taken more than one such course.



North Carolina's early care and education workforce has a strong interest in achieving higher levels of education. As shown in the lower half of **Table 9**, many directors, teachers, and assistant teachers have completed college courses. Furthermore, 17% of the teachers and 19% of assistants said that they were currently taking courses leading to a degree or credential in the early childhood field. Of those taking classes, 40% of teachers and 48% of assistant teachers were working towards an associate degree and 20% of teachers and 27% of assistant teachers were working towards a bachelor's degree. In 2015, 81% of directors, 63% of teachers, and 46% of assistants indicated that they had attained an associate, bachelor's, or master's degree in some field. In comparison, 75% of directors, 51% of teachers, and 39% of assistants in 2011 had earned an associate, bachelor's, or master's degree in some field. Additionally, 10% of directors, 12% of teachers, and 1% of assistant teachers have a B-K/Preschool add-on Teacher License compared to 10% of directors, 10% of teachers, and 1% of assistant teachers in 2011.

Investments in the early care and education system have paid off dramatically over time for the workforce in terms of increased education levels of teachers specifically around early care and education coursework. **Figure 2** suggests a ten percentage point change between 2011 and 2015 in the educational profile of teachers (only), most notably in the Bachelor's and above level. This follows a more dramatic increase both in overall educational attainment and in specific



types of degrees since the early part of the last decade. In 2001, a mere 20% of teachers had attained as much as an associate degree in early childhood/child development or had at least a bachelor's degree in another field and had taken an ECE course. By 2015, this percentage had more than doubled to 56%. Growth since 2011 is seen as well. Similarly, there has been a dramatic increase in



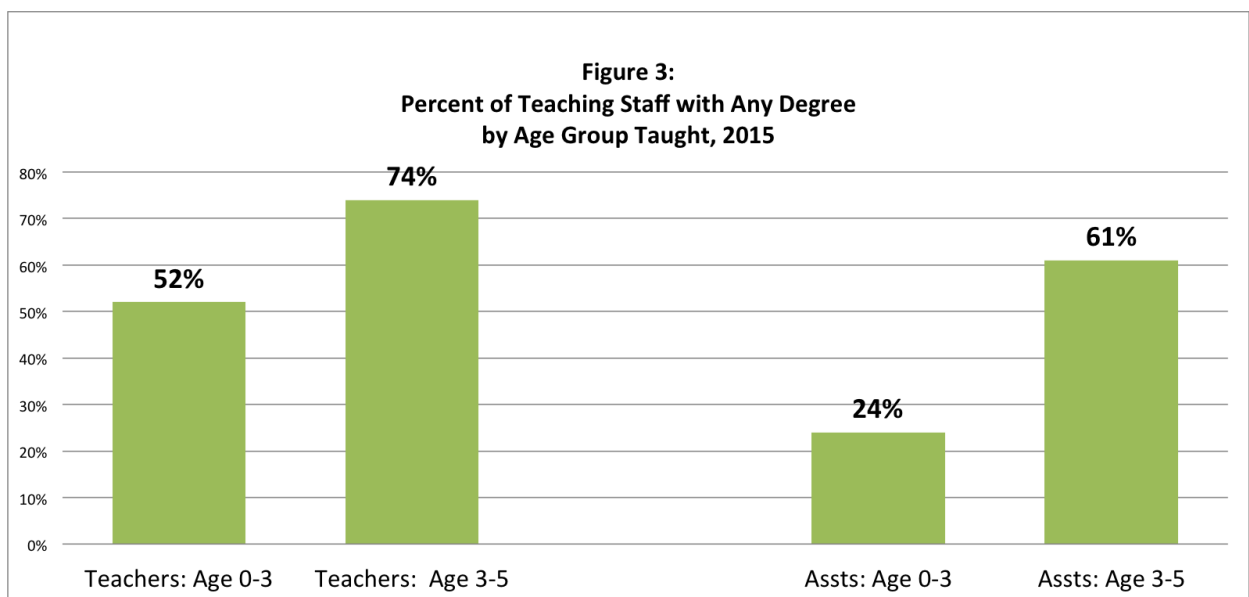
bachelor's degree holders who have taken courses in early childhood. In 2001 only 10% of teachers had degrees specifically in the field, but currently (2015) 38% of teachers and over one quarter of assistant teachers (28%) have obtained degrees specifically in the profession.

Increasing more dramatically, are teachers (only) who have at least a bachelor's degree in a field other than early childhood/child development and who have also taken at least one early childhood education course. The percent falling into this category increased from 10% in 2001 to 20% in 2015, since almost 90% of teachers whose degrees are in non-ECE fields

have taken some courses in ECE or Child Development. Although only 15% of all assistant teachers have bachelor's or advanced degrees of any kind, 85% of those with such a level of education either have a degree in an ECE field or have taken some courses in the field. The overall effect of this pattern of selective education has resulted in a workforce that is better educated not only generally, but specifically in the field of early childhood education.



**Education of Teachers and Assistant Teachers by Age Group Taught.** Education levels of teachers differ as a group depending on the age of children in their care. Infant and/or toddler teachers (ages of children from birth to 36 months) tend to have lower levels of education than those who teach children three years old or older. See **Figure 3**. Some teachers indicated that they taught multiple age groups spanning across infant/toddlers and preschoolers (three to five year olds). In these cases, education levels were counted in both age groups. Seventy-four percent (74%) of those teachers who taught preschoolers (three through five year olds) had at least an associate degree compared to only 52% of those teachers who taught infants and/or toddlers. Similarly among teacher assistants working with preschoolers, 61% had a degree at the AA level or above, whereas only 24% of their peers who



worked with infants and/or toddlers had this level of education.

## Education by Regions.

Across the state, education levels of directors, teachers, and assistant teachers vary by region. See **Table 10**. The percentage of directors statewide with a bachelor's degree or more education in any field is 59%. Almost half of the directors in the state (47%) have a college degree in the ECE field. Further, nearly a third of the teaching staff (teachers and assistants) of centers (31%) has a degree beyond the associate level, and more than one third of this teaching workforce (35%) has a college degree (AA or higher) in early childhood education. This includes associate, bachelor's, master's, and PhD degrees in early childhood education or child development. However, two in five of this teaching workforce (42%) has not achieved the associate degree level of education.

**Table 10**  
**Education Levels by Region, 2015**

	Directors				Teachers/Teacher Assistants			
	Greater than AA degree	AA degree	Less than AA degree	*ECE Degree	Greater than AA degree	AA degree	Less than AA degree	*ECE Degree
Statewide	59%	21%	19%	47%	31%	27%	42%	35%
Region 1	62%	19%	20%	43%	36%	28%	36%	52%
Region 2	75%	8%	17%	44%	31%	31%	39%	39%
Region 3	60%	20%	20%	47%	33%	24%	43%	31%
Region 4	60%	21%	20%	53%	28%	25%	47%	37%
Region 5	44%	24%	32%	35%	19%	34%	47%	33%
Region 6	55%	23%	22%	51%	33%	26%	41%	34%
Region 7	51%	33%	16%	39%	24%	25%	51%	28%
Region 8	64%	25%	11%	64%	30%	30%	40%	38%
Region 9	62%	10%	27%	26%	22%	39%	40%	47%
Region 10	62%	25%	13%	56%	30%	35%	34%	48%
Region 11	60%	18%	22%	46%	33%	24%	43%	38%
Region 12	67%	21%	12%	51%	41%	21%	38%	29%
Region 13	65%	17%	18%	50%	21%	27%	51%	37%
Region 14	60%	18%	22%	36%	24%	32%	45%	39%

Source: Director and Teacher Surveys  
\*ECE degree includes associate, bachelor's, master's and PhD degrees in early childhood education or child development

Region 5 exhibits the lowest overall level of education for directors with almost one third (32%) of the directors having no college degree. In a similar fashion, teaching staff in this region have a comparatively low level of education; 47% do not have a college degree. On the other hand, Region 2 has the highest percentage of directors with at least a bachelor's degree but four regions (7, 8, 10, and 12) have a higher percentage of directors with any degree. Specifically in the field, Region 8 leads the way with 64% of directors with an ECE degree. Region 9 has the lowest percentage at 26%.

Levels of education can be compared for teaching staff as well. Region 10 stands out with 65% of their teachers and assistants who have some type of college degree. In Region 12, 41% of the teaching staff have a bachelor's degree or higher. However, Regions 7 and 13 have the highest percentage of teaching staff with no degree at 51%. When looking specifically at ECE degrees, Region 1 has the highest percent of teachers with a degree in this field of study at 52%. However, Region 7 has only 28% of their teaching staff with a degree in the field.



**Table 11**  
**Teacher (only) Education Levels by Region, 2015**

	Teachers			
	Greater than AA degree	AA degree	Less than AA degree	*ECE Degree
Statewide	36%	26%	38%	38%
Region 1	44%	26%	30%	58%
Region 2	43%	24%	34%	39%
Region 3	39%	25%	36%	33%
Region 4	37%	20%	43%	40%
Region 5	24%	30%	46%	31%
Region 6	35%	28%	37%	40%
Region 7	31%	21%	48%	26%
Region 8	40%	29%	31%	42%
Region 9	29%	36%	36%	50%
Region 10	41%	31%	28%	54%
Region 11	40%	25%	36%	47%
Region 12	46%	20%	34%	32%
Region 13	22%	26%	53%	39%
Region 14	24%	31%	45%	40%

Source: Teacher Surveys 2015

\*ECE degree includes associate, bachelor's, master's and PhD degrees in early childhood education or child development

With continued discussion revolving around lead teacher education levels, closer examination of this population reveals some encouraging information for North Carolina. See **Table 11**. In 2011, 27% of teachers (only) had at least a bachelor's degree. In 2015, this percentage had risen to 36%. Nearly every region has seen growth in the percentage of teachers (only) with at least a bachelor's degree. In 2015, Region 13 had the lowest percentage of teachers with at least a bachelor's degree with 22%. However, Region 12 shows the largest percentage of teachers with this level of education at 46%.

