

# Working in Early Care and Education in North Carolina



**2011 Workforce Study**

**June, 2012**

**Child Care Services Association**



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Through funding from Z. Smith Reynolds, Child Care Services Association (CCSA) conducted a statewide survey of the early care and education workforce in North Carolina beginning in the spring and ending in early winter 2011. This study provides comprehensive data on teachers and directors and on the licensed early care and education facilities in which they work. Additionally, information gathered from this study is compared to a similar study conducted by CCSA in 2003.

Data for this report were collected through two linked surveys of samples of early childhood program directors and of teachers working in those programs conducted from March to November 2011. Useable surveys were obtained from a random sample (n=631) of all directors of licensed child care programs in North Carolina which constitutes about

15% of the population of all directors within each of the 14 Child Care Resource and Referral (CCR&R) regions<sup>1</sup>. A map of the regions can be found in the Appendix. Participating directors distributed surveys to their teaching staff and useable surveys were returned by 2,525 teaching staff out of

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an estimated 4,780 (53%). 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 population of centers (N=4,211) and an estimated teaching staff population of approximately 30,000. More information about the sampling design and survey execution is contained in the Appendix to this report.

The child care workforce in North Carolina has experienced improvements in the star rated license levels, the education level of directors and teachers/assistant teachers, centers providing fully paid health insurance and retirement, and teacher and director turnover. North Carolina has remained stagnant or suffered losses in the median and higher teacher/assistant teacher wage, the proportion of centers providing partially paid health insurance, paid vacation and holiday leave and in many professional support benefits (such as orientation, job descriptions, paid education/training, paid breaks, etc.). The constant challenge of supporting workforce professional development while raising wages and lowering turnover is clearly at play across North Carolina. State policymakers, funders and workforce initiatives can take some pride in the positive changes they have helped forge for the workforce. Hopefully North Carolina can continue to build on these successes as the state continues working on the perennial challenges facing its early care and education programs and providers.



Photo: Dave Parker

<sup>1</sup> Directors and teachers in programs that involved only school aged children (i.e. after school programs) were excluded from these surveys.



## Early Care and Education (ECE) Centers

The percentages of responding early care and education centers by their star ratings as compared to the overall population are shown in Table 1. "Under 3 Stars" includes 1- and 2-star licensed centers, GS-110 (Letter of Compliance) centers and centers with a temporary or provisional license. The star rating of study respondents closely reflects the distribution of sites by star ratings in the general population.

However, centers responding in 2003 looked different than those responding in 2011 when star rating and organizational structure are combined (see Table 2 and Figure 1). In this table, organizational categories were collapsed for simplification. (See appendix for information on grouping by organizational categories.) NC Pre-K programs (formerly More at Four<sup>3</sup>) are represented in all three organizational structures. Public pre-k programs that are not licensed were not included as part of this study.

**Table 1: Profile of Responding Centers vs. Overall Population of Centers in North Carolina, 2011**

	Survey Respondents	All Centers <sup>2</sup>
4 or 5 Stars	56%	56%
3 Stars	22%	22%
Under 3 Stars	22%	23%

\* Includes 1- and 2-star licensed centers, GS-110 (Letter of Compliance) and centers with a temporary or provisional license.

In terms of organizational structure, two major changes have occurred since 2003. First, pre-k programs in public schools were strongly encouraged and given grants to become licensed. Also during these years, the More at Four Program (now the NC Pre-K Program) was developed, requiring most pre-k programs in public schools that received this money be licensed. Based on these two changes, the percent of licensed public sponsored programs has dramatically increased.

**Table 2: Organizational Structure of Centers Responding in 2003 vs. 2011**

	2003 Responses	2011 Responses
For profit Centers	59%	54%
Non-Profit Centers	31%	24%
Public Sponsored	10%	22%

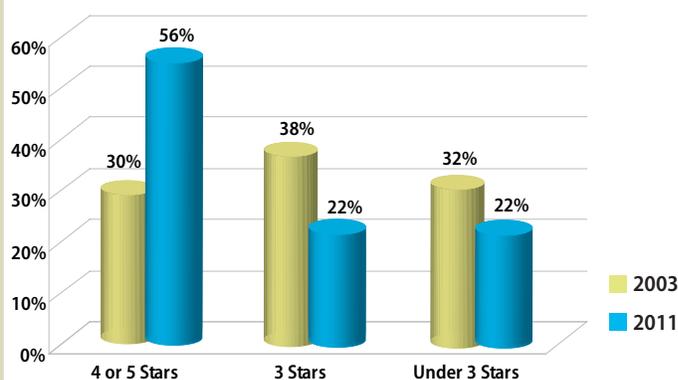
However, the percent of birth to five year old children enrolled in public sponsored programs remains low. Because licensed public schools often only have one or two classrooms and these classrooms are typically smaller than in most centers, the majority of birth to five year old children in licensed child

care are found in private settings. Public sponsored centers responding to the 2011 survey enroll only 19% of the corresponding children overall. Non-profit centers enroll 27% and for

profit program enroll the largest majority of birth to five year old children at 54%.