Regional variation in educational levels of the workforce is likely affected by the wide geographic variation in the availability of educational resources and supports across the state. For many North Carolinians in rural communities, access barriers hinder the ability to obtain continuing education. At times, accessibility can be limited by distance, i.e. the excessive commute to an on-campus class. Other times, accessing higher education in rural areas can be limited by insufficient technological support or resources such as limited internet availability or only dial up access.

**Education by Geographic Areas.** Not surprisingly, directors in metropolitan areas of North Carolina have the highest levels of education with 82% holding an associate degree or higher. Seventy-five percent (75%) of directors in micropolitan counties have at least an associate degree and falling between these two groups, 80% of directors in rural areas have obtained an associate degree or higher.

Assistant teachers in micro counties show both the highest percentage with a degree of any kind (62%) and the highest percentage of degrees directly in the field (51%). Rural areas fall next in line with 47% of assistant teachers with any degree and 37% with at least an associate degree in the field. Finally, 43% of assistant teachers in metropolitan areas have at least an associate degree with less than one in four (23%) having a degree in early childhood.

As an employment group, teachers prove the most interesting in terms of education levels by geographic area. Fifty-eight percent (58%) of teachers in micropolitan counties have at least an associate degree in any field, followed by 63% of teachers in metropolitan areas and an interesting 67% of teachers in rural counties. Further, in non-rural counties, 40% (micropolitan) and 37% (metropolitan counties) of teachers hold a degree directly in the field. However, 47% of teachers in rural areas have studied and obtained a degree in early childhood education. Clearly a larger percentage of teachers in rural areas understand the reality of the early childhood field as a viable profession.





## Earnings of the Early Care and Education Workforce

Workforce earnings in North Carolina remain low. See **Table 12**. The median self-reported wage of \$10.46 per hour for all child care teachers and assistants in North Carolina does not compare favorably to the starting wage of public school teachers in the state (\$17.91 per hour not including local supplements). Child care center directors' self-reported median hourly wage of \$16.00 barely competes with that of the starting public school teachers despite the added responsibility of running a business. With such low earnings, it is no wonder that early care and education teachers (11% of teachers and 14% of assistant teachers) said that they worked another paid job in addition to their job as a teacher or assistant. See **Table 14**. The median number of hours worked per week in these additional jobs was 10 for teachers and 11 for assistants.

**Table 12**

**Self-Reported Earnings of the Early Care and Education Workforce, 2011-2015**

	2011 Wage in 2015 Dollars	2015 Wage	Real Change (2011-2015)	Percent Change 2011-2015
90th Percentile Wage: Teacher & Asst Teacher	\$15.28	\$15.50	101.4%	1.4%
50th Percentile Wage: Teacher & Asst Teacher	\$10.39	\$10.46	100.7%	0.7%
10th Percentile Wage: Teacher & Asst Teacher	\$7.95	\$8.00	100.6%	0.6%
90th Percentile Wage: Director	\$27.02	\$28.85	106.8%	6.8%
50th Percentile Wage: Director	\$15.89	\$16.00	100.7%	0.7%
10th Percentile Wage: Director	\$10.59	\$9.75	92.1%	-7.9%

Source: Director and Teacher Surveys

**Wage Trends.** Wages for the early childhood workforce have just barely been keeping pace with the cost of living despite increases in education and experience. See **Table 12**. In 2011, teachers and assistants had a median wage of \$10.39 in 2015 dollars. By 2015, the median wage for these early childhood professionals was just over that amount at \$10.46. This represents a fairly stagnant wage growth of 0.7%. A similar scenario plays out at the lowest 10th percentile with real wages only growing 0.6%. Those at the top of the pay scale saw a bit more increase at 1.4%.

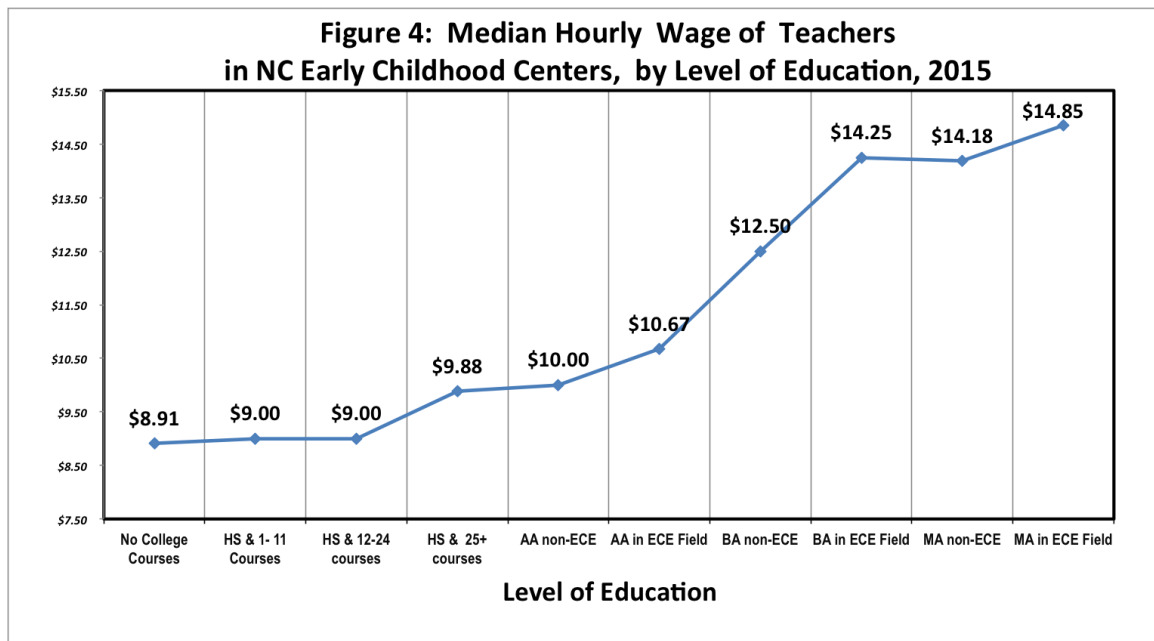
Center directors at the upper and lower ends of the scale experienced a different wage trajectory over the last few years. Those directors at the top, in the 90th percentile, saw a gain of 6.8% to a real wage \$28.85 per hour. Those on the lower end, however, saw a decline of 7.9% to just \$9.75 per hour, below that of the median teachers and assistant teachers. The mid-range directors' wages looked similar to teachers with a 0.7% increase to \$16.00 per hour. The past few years might be best characterized as one of wage stagnation for most of the early childhood workforce, with some slight improvements and declines for those with the lowest wages and income.

As would be expected, educational level plays a role in teacher and assistant teacher wages. **Figure 4** shows, when all fields of degrees are combined, the more education teachers receive, the higher their paycheck. Having an associate degree raises the median paycheck by \$1.09 to \$1.76/hour over not having any college coursework. Jumping from an associate to a bachelor's degree or higher yields a median paycheck that is about \$2.50/hour to \$3.50/hour higher than the average paycheck for the lower degree in the same category. For those who received an associate degree in a field other than early childhood but then studied to get a BA in the field, the gain was even higher. This same pattern holds true for assistant teachers as well.





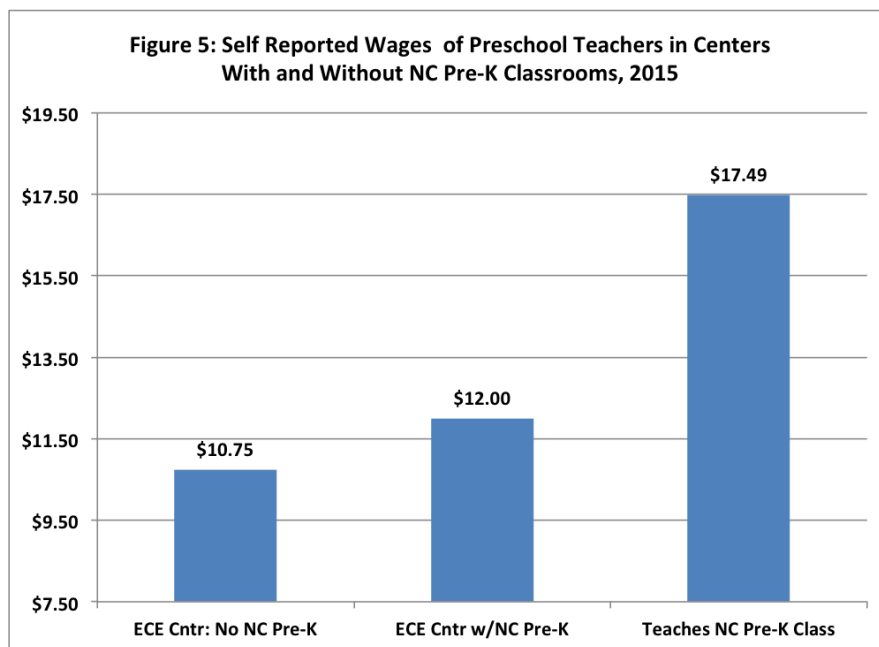
No evidence exists that taking formal post-secondary coursework provides an immediate financial reward until a teacher has taken 25 or more classes (**Figure 4**). Teachers with a high school diploma/GED and up to 24 college courses only average \$9.00 per hour. However, a noticeable gain in salary is made once teachers complete 25 courses, where the median average salary is \$9.88 per hour. Of note for teachers, a degree specifically in early childhood/child development provides sizeable financial gain at the associate, bachelor's, and master's degree levels. For an associate degree level teacher, one who has an early childhood degree makes, on average, \$0.67 more per hour (\$1,394 per year for a full time/full year teacher) than a teacher with a degree in a field other than early childhood/child development. The highest yield is for a bachelor's degree: the ECE degree premium appears to be about \$1.75/hour (\$3,640 per year for full time/full year). For a master's level teacher, those with an early childhood degree make \$0.67 more per hour than their



counterparts with a master's degree in any other field (\$1,394 per year for full time/full year).

Previous NC workforce studies have suggested that for the typical teacher, pursuing degrees beyond a bachelor's level in early childhood may not significantly advance wages. In the 2012 survey, teachers with a bachelor's degree in early childhood/child development earned a median salary of \$13.84/hour as opposed to teachers with a master's degree in early childhood/child development who averaged \$13.52/hour. Wage estimates for individuals with master's degrees in prior studies were inconclusive about the value of ECE/CD master's degrees in part because they were based on relatively few cases overall and an especially small number of post-baccalaureate degrees in the early childhood/child development field. However, relatively more individuals in the 2013 workforce sample reported both hourly wages and having a master's degree level of education. Further, in the 2014 study, there was even a larger number of individuals reported having ECE/CD master's degrees (N=50) as well as master's degrees in other fields (N=49). These replicate our findings from the 2012 and 2013 studies. In 2015, however, we see a decline in wages for a master's level degree in a field other than early childhood (verses a bachelor's in early childhood) but a gain in a master's degree in the field. The magnitude of this year's effects are larger than in previous years, suggesting a real wage premium for those with bachelor's degrees with an early childhood emphasis versus those with a different kind of bachelor's degree, and an even stronger wage premium for those with an early childhood master's versus those with a different type of master's degree.

For assistant teachers, a broad similar trend holds true linking increased education and improved wages, though not as dramatically or consistently as with teachers. The small numbers of assistant teachers, especially at the higher levels of educational attainment, make it difficult to draw firm conclusions about links between education and wages. Further it may be likely that as teacher assistants acquire more academic credentials they may be promoted to become teachers.



More definitive examination of career progression and wage progression questions will probably require longitudinal analyses tracking individuals over time.

The presence of NC Pre-K is a significant factor in teacher pay. As **Figure 5** demonstrates, for teachers, being in a center with an NC Pre-K classroom and/or teaching in an NC Pre-K classroom increases the opportunity for a larger paycheck. State policy recommends comparable compensation to public schools for those directly in NC Pre-K classrooms, so a higher salary specifically for NC Pre-K classroom teachers is expected. However, there is no such recommendation stated for those in non-NC

Pre-K classrooms operated by centers that also have NC Pre-K classrooms. Yet data indicate that there has been a positive impact or “spillover effect” for these teachers as well. Preschool teachers who work in early care and education programs that have an NC Pre-K classroom, but who themselves do not work in that classroom make \$1.25 more per hour than teachers in programs without such a classroom. For those teachers working in NC Pre-K classrooms as well, their salary is typically over \$5.49 per hour more than their peers who work in centers with an NC Pre-K classroom but who themselves do not actually work in those classrooms. These differences in salary vary depending on the auspice of the child care program in which the teacher is employed, however, regardless of whether the teacher is in a for-profit, non-profit, or publicly sponsored program, having an NC Pre-K classroom raises the earnings of teachers even if they are not in that classroom.

### Earnings of Teachers and Assistant Teachers by Age Group Taught.

For teachers and lead teachers, those who teach infants and/or toddlers had a median salary of \$10.00 per hour. Those teachers who taught preschool children fared better with a median salary of \$12.00 per hour. The same holds true for assistant teachers of infants and/or toddlers who make only \$9.00 per hour compared to their preschool counterparts making \$10.25 per hour. (Many teachers and assistant teachers indicated that they taught multiple age groups spanning across infant and/or toddlers and preschoolers. In these cases, earnings were counted in both age groups.)

**Earnings by Region.** As with most professions, earnings vary based on geographic location. **Table 13** breaks down the median earnings of directors, teachers, and teacher assistants by region. Region 9 has the lowest paid directors at a median salary of \$13.00. Highest paid directors can be found in Region 8 at a median wage of \$19.00 per hour.

**Table 13  
Director, Teacher, and Teacher Assistant Earnings  
by Region, 2015**

	Director	Teacher	Teacher Assistant
Statewide	\$16.00	\$10.97	\$9.97
Region 1	\$15.75	\$10.10	\$10.10
Region 2	\$18.24	\$10.32	\$8.97
Region 3	\$14.50	\$10.00	\$9.00
Region 4	\$16.00	\$10.50	\$9.50
Region 5	\$14.00	\$9.00	\$9.50
Region 6	\$16.83	\$11.00	\$10.00
Region 7	\$15.00	\$9.50	\$9.00
Region 8	\$19.00	\$13.12	\$10.25
Region 9	\$13.00	\$9.25	\$9.50
Region 10	\$14.42	\$10.50	\$9.68
Region 11	\$18.00	\$10.50	\$9.25
Region 12	\$18.00	\$12.50	\$10.00
Region 13	\$15.00	\$10.00	\$10.00
Region 14	\$15.00	\$9.42	\$8.00



Lowest paid teachers can be found in Region 5 at a median wage of \$9.00 per hour. Employers in Region 14 pay the lowest median wage to assistant teachers at \$8.00 per hour. Along with being the highest paying region for directors, Region 8 teachers make the highest median amount of \$13.12 per hour. The highest assistant teachers' median wage stays in this same region and is \$10.25 per hour. Overall, the highest paying regions for teachers, with salaries of at least \$11.00 per hour are Regions 6, 8, and 12. For assistant teachers, those paying a median of at least \$10.00 per hour are Regions 1, 6, 8, 12, and 13. In Region 1, the median salary of teachers and assistant teachers appears to be the same at \$10.10 per hour. This situation can be explained by the fact that disproportionate numbers of assistants reporting in this region may be employed in those centers in the public sector, which typically have higher wage scales. It should be pointed out that larger centers and publicly sponsored centers (both of which tend to pay higher wages) also employ larger numbers of assistants as a percentage of their total staff.

**Earnings by Geographic Areas.** As would be expected, the median salary for directors in metro counties far outpaces salaries for the other two geographic areas of the state at \$16.83 per hour. Salaries in micro county fall next in line at \$14.41 per hour with director salaries in rural areas lagging behind at \$14.00 per hour.

For assistant teachers, this same pattern holds true. Self-reported wages for assistant teachers show a low in rural communities of \$8.25. Micro counties give assistant teachers more than rural areas with a median salary of \$9.42 per hour. Finally, assistant teachers in metropolitan areas of North Carolina see the highest average salary at \$10.00 per hour.

Teacher self-reported wages diverge from the pattern above. Lowest paid teachers can be found in micropolitan areas with a median salary of \$10.00 per hour. Next, metro counties are home to teachers who make \$11.00 per hour on average. Finally, highest paid teachers are found in rural areas at \$11.18 per hour. This higher salary in rural areas, though unexpected, could be caused by a variety of factors including both place of employment (i.e. public vs. private) and tenure in their program and the field.

### **Economic Well Being of the Early Care and Education Workforce.**

Many people working in the early childhood field face severe economic challenges that affect their families and them personally. Overall, the early care and education workforce is at a significant disadvantage economically. Strictly in terms of household income alone, early care and education providers and their families fall well short of other North Carolinians as a whole. From the U.S. Census Bureau's Quick Facts, the median North Carolina household income in 2014 was \$46,784. More than 7 in 10 early care and education teachers and assistant teachers, have household incomes below this amount. One in ten early care and education teachers and assistant teachers (10%) has had to adjust to the loss of family income due to their job loss at some time in the last three years. However, fewer than half (45%) who lost their jobs received unemployment compensation.



But household earnings are not the only indicator of overall economic well being. Additionally, 39% of teachers and 39% of assistant teachers had received some type of public assistance (e.g., Medicaid, SNAP, TANF, child care subsidy) in the previous three years. These indicators are slightly better for teachers and assistant teachers than the findings

of the 2011 survey when 40% of teachers and assistants had received some type of public assistance during a comparable time interval.

<b>Table 14 Individual Economic Well Being of Child Care Providers, 2015</b>		
	Teachers	Assistant Teachers
Median Hourly Earnings	\$10.97	\$9.97
Median Household Income	\$25-29K	\$20-24K
Single Parent with Child 0-18	14%	16%
Used Public Assistance in Past 3 Years	39%	39%
Works Another Job	11%	14%
No Health Insurance, 2013	34%	34%
No Health Insurance, 2014	22%	24%
No Health Insurance, 2015	19%	17%
Source: Teacher Surveys		

**Table 14** breaks down the hard financial burden that teachers and assistant teachers must battle each day. Given the bleak economic climate for teachers and assistant teachers in North Carolina, center directors often find it difficult to attract and retain qualified staff. As expected, assistant teachers face more severe economic challenges than do teachers. Hourly wages for assistant teachers remain below that of teachers as do their overall household earnings. To increase their financial situations, a higher percentage of assistant teachers than teachers work a second job.