**Figure 1**

**License of Centers Responding: 2003 vs. 2011**



Similarly, changes have occurred since 2003 which have affected star ratings. Since the previous study, license requirements and distribution by stars has changed. The overall star ratings in North Carolina's early care and education system have dramatically improved (see Figure 1). The investment in technical assistance, professional development and support for providers has paid off in increased quality as indicated by star levels. Programs have used the resources provided



<sup>2</sup> Data from NC Division of Child Development and Early Education (DCDEE), February 2011.

<sup>3</sup> In the Fall of 2011, the More at Four program was restructured and renamed NC Pre-K. Throughout this report NC Pre-K primarily will be used.

by Smart Start, the CCR&R system, T.E.A.C.H. Early Childhood® Project and NC Pre-K to make real progress in improving classrooms and centers.

**Star Rating and Organizational Structure of Regions.** Early care and education enrollment in star ratings and organizational structure of programs responding to the survey in the regions sometimes mirrors the State averages and other times differ greatly (see Table 3).

**Table 3: Birth to Five Enrollment by Star Rating and Organizational Structure of Responding Programs by Region**

	Star Rating			Organizational Structure		
	Under 3 Stars	3 Stars	4 or 5 Stars	For Profit	Non-Profit	Public
Region 1	35%	53%	12%	51%	40%	9%
Region 2	33%	8%	59%	56%	9%	35%
Region 3	35%	19%	46%	42%	36%	22%
Region 4	30%	22%	48%	52%	17%	31%
Region 5	15%	32%	53%	48%	40%	12%
Region 6	22%	6%	73%	66%	28%	6%
Region 7	19%	14%	68%	56%	31%	13%
Region 8	3%	12%	85%	31%	39%	30%
Region 9	8%	5%	87%	50%	12%	38%
Region 10	19%	25%	57%	65%	18%	17%
Region 11	11%	13%	76%	58%	25%	16%
Region 12	24%	16%	60%	60%	23%	17%
Region 13	21%	23%	56%	45%	33%	22%
Region 14	4%	28%	68%	30%	23%	48%
Statewide	20%	17%	63%	54%	27%	19%

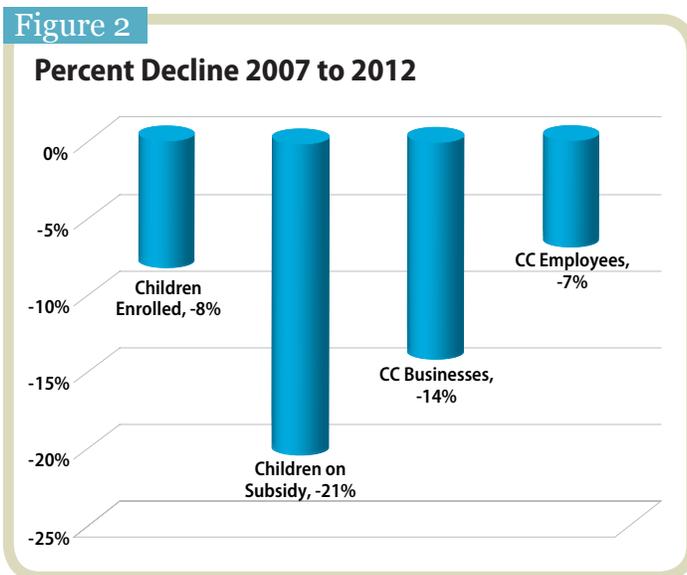
The overall quality of programs that children receive by regions differs greatly across the State. Region 1 tends towards lower overall star ratings with 35% of responding programs' birth to five enrollment being under 3 stars and only 12% at 4 or 5 stars. On the other end of the scale, programs responding to the survey in Region 9 reflected only 8% of birth to five enrollment being under 3 stars and 87% of enrollment at 4 or 5 stars. Likewise, Region 8's enrollment in 4 or 5 star programs is at 85% with only 3% of children birth to five in programs with less than 3 stars. Closely matching the statewide average is Region 7 with 19% of early care and education enrollment under 3 stars, 14% at 3 stars and 68% at 4 or 5 stars.

In terms of organizational structure, most regions do not resemble statewide averages though Region 11 looks the most similar to the state overall. Region 6 has far fewer early childhood children enrolled in licensed public settings (6%) and far more in for profit programs (66%) than the state as a whole. Region 14 has the highest enrollment in public settings at 48%.

**Impact of the Economy.** At this point in history, our country is mired in one of the worst economic times since the Great Depression. Unemployment, though slightly improved, is at high levels not seen in decades. Child care centers have not been spared these hard times. With the downturn of the economy, thousands of child care slots have been lost (see Figure 2) resulting in the closing of programs. Significant differences in both star ratings and organizational structures since 2003 may account for some of the changes in the data presented throughout this report.

Significant losses can be noted on both the child and business level<sup>4</sup> (see Figure 2). On the child level, in just the past five years, a 21% decrease in children receiving subsidy has occurred along with an 8% drop in enrollment. Results from the 2011 study show a median of 34 children ages birth to five (not including school-agers), slightly lower than the 36 indicated in 2003.