One bright spot in the situation of the child care workforce is the dramatic improvement in health insurance coverage that seems to have taken place over the last several years.

The proportion of the ECE workforce without health insurance has been persistently high, and ECE employers seem to have reduced their extensiveness of work-based coverage offered over the last several years. In 2013, over one third of teaching staff at centers (34%) had no health insurance from any source. In 2014, the proportion of uninsured dropped across the board to about 22%. This year shows another drop to 19% of teachers and 17% of assistant teachers being uninsured. This is likely due to uptake of insurance through the availability of more options through the Affordable Care Act, and extensive community outreach as well as targeted marketing to the ECE workforce conducted by numerous community agencies in North Carolina including Child Care Services Association. In fact, nearly 1 in 4 teachers and assistants (24%) indicated that they receive insurance either as a result of the Affordable Care Act or that they are on their parents' insurance (which was expanded through the Affordable Care Act).

## Professional Support for the Early Care and Education Workforce

Early childhood research has shown that higher education and compensation of early care and education providers can lead to positive outcomes for children. Programs such as the T.E.A.C.H. Early Childhood® Project and salary supplements have addressed some of the educational and financial needs of early care and education providers while lowering staff turnover. At the program level, child care centers offer staff opportunities to develop their teaching skills and professionalism through coursework and by creating a supportive work environment. The workforce survey included a number of questions on these professional support topics.

**The T.E.A.C.H. Early Childhood® Project.** According to center directors, 56% of centers in North Carolina had at least one staff member that had ever received a T.E.A.C.H. scholarship. This is slightly more than the 55% reported in 2011. Among respondents to this year's teacher surveys, a sizeable proportion of teachers and assistant teachers (22%) said that they had received a T.E.A.C.H. scholarship. In 2011, 25% of teachers and assistant teachers had received such a scholarship. Among respondents, 98% of center directors and 95% of teachers and assistants had heard of the T.E.A.C.H. Early Childhood® Project. When the teaching staff is broken down, 24% percent of teachers and 18% or assistant teachers report receiving T.E.A.C.H. Early Childhood® support.

Data from the T.E.A.C.H. Early Childhood® Project indicate that the Project is working to increase the education levels of child care providers.<sup>6</sup> Evaluation data show that 54% of T.E.A.C.H. Early Childhood® participants were not working on a degree before they learned about the Project. Of those, 77% indicated they could not afford the cost of higher

<sup>6</sup> T.E.A.C.H. Early Childhood® data received from participant evaluation received in 2015.





education. For Project participants, more than three-fourths indicated that they are more satisfied with their jobs (77%). Nearly as many, 72%, said that participation in the T.E.A.C.H. Early Childhood® Project has made them more willing to stay with their current early care and education program.

In any given year, nearly 50% of T.E.A.C.H. scholarship recipients are people of color. The widespread availability of T.E.A.C.H. scholarships has helped raise the qualifications of the workforce and has potentially contributed to the increasing percentage of people of color in center leadership positions.

**Salary Supplements.** Among North Carolina teachers and assistant teachers, 39% reported that they had received a salary supplement funded by Smart Start at some point in their careers. This included 42% of teachers and 30% of assistant teachers. According to recent Child Care WAGE\$® information<sup>7</sup>, the mean six month supplement for all participants in 2015 was \$951. Ninety-seven percent (97%) of participants in the

program indicate that WAGE\$ has encouraged them to stay in their current program. Further, 96% say that the program helps them feel more satisfied with their job and 99% say that WAGE\$ supplements help ease financial stress.

Child Care WAGE\$® not only provides benefits for participants. Directors also realize the benefits with 76% indicating that the program increases morale and 63% specifying that lower turnover is a benefit. Finally, 68% of directors cite Child Care WAGE\$® encouraged staff to seek more education. Salary supplement amounts were not included in the calculation of individual respondent hourly wages.

**Other Center-Provided Support.** Child care centers can support the professional development of staff without creating a significant financial burden on their programs. Seven key types of professional support that centers can provide staff are an orientation to the child care program, written job descriptions, written personnel policies, paid education and training expenses, paid breaks, compensatory time for training, and paid preparation or planning time. See **Table 15**. Since 2011, those programs providing these low cost benefits have remained fairly consistent with one notable exception. In 2011, 55% of programs offered paid time off for training. In 2015, this percentage had increased to 60%. Programs offering written job descriptions increased slightly from 91% to 93%. Similarly, 76% of programs offered paid education/training in 2011, but this had increased by two percentage points to 78% in 2015.

Though there has been only a slight increase in the particular supports offered, the overall number of supports that programs give their staff has increased since 2011. Among the responding centers, 74% offered at least five of these seven types of support (up from 70% in 2011) and only 14% offered three or fewer (compared to 16% in 2011). Offering a more professional work environment may be a low-cost

**Table 15**  
**Professional Support Benefits in Child Care Centers**

Type of Professional Supports	2011	2015
Orientation	90%	89%
Written Job Description	91%	93%
Written Personnel Policies	91%	91%
Paid Education/Training	76%	78%
Paid Breaks	56%	56%
Time Off for Training	55%	60%
Planning/Preparation Time	67%	67%
<b>Numbers of Professional Supports Provided</b>	<b>2011</b>	<b>2015</b>
0-3	16%	14%
4	14%	12%
5+	70%	74%

Source: Directors Surveys 2011 and 2015

<sup>7</sup> Child Care WAGE\$® data received from financial payment made to participant in 2015.

means for centers to reduce staff turnover.

## Experience and Turnover of the Child Care Workforce

Young children need experienced, well-educated teachers with whom they can form close attachments over time. These attributes are even more important for teachers of infants and toddlers. North Carolina has a combination of seasoned child care professionals who have remained with their current programs for years as well as some less-experienced providers who have either just begun in the field or in a new child care program. Across the state, median length of experience in the child care field was 18.0 years for directors, 11.5 years for teachers, and 8.0 years for assistant teachers. Further, about 19% of teachers and 29% of assistant teachers reported having worked at their center for less than a year. For teachers, this rate is identical to 2011 and nearly the same for assistant teachers (31% in 2011). See **Table 16**.

<b>Table 16 ECE Workforce Experience</b>		
<b>Center Based Staff</b>	<b>2011</b>	<b>2015</b>
Teachers Years in Current Center	3.6	3.6
Teachers with less than 1 Year in Current Center	19%	19%
Teachers Years in Child Care Field	10.0	11.5
Assistant Teachers Years in Current Center	2.0	2.5
Assistant Teachers with less than 1 Year in Current Center	31%	29%
Assistant Teachers Years in Child Care Field	6.0	8.0
Directors Years in Current Position in Center	6.0	6.4
Directors Years in Current Center	na	10.1
Directors Years in Child Care Field	17.0	18.0
Source: Directors and Teacher Surveys in 2011 and 2015		

Overall, for directors and teachers, the typical years of experience in the child care field increased a bit between 2011 and 2015, with the changes suggesting somewhat greater stability in the workforce. Teachers' median years of experience in the field increased from 10.0 years in 2011 to 11.5 years in 2015. Teacher assistants reported a median of 8.0 years working in the field in 2015, somewhat longer than the median of 6.0 years reported in 2011. A one year increase occurred for directors from 2011 to 2015 as the median years of experience in the field increased from 17.0 years to 18.0 years.

Likewise, directors, teachers and teacher assistants are staying in their programs for slightly longer than they were in 2011. Directors' median years in their positions in their centers increased by five months from 6.0 years to 6.4 years. Teacher assistants remained in their centers for six months longer than in 2011, from 2.0 years to 2.5 years. Teachers showed the smallest increase in time in their centers from 3.5 to 3.6 years.

<b>Table 17 ECE Workforce Turnover</b>		
<b>Statewide Separation Rates</b>	<b>2011</b>	<b>2015</b>
Full-time Teachers and Assistant Teachers	18%	18%
Full-time Teachers	19%	19%
Full-time Assistant Teachers	16%	13%
Teachers Leaving the Field in 3 years	21%	19%
Assistant Teachers Leaving the Field in 3 years	24%	21%
Infant Toddler Teachers Leaving the Field in 3 years	23%	21%
Preschool Teachers Leaving the Field in 3 years	18%	17%
Directors Leaving the Field in 3 Years	11%	12%
Source: Directors and Teacher Surveys in 2011 and 2015		

The current survey included data which can be used in two different measures of turnover: (1) for center-based teachers, the percentage of child care teachers and assistant teachers who left their centers during the previous year and (2) for individual directors, teachers, and assistant teachers, the percentage of workers who are planning to leave the child care field in the next three years. An aggregate separation rate can be constructed by summing the number of staff reported by center directors as working in their centers and dividing into the number

they reported as having left employment in the previous year. See **Table 17**. As a proportion of the population of full-time teachers and assistants in the state, 18% left their centers during the previous 12 months which has held steady from the 18% rate in 2011. The separation rate for teachers was 19% and for assistants it was 13% in 2015. Compared to 2011, the teacher rate has remained the same, however, the teacher assistant turnover rate has dropped three percentage points since 2011.

These same data can be used to calculate center specific separation rates. These rates varied substantially across centers and ranged from 0% to 400% of full-time staff. Seventeen percent (17%) of centers reported that they had no full-time staff turnover during the previous year while 2% of centers had turnover at or above 100% of current full-time staff.

Nearly one in five teachers (19%) said that they plan to leave the field in the next three years. For assistant teachers, the rate was 21%. Both of these rates were slightly lower than their 2011 values. Directors, however, were somewhat less likely to say that they plan on leaving the field in the next three years at 12% up slightly from the 11% rate in 2011.

**Experience and Turnover by Age Group Taught.** Not surprisingly, when controlling for age group taught, preschool teachers and assistant teachers show slightly more experience both in their centers and in the field as a whole compared with infant and/or toddler teachers.

When asked if they would be leaving the field within three years, 17% of preschool teaching staff answered in the affirmative. For infant and/or toddler teaching staff, more than one in five (21%) responded that they may not be in the field in three years. During this early period of development (8 months to 2 years), many young children go through a period of stranger anxiety, which can only be exacerbated by staff churning.

Teachers of preschool children typically had been employed by their programs for 4.0 years, and had been in the field for 12.2 years. For assistant teachers working with preschoolers, median years working in their current center with preschoolers was 3.0 although they reported having been in the child care field for a median of 10.0 years. The profile for teaching staff working with infants and/or toddlers suggested less employment stability. Almost one-fourth of the teachers of this youngest age group (22%) have been in their programs a year or less with a median of 3.3 years in their current program, although typically they report having been in the field for 10.8 years. A similar profile is found for assistant teachers in this age group. Thirty percent (30%) have worked in their center for a year or less with a median of 1.7 years in their current program, although they have had a median 6.0 years in the field as a whole. (It should be noted that although some teachers and assistant teachers indicated that they taught multiple age groups spanning across infant and/or toddlers and preschoolers, most of those who taught one group regularly did not teach the other group. In the cases where there was overlap in ages taught, experience and turnover were counted in both age groups.)

**Experience in ECE Field by Region.** The amount of experience both within their current center and within the field as a whole varies across regions in our state. **Table 18** displays the median number of years that teachers, assistant teachers, and directors, have worked in the program where they are currently employed. The table also displays the typical length in years that these early childhood professionals have spent working in the field. Teachers' typical length of time working in their current center ranges from 2.8 years in Regions 12 to 5.9 years in Region 14 with a statewide

	Region 1	Region 2	Region 3	Region 4	Region 5	Region 6	Region 7	Region 8	Region 9	Region 10	Region 11	Region 12	Region 13	Region 14	Statewide NC
Teachers- Center	4.3	3.0	3.3	4.0	3.2	3.6	4.3	5.0	5.1	4.0	5.0	2.8	3.6	5.9	3.6
Teachers- Field	11.0	8.7	7.0	10.4	10.0	12.0	10.8	14.3	13.5	11.0	12.5	11.3	12.5	16.0	11.5
Assistants- Center	2.0	5.3	1.4	1.5	5.2	2.0	2.1	4.2	3.6	3.0	3.0	1.5	1.0	3.6	2.5
Assistants- Field	12.0	14.8	5.8	6.5	13.0	6.0	9.8	8.0	10.4	10.2	8.0	6.1	8.0	11.3	8.0
Directors- Center	8.0	3.0	5.0	7.3	8.2	6.4	11.0	5.0	2.5	5.8	5.0	6.0	5.0	16.0	6.4
Directors- Field	19.5	20.0	15.2	18.0	16.5	15.3	20.4	23.5	16.2	21.0	18.0	16.4	16.7	25.0	18.0

Source: Director and Teacher Surveys



compare with a statewide median career length of 8.0 years for assistant teachers. These findings are consistent with other evidence presented earlier that the career pattern of assistant teachers may be lengthening.

Finally, and not surprisingly, directors typically have the lengthiest tenure in their centers. Directors have a statewide average tenure of 6.4 years in their current position in their current center, but this varies across the state. The median years range from 2.5 years in Region 9 to 16.0 years in Region 14. Directors, as would be expected, tend to have relatively lengthy careers in the ECE field, just as they did in their own centers. Typically a child care center director in North Carolina has been in the field for 18.0 years. Directors in Region 3 have had the shortest careers (15.2 years), while those in Region 14 have been in the field for the longest period of time (25.0 years). In five different regions of the state, center directors have been in the ECE field typically for two decades or more.

**Experience in ECE Field by Geographic Areas.** Across the state, directors have been in their present jobs and in the field for varying amounts of time. Directors in rural areas have the most instability with just 4.7 years in their present position in their centers and 16.1 years in the field. In metropolitan areas, directors stay longer in their positions and in the field at 6.0 years and 17.0 years respectively. The most stability in director positions can be found in micropolitan areas. In these areas of the state, directors have been in the positions in their programs for a median length of 8.3 years. Their commitment to the field is evident in the average 20.0 years that they have been working.

The story for teachers differs somewhat from directors. For teachers, rural areas have the most stability with teachers remaining in their programs for 5.0 years and in the field for 15.0. These amounts compare to 3.5 in their programs and 10.3 years in the field in micro counties and 3.6 years in their programs and 11.5 years in the field for more urban, metropolitan counties. As noted above, self-reported salaries and median highest paid teacher salaries in rural areas are higher than in other parts of the state perhaps contributing to longevity for teachers.

Assistant teachers look more similar to directors. In rural areas, assistant teachers remain in their programs for just 2.5 years and in the field for 7.3 years. Though in metro areas the length of stay in their program is slightly less than rural areas for assistant teachers at 2.2 years, they remain in the field longer, for 8.0 years. Similar to director, the greatest area of stability for assistant teachers is in micropolitan areas where assistant teachers stay in their programs for 4.0 years and in the field for 9.0 years.

**Workforce Retention.** Survey respondents who indicated that they planned to leave the field within three years were then asked what would make them stay in the field. Directors and teachers provided some similar and some different motivators stemming from the unique roles and responsibilities of each group. Higher earnings were listed by the largest group of directors (50%) as a

median of 3.6 years. In terms of teachers overall experience in the field, Region 3 has a low of 7.0 years for teachers and Region 14 has a high of 16.0 years (compared with the 11.5 years statewide average).

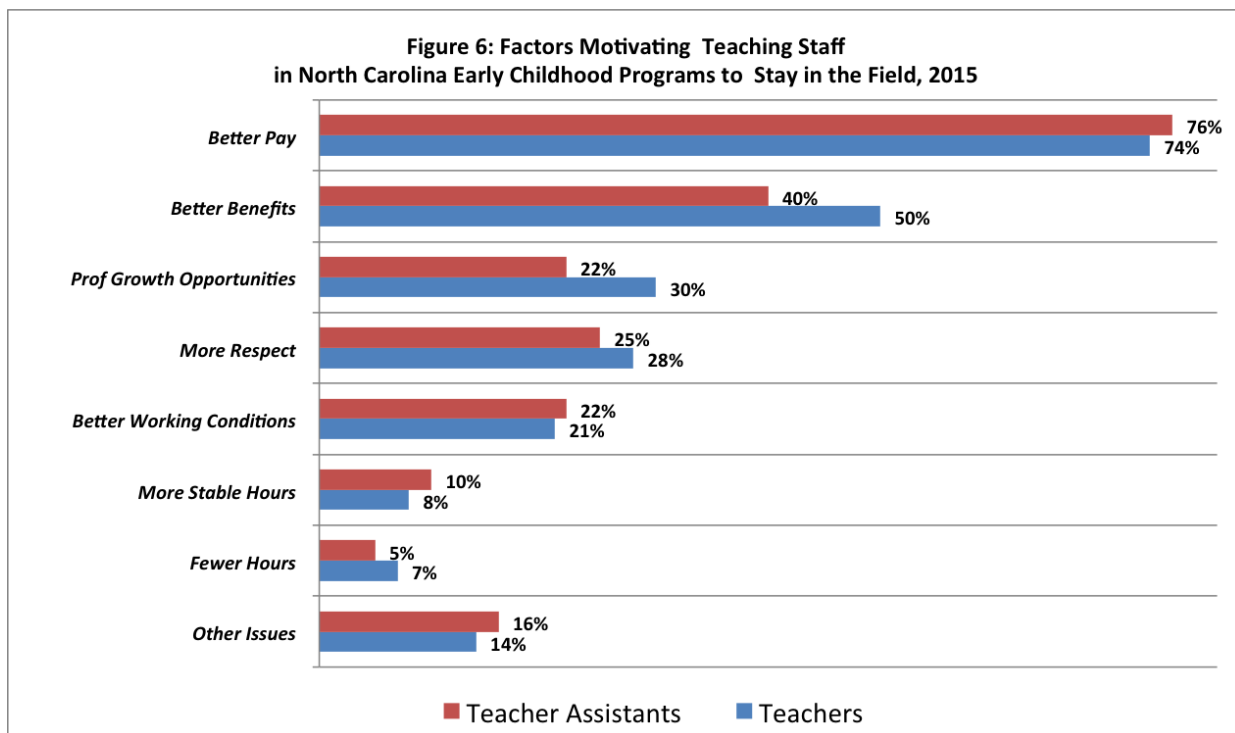
For assistant teachers, the statewide average of 2.5 years in their center compares to a low in Region 13 of about a year to a high in Region 2 of 5.3 years. Experience in the field as a whole is typically more brief for assistant teachers than for teachers, ranging from a low of 5.8 years (Region 3) to 14.8 years (Region 2). These years

<b>Table 19</b> <b>Factors Motivating ECE Directors to Stay in the Field, 2015</b>	
Center Directors	
Motivator	Percent Naming this Motivator
More pay	50%
More benefits	33%
Finding qualified teachers	31%
Fewer money problems for center	28%
Better working conditions	20%
Finding substitutes	19%
Professional growth opportunities	19%
More administrative help	18%
Working fewer hours	13%
Source: Director Surveys	



motivator to stay in the field. See **Table 19**. Likewise, more benefits was also a concern of many directors (33%), while finding qualified teachers was also listed by 31% of directors as a way to keep them in the field. The remaining items suggest that one in five of those directors intending to leave the field within the next three years might be deterred from doing so if they had better working conditions and nearly that same percentage (19%) said that if there were better professional growth opportunities and an easier mechanism for finding substitute teachers they might stay in the field.

Some motivators noted by directors were also identified as important factors for the teaching staff planning to leave the field in the next three years. Initiatives that might help them stay in the field include higher pay, which was listed as the top motivator with 74% of teachers and 76% of assistant teachers naming this factor. See **Figure 6**. Better benefits were listed by 50% of teachers and 40% of assistant teachers as important for their remaining in the early care and education field. Professional growth opportunities (30%) and more respect (28%) were also named by teachers as



important motivators. Teacher assistants mirrored teachers in identifying these two factors as well although with not quite the same frequency. Finally, having better working conditions was also identified by just over one in five teaching staff considering leaving as something that might make them stay.

## Conclusion



Remarkable progress has been made in the education of the early care and education workforce in North Carolina in the last four years. In the most recent period covered in this report, 2011-2015, the profession continues to show slow, but steady progress in a number of areas. When the Race to the Top Early Learning Challenge Grant application was submitted in the fall of 2011, one of the lofty NC goals set forth in the application was that “47% of lead teachers/teachers working with children from birth to five in licensed child care, Head Start, or Pre-K settings will have an Associate’s degree in Early Childhood Education or its equivalent or a Bachelor’s degree in Child Development alone or with a BK license or its equivalent” (p. 69). The percent of teachers with two or four year degrees in early childhood education or its equivalent increased by 10 percentage points in this four year period, exceeding the target set in the application (Figure 2). Similar educational progress can be found in the education of center directors, with 81% now having either a two or four year degree. These gains come at a time when the National Academies of Science have set forth recommendations that the bachelor’s degree is the foundation needed for lead teachers and for those leading early care and education programs.

Another important improvement is the decline in the rate of early childhood teachers without health insurance from any source. In 2011, about one-third of teachers were uninsured; in 2015 that dropped to about one-fifth of the workforce. The percentages of centers providing full or partial coverage did not change significantly during this period. But with the implementation of the Affordable Care Act, many teachers were able to access coverage. Similarly the percent of centers offering at least some paid sick leave has improved by five percentage points, from 67% to 72%. Both of these improvements support the health and wellness of the workforce, in an industry where there is high exposure to both infectious diseases and workplace injuries. Finally, early care and education employers continue to do a good job of at least partially subsidizing the cost of child care for their employees. Providing even a 50% child care cost reduction can often mean a monthly savings of \$300-\$500, depending on the age of the child.

On the compensation side, progress has been slow in the wages paid to the workforce over this period, in general. In 2011 teachers earned \$10.57 an hour in 2015 wages. In 2015 they earned \$10.97 an hour, an increase of 3.8%. Similarly, assistant teachers saw a real wage gain of 4.7%. Directors, on the other hand, only saw their real wages increase by 0.7%. Further, over the five year period there has been no real reduction in the high percent of the teaching workforce

(39%) that consistently relies on one or more forms of public assistance to make ends meet. This stagnation is happening even while the workforce education levels continue to rise. But the real story is the wide variation in education and wages across regions, types of employers, star ratings and presence of an NC Pre-K classroom in a center. Disparity exists for the workforce, but it plays out for our young children. For example, there is a 42% difference between the median wages of teaching staff in the lowest-paid and highest-paid regions. There is a 50% difference in the median highest teacher wage paid in public programs without NC Pre-K from the median highest teacher wage paid in a for-profit program. Similarly, in settings without NC Pre-K there is a 40% difference in the highest median teacher wage paid in a 5-star program compared to the median highest teacher wage in a program than has 3-stars or less. In programs that have an NC-PreK classroom, there is a 162% difference in the highest median teacher wage paid in public schools compared to those paid in a proprietary/corporate program; the wage differential between public schools and not-for-profit programs is 127%. So low and stagnant wages plays out in teacher



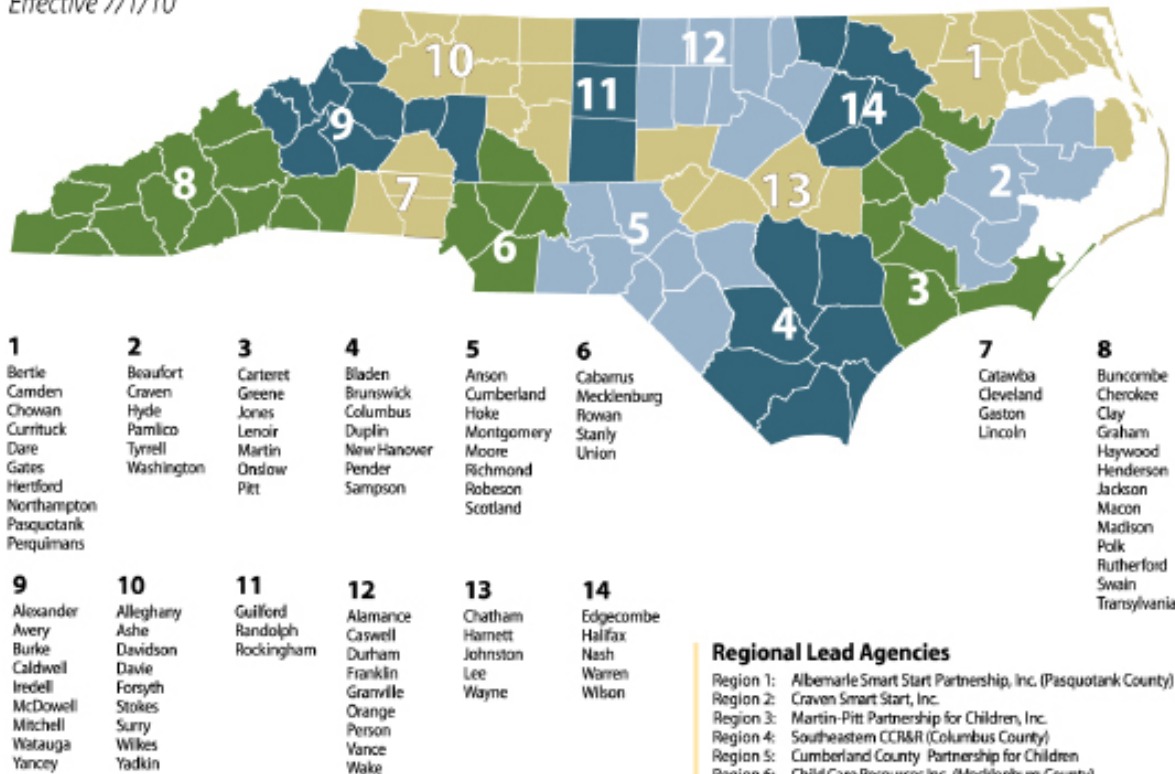
turnover with one out of five teachers leaving their centers each year. The overwhelming strategy teachers report would keep them in their classroom is better wages. It is this turnover that has a negative impact on young children, their attachments with adults in their lives and their own well-being in their child care arrangement.

But teachers are figuring this out. They have begun to realize that different programs pay very different wages. So while the turnover rate in programs has had little variability over this period, the longevity of teachers and directors in the early childhood profession continues to lengthen. This longevity in the field coupled with increased educational credentials are indicators of the development of a real professional workforce. Investments in the workforce through T.E.A.C.H. scholarships and wage supplements are really paying off in this process. Slight subsidy rate increases may have helped a little in the past year. Centers are also experiencing better enrollments as the economy has picked up. But with the wages not really reflecting the education gains, it would appear now is the time to tackle the challenge of workforce compensation. Without some new and strategic investments, North Carolina may experience a resurgence of higher turnover rates and the loss of its better educated teachers in its licensed and higher star settings. Better paying jobs in other industries may be a significant enticement without the compensation and recognition the workforce deserves.

## Appendix A

### North Carolina Regional CCR&R System - 14 Region System

Effective 7/1/10



#### Regional Lead Agencies

- Region 1: Albemarle Smart Start Partnership, Inc. (Pasquotank County)
- Region 2: Craven Smart Start, Inc.
- Region 3: Martin-Pitt Partnership for Children, Inc.
- Region 4: Southeastern CCR&R (Columbus County)
- Region 5: Cumberland County Partnership for Children
- Region 6: Child Care Resources Inc. (Mecklenburg County)
- Region 7: Child Care Connections of Cleveland County
- Region 8: Southwestern Child Development Commission, (Jackson County)
- Region 9: Iredell County Partnership for Young Children
- Region 10: Work Family Resource Center, Inc. (Forsyth County)
- Region 11: Guilford Child Development (Guilford County)
- Region 12: Child Care Services Association (Orange County)
- Region 13: Child Care Networks, Inc. (Chatham County)
- Region 14: Down East Partnership for Children (Edgecombe County)



## Appendix B

### Survey Methods and Response Rates for 2015 Survey

**Survey instruments.** The written and online versions of the questionnaires used in this survey were based on the forms for child care center directors, and teachers previously created and used by the authors of this study. The questionnaires were modified to include currently relevant and time-sensitive items. There were two separate instruments: (1) a director's survey which was intended for directors of early care and education programs; (2) a teaching staff survey which was provided to teachers and teachers' assistants in those programs whose directors participated in the study.

**Sampling Strategy.** Licensed child care centers selected for survey participation were drawn from January 2015 regulatory data of the North Carolina Division of Child Development and Early Education. At that time, several types of programs were excluded from the sampling frame that was constructed for the study. Those programs that served *only school-age children* or that provided care *only during the summer months* were excluded. It should be noted that those public pre-k programs which are not licensed (and hence are not included in the licensure files) are excluded from this study. Unlike the 2014 study, licensed family child care homes were not included.

The total population of child care centers was sorted by location in each of the 14 multi-county Child Care Resource and Referral (CCR&R) Regions. Each region was further divided according to its star rating (five categories) and size of program as measured by numbers of children aged 5 and under enrolled in the program (five categories). Each program within each cell was then assigned a random number and sorted by that number. Within each region the first 25% of each region's centers were randomly selected to mirror the star ratings and size categories of the overall population of child care programs in each region. For three of the smaller regions which in the past had not yielded sufficiently large numbers of cases to generate reliable statistical estimates, additional cases were sampled and targeted for inclusion. This process yielded a target sample of 1075 centers selected to be surveyed. The goal was to obtain data from 70% of the centers.

A feature of the workforce study which had been introduced in 2013, continued in 2014, and maintained in the current (2015) survey involved assuring the capacity to conduct longitudinal studies through the establishment of a special panel of centers. This panel consists of a subset of centers from which data has been obtained over several years. In order to construct this panel, all centers which had responded to CCSA workforce surveys in both 2011 and in 2012 were identified along with an additional random sample of centers represented in the 2012 survey only were included in the group of centers invited to participate in the 2013. These cases were then substituted for the first randomly drawn cases in each of the 14 regions. Similarly an additional panel for the 2014 survey was constructed from all centers responding to both the 2012 and 2013 surveys. Finally an additional panel component was introduced in the 2015 survey which consisted of those cases that had been included in the 2013 and 2014 surveys. No separate analyses are reported here using the 2014 or 2014 longitudinal panels separately, although panel status was taken into account in establishing sample weights described below. These panel data are available for use in special longitudinal analyses in the future as need arises and opportunities to use them become available.

**Survey Implementation Processes.** To begin the study, all centers with a valid email address on file with the Division of Child Development and Early Education were sent an online survey uniquely linked to their email address. Several reminder emails were sent and phone calls were made to remind center directors to check their emails and respond to the surveys. For programs with no email addresses and for those programs who failed to respond after numerous attempts through email, phone calls were made in an attempt to conduct the surveys over the phone.

Following numerous phone attempts, non-responding programs were sent a survey in the mail. Center packets included a cover letter, questionnaire and postage-paid return envelope for the director; cover letter, questionnaire and postage-paid return envelope for each teacher/assistant teacher to be surveyed, and raffle tickets and small thank you gifts for the director and teachers.

For programs in which the director had completed the survey either online or by phone, packets were sent that included a cover letter for the director and a small thank you gift. Also included were enough surveys for each teacher and assistant teacher, postage-paid return envelopes, raffle tickets and small gifts.

To ensure a high survey response rate, repeated email reminders, phone calls and mailings were made to child care centers to remind and assist participants in responding. When requested, mailings were faxed to programs. Staff also asked each participating program to confirm the number of full-and part-time teachers and assistant teachers who were

included in ratios for children birth to five. This number was used to help estimate the teachers' participation rate. Each panel case was replaced with the next highest randomly numbered case in the same region with a similar star rating and size category. At the end of the survey process it was found that none of the 1,075 cases originally selected had to be replaced with newly targeted ones. Panel cases have been documented on the subsequent files.

Following numerous phone attempts, non-responding programs were sent a survey in the mail. Surveys of samples of early childhood program directors, teachers working in those programs were conducted over the period from February 2015 through September 2015.

**Survey Response Results: Directors.** Useable surveys were obtained from 761 directors, which constitutes 72% of the stratified random sample (N = 1075). This number constitutes about 19% of the total population of all directors in the state (N = 4095). The director survey data were examined for differential response of directors of centers by region, by type of center, by size and by star rating, and panel vs. non-panel sample segment. Weights were constructed and applied which took into account the differential response from different subgroups of centers and which allow generalization of the sample data up to the level of the 4,095 centers in the population and on the sampling frame.

**Survey Response Results: Teaching Staff.** The second stage of the survey process involved surveying teaching staff and built upon the first phase. All directors in the selected centers identified in the first phase were contacted and asked to distribute surveys to their teaching staff, and useable surveys were returned by 3,078 teaching staff out of an estimated 5,957 believed to be working in centers whose directors returned surveys (52%). This estimate of a denominator of eligible respondents was based on directors' most accurate and recent reports of their own eligible teaching staff (i.e., teacher/assistant teacher). This number was either what directors reported on their own surveys or based on reports collected through a supplementary phone call made by CCSA staff to confirm the appropriate number of teaching staff eligible to receive the survey. This number could—and frequently did—differ from the number of personnel recorded on the license file. An additional 300 surveys were returned from teachers/assistant teachers whose directors did not return surveys. When possible, the data from these surveys are used, however, when analysis includes information cross referenced with director data, these surveys were not able to be used.

Because of fluctuations in employment, variations in who is or is not defined as a full or part time employee, and other reporting anomalies, the eligible statewide population of teaching staff is not currently known with complete precision. Estimates of that teaching staff population in centers were calculated by three different methods using both director survey data and data from the sampling frame, to arrive at a teaching staff population size. This year, the three estimates differed slightly and we chose to use the middle estimate; our best estimate of the population of center teaching staff in February 2015 is about 30,355.

Centers also varied in the extent to which their teaching staff responded to the survey. Within center response rates were estimated by using as a denominator the number of surveys that were distributed to center directors. This number was based on the number of teaching staff that center directors reported to survey staff would qualify for the survey as reported above. Teaching staff survey participation rates at the 761 centers varied from a low of no teaching staff responses (0%) to a maximum of all teaching staff responding (100%) with an average rate of 53%, with a median rate of 57%, a noticeable improvement over previous surveys. When the 761 centers whose directors had responded to their survey were arrayed by the level of teaching staff response, it was found that 22 percent yielded responses from all (100%) staff working at the center, 22% yielded responses from most of the working at the center staff (i.e. 66 to 99 percent), 16% yielded responses from about half of their staff (i.e., 45 to 64 percent). Another 17 percent of centers had responses from a minority of their staff (i.e., 1 to 44 percent). Finally 22 percent of the centers yielded no responses (0%) from teaching staff. When teaching staff participation rates were calculated separately by region, by center size, and by star ratings, no center-level averages of teacher survey participation rates in the various cells fell below 44% and most were well above 50%.

Because of this situation, information from the directors' surveys was used to assess how center and director characteristics might have affected response levels from the teaching staff. Among the relevant factors investigated, location, size, sponsorship, star-rating, and designation as a NC Pre-Kindergarten site affected teacher survey response. A number of teaching staff surveys (N=300) were returned from a small number of centers (N=77) whose director did not respond. This year, these responses were used in the overall pool of responses used to generate estimates of the teacher workforce. As a result, second stage weights were applied and adjusted for the differential teacher response associated

with these center characteristics. This multi-level weighting process gives us further confidence that the results from 3,378 teaching staff surveys completed and returned in 2015 can be statistically generalized to the statewide population of early childhood teaching staff that is estimated to consist of about 30,355 individuals.

**Survey Weighting Strategies.** Program and teacher level data have been weighted to reflect the statewide populations of centers and teaching staff respectively, adjusting for known individual, program and community characteristics associated with response bias. Percentages and other values reported in tables and graphs incorporate these sampling weights, permitting extrapolation to the actual population of centers (N=4095) and to an estimated teaching staff population (N=30,355).

In general, sampling weights reflected the inverse of the probability of selection and response for each of the strata used in the sampling design described above. First stage corrections were made for size, star rating and type of organization factors for centers, and panel segment status. When this process was completed, the sample was rescaled to reflect the geographic distribution of cases in the 14 Child Care Resource and Referral regions. A similar process was employed for the second stage of the sample consisting of teaching staff who worked in centers. These included teaching staff who responded to the teaching staff survey, but who worked in centers whose directors did not answer the director surveys. These survey units were again adjusted to reflect an estimate of within center response level, and geographic rescaling was performed to conform with (but not exactly match) the percentage distribution of the aggregate numbers of teaching staff as provided on the sampling frame across the 14 Child Care Resource and Referral regions. In order to minimize the likelihood of having unstable estimates due to very large weights being applied to a very small number of cases, final weights for teaching staff were adjusted by top-coding extremely high values to the value of 300% of the interquartile range by applying the Tukey fence technique. Weights were then rescaled so that the total would generate an estimated population of 30,355 cases. This meant that a few cases in which the value of the weight was between 20 and 100 were given a value of 19.5. This process affected fewer than 3% of the cases.

As part of the data analysis process, cases in each of the datasets were weighted so as to create more unbiased population estimates. Weighting schemes incorporated variables that affected probabilities of selection of a case as well as the other variables used in sample stratification which were empirically tested and found to display a distribution that approximated the actual probability of survey response for either a director or a teaching staff member. Samples were then tested to assure that the totals in the up-weighted datasets summed to approximate the estimated statewide totals of variables which could be known on the population of cases while at the same time reasonably reflecting regional percentage estimates.



The results of the application of these weights for each type of sample suggest that the weighting strategy employed proved to be quite effective in representing the population and major sub-populations of analytic significance. It should be noted, however, that the weighting process used in the report quite effectively adjusts for biases in estimates of measures of central tendency, e.g., means and medians that might be due to differential response. This process does not address the issue of precision of those estimates, and such measures of dispersion as variance, standard error, standard deviation. This situation is not problematic for this summary report, because no confidence intervals were reported, nor were formal tests of statistical significance reported or conducted. However, with further analysis such estimates could be calculated from the datasets by using more intensive statistical procedures. Further details are available upon request.

**Starting/Highest Paid Teacher and Director Salary Calculations.** Regional estimates of wage progression of teachers and assistant teachers were easier to construct than in past years. Despite the fact that initial and peak wages were often missing in the directors' surveys, the larger volume of survey returns allowed more stable estimates without having to rely on extensive imputation as had been done in previous years.

In more than 30% of the cases, the value of hourly wage of the director was missing in the original directors' survey and could not be estimated from other data. This is not surprising as many of these directors are small business operators and have difficulty expressing their income in hourly wage or annual salary terms. This level of missing data was lower than in past years, so imputation was not used to fill in missing cases. However, readers should bear in mind that some

estimates, especially those in smaller regions may be unstable given the low number of cases upon which estimates are based.

In various places within the report, organizational categories were collapsed for simplification. A three-fold categorization of organizational structure was employed in many analyses of the survey data: for-profit centers, non-profit centers and public sponsored programs. NC Pre-K programs (formerly More at Four) are represented among all three organizational structures. However, it is important to recall that public pre-k programs that are not licensed were not included as part of this study.

Appendix B contains information about the urbanization categories used in this report. Appendix C contains more information on definitions used in the report.

**Weighted estimates of the number of teaching staff in NC Centers.** Given the uncertainty about statewide denominators it is difficult to directly assess a response rate for part- and full-time teachers and assistant teachers in North Carolina child care centers. The sum of teaching staff reported in the 4,095 centers on the 2015 license file is 30,246. The estimated statewide population of teaching staff based on weighting using only the 1,075 randomly sampled cases that were attempted while weighting them up to the state population of 4,095 centers is somewhat smaller (N=28,052). The estimate from the director's survey responses of the number of teaching staff that should have received surveys (N= 30,464) is somewhat larger. The estimate derived from the application of the center level weights to the 761 director survey respondents is quite similar to the aggregate total on the license file (N=30,246).

We chose to report the estimates of the statewide teacher populations in Tables 1 and 2 of this report using licensing data (N=30,246), but used a very slightly larger number as the basis for the teaching staff survey estimates. That number (N=30,355) is the geometric mean of the license aggregate estimate (N=30,246) and the upweighted estimate based on the number of teachers specified by the 761 director in their surveys (N=30,464). This is consistent with a slight increase in size over the time period when the sample was drawn and when inquiries were made of directors about their current teaching staff size. The statewide estimate of 30,355 was used as the basis for weighting up teaching staff survey respondents to represent a statewide population. Hence, we chose to rescale all the teaching staff survey weights to add up to this number and to describe the statewide population of teaching staff as being generally in the range of 30,250 to 30,460. Teaching staff survey responses were weighted up to reflect the probability of selection and response at the center level to reflect the known number of licensed centers in North Carolina at the time the sampling frame was constructed in 2015.

Weighted statewide estimates of various components of the total teaching staff size (i.e., all full and part time teachers and assistants) were calculated based on directors' survey responses but those totals are not reported in this report. Invariably these statewide estimates were larger, often significantly larger, than the numbers generated using the other methods described above. This is probably due largely to inconsistent recording of the part-time segment teaching staff workforce. This number is difficult to specify, and varies somewhat depending on how "part-time" and how "intermittent" these workers are at a given center, and how the center and the individual workers define themselves, and whether or not they can be unduplicated from survey or license data if they work at several centers. Although it is more difficult to assess the number of different persons falling in the category of "part-time", these types of individuals are probably less likely than their full time counterparts to be included in the dataset generated from the teacher surveys and reported on here. The extent to which these part-time workers have jobs in other settings, consider their child care work a "second job," or actually identify with or aspire to careers in child development is not well understood. Although it would be possible to perform a separate analysis of part time teaching staff, it would be difficult to draw meaningful conclusions from examination of an extrapolation from the small number of cases available in the teaching staff survey database.



## Appendix C

### Definitions of Terms

**Child Care Centers:** an arrangement where, at any one time, there are three or more preschool-age children or nine or more school-age children receiving care. (from Child Care Center Handbook produced by the Division of Child Development and Early Education, 2009) Centers may be found in community buildings, churches or synagogues, buildings built specifically for child care, in private homes or in public buildings.

**Child Care WAGE\$® Project:** This program provides salary supplements that are linked to the education level of participants and are paid every six months as long as participants remain in the same child care program. ([www.childcareservices.org](http://www.childcareservices.org))

**Degree:** either an associate degree, bachelor's degree, master's degree or Ph.D. from an institute of higher learning.

**Degree in ECE:** an associate, bachelor's, master's or Ph.D. in either early childhood education or child development.

**Degree in other:** an associate, bachelor's, master's or Ph.D. in a field of study other than early childhood education or child development.



**For-profit centers:** Child care centers ranging from single-classroom facilities consisting of a multi-age group of children and one teacher/director to multi-site facilities enrolling hundreds of children and employing a director, assistant director, lead teachers and assistant teachers that are operated as sole proprietorships, partnerships, or corporations with the goal of making a profit for their owner or stockholders.

**Metropolitan, micropolitan and noncore rural geographic areas:** Geographic areas as defined by the U.S. Office of Management Budget. These areas do not equate to traditional definitions of urban and rural as many of these areas contain a mixture of both types of locations. These areas are defined by both size and location to other geographic areas and can change over time. See Appendix D for a list of NC counties and their geographic area.

**Median:** one of three measures of central tendency; the number representing the case which has equal cases above and below it. Throughout this report, "average" is used interchangeably with "median".

**NC Pre-K:** a community-based education initiative designed to prepare at-risk four-year-olds in North Carolina for success in school. Pre-kindergarten

classrooms operate for the school day and school year and are provided in diverse settings such as public and private schools, Head Start centers, and community-based child care centers and preschools. ([http://ncchildcare.dhhs.state.nc.us/providers/pv\\_providers.asp](http://ncchildcare.dhhs.state.nc.us/providers/pv_providers.asp))

**Non-profit centers:** Child care centers operated by a board of directors that govern the program, that is mission-driven and not operated with a goal of making a profit. These programs may be sponsored by community or faith-based organizations. Includes programs with a Notice of Compliance (GS-110) as well as centers with a star-rated license.

**People of color:** People who self identify as Asian, African-American, bi-racial, or American Indian/Native American.

**Public (sponsored programs):** Head Start sites, public school sponsored and other publicly funded programs.

**Star rated license system:** North Carolina's Star Rated License System awards stars to child care programs based on how well they are doing in providing quality child care. Child care programs receive a rating of one to five stars. A rating of one star means that a child care program meets North Carolina's minimum licensing standards for child care. Programs that choose to voluntarily meet higher standards can apply for a two to five star license. ([http://ncchildcare.dhhs.state.nc.us/parents/pr\\_sn2\\_slfaq.asp](http://ncchildcare.dhhs.state.nc.us/parents/pr_sn2_slfaq.asp))

**T.E.A.C.H. Early Childhood®:** This program provides comprehensive educational scholarships that help pay the cost of tuition, books, and travel, and may insure paid release time, require compensation incentives and encourage retention for child care providers working on a credential or degree in early childhood education or child development.([www.childcareservices.org](http://www.childcareservices.org))

## Appendix D

NC Counties By Type of Urbanization			
Metropolitan		Micropolitan	Rural
Alamance	Madison	Beaufort	Alleghany
Alexander	Mecklenburg	Camden	Anson
Brunswick	Nash	Carteret	Ashe
Buncombe	New Hanover	Cleveland	Avery
Burke	Onslow	Dare	Bertie
Cabarrus	Orange	Granville	Bladen
Caldwell	Pamlico	Halifax	Caswell
Catawba	Pender	Harnett	Cherokee
Chatham	Person	Jackson	Chowan
Craven	Pitt	Lee	Clay
Cumberland	Randolph	Lenoir	Columbus
Currituck	Rockingham	McDowell	Duplin
Davidson	Rowan	Moore	Graham
Davie	Stokes	Northampton	Greene
Durham	Union	Pasquotank	Hertford
Edgecombe	Wake	Perquimans	Hyde
Forsyth	Wayne	Richmond	Macon
Franklin	Yadkin	Robeson	Martin
Gaston		Rutherford	Mitchell
Gates		Scotland	Montgomery
Guilford		Stanly	Polk
Haywood		Surry	Sampson
Henderson		Transylvania	Swain
Hoke		Tyrrell	Warren
Iredell		Vance	Washington
Johnston		Watauga	Yancey
Jones		Wilkes	
Lincoln		Wilson	

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For more information about the 2014 Statewide Workforce Survey, please contact the Research Department at Child Care Services Association, (919) 967-3272 or [research@childcareservices.org](mailto:research@childcareservices.org).

This study was managed and co-authored by CCSA staff Jeff Lyons, Mary Martin, Sue Russell and Anna Carter.



# Working in Early Care and Education in North Carolina

**2015 Workforce Study**

**December, 2015**

**Child Care Services Association**



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