These losses have contributed to a 14% decline in early care and education businesses and a corresponding 7% decrease in child care employees. Study results in 2011 indicate that centers employed a median of 4 full-time teachers. When looking at total teaching staff, full- and part-time teachers and assistant teachers, centers employ a median total of 6 teaching staff.



<sup>4</sup> Data from DCDEE Statistical and Summary Report January 2007 and January 2012 except Subsidy information, November 2011.



Directors also report other areas in which the failing economy has affected their programs. When asked, 85% of directors said that the economy has had some type of effect on their programs. Over a third (39%) reported that parents are behind in fees. Nearly half (43%) are not buying needed equipment or materials. For many, enrollment is down or they have “lost” children (10% wrote this in as another way the economy has impacted their program). This situation has resulted in 21% of centers reporting that they have had to close classrooms (with 1% writing in that they may close their programs and 3% reporting that they have had to cut hours). These downturns are then passed on to staff in the form of layoffs (16%), stagnant salaries (56%) and cutting staff

salaries (including cutting individual staff hours) and/or benefits (6% wrote in benefits as another way the economy has impacted their program).

**Staffing.** The child care center staff that participated in the survey represented a wide variety of positions in the early childhood field and worked with children of all ages. Weighting those responses to represent the total director population yielded results that show titles such as director (58%), director/owner (28%) and other positions (14%). Many of these “other positions” included principal and More at Four coordinator, a direct result of NC Pre-K programs contained within public schools.

As for staff who completed a teacher survey, 74% identified themselves as teachers or lead teachers, 24% were assistant teachers, teacher’s aides or floaters and 2% held other positions. Nearly half of those filing out the teacher survey indicated that they work with infants, toddlers or twos at least some of the time (49.6%). The other 50.4% indicated that they work only with older children.

**Wage Scales.** Center directors reported wage scales for center teaching staff that included low starting wages and limits on the highest wages paid to teachers and assistants (see Table 4). Starting teachers earned a median \$9.00 per

**Table 4: Salaries in Child Care Centers in North Carolina**

	2003 Wage in 2011 Dollars <sup>5</sup>	2011 Wage	Percent Change (2003-2011)	Annual Change 2003-2011
Starting Teacher Wage in Center	\$8.56	\$9.00	5.14%	0.73%
Highest Teacher Wage in Center	\$10.39	\$11.25	8.28%	1.18%
Starting Assistant Teacher Wage in Center	\$7.70	\$8.00	3.9%	0.56%
Highest Assistant Teacher Wage in Center	\$8.56	\$9.50	10.98%	1.57%

Notes: Median wages are reported. Data are based on directors’ reports.

hour compared to only \$7.00 in 2003. In 2011 dollars, this would be \$8.56. This represents an average yearly increase of 0.73%. For assistant teachers, the median starting salary of \$8.00 per hour for assistant teachers compares to the similar salary of \$6.30 per hour in 2003. In 2011 dollars, this would be \$7.70, showing an increase of 0.56% each year. Assistant teachers and substitute caregivers continued to earn lower wages than other teaching staff.

That wages have grown slightly faster than the US Price Inflation (CPI-U) is not surprising. First, during this period the federal minimum wage increased from \$5.15 per hour to \$7.25 per hour. Second, with the infusion of NC Pre-K classrooms, mandated compensation levels have increased wages at the highest levels for licensed Birth-Kindergarten (B-K) teachers in those classrooms.

<sup>5</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)

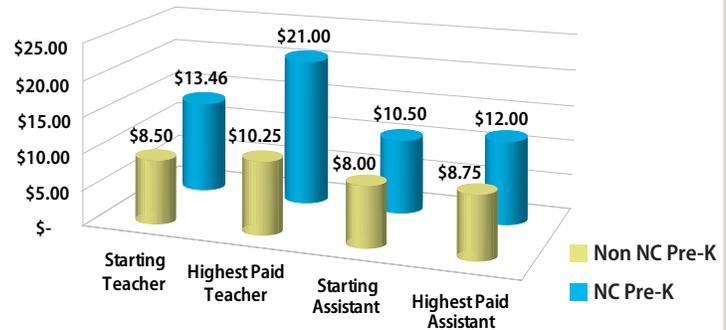
In fact, licensed early care and education programs with NC Pre-K classrooms have higher wages at all levels as shown in Figure 3. For starting teachers and assistant teachers and for highest paid teachers and assistant teachers, working in settings with an NC Pre-K classroom results in a higher salary. The difference is far greater for the highest paid teachers (105% higher in settings with an NC Pre-K classroom) but is still substantial at the starting assistant teacher level (31% higher in settings with an NC Pre-K classroom).

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 must be compensated comparably to licensed teachers in public schools. Given these criteria, the fact that higher license levels overall yield higher starting salaries for both teachers and assistant teachers comes as no surprise (see Figure 4).

Both teachers and assistant teachers who work in higher star rated programs earn higher wages. While those working in 4 star programs certainly fare better than those in 3 star programs or below, teachers and assistant teachers in 5 star programs far surpass the salaries of their counterparts in other licensed programs. Thirty percent (30%) of 4 star programs and 60% of 5 star programs have at least one NC Pre-K classroom.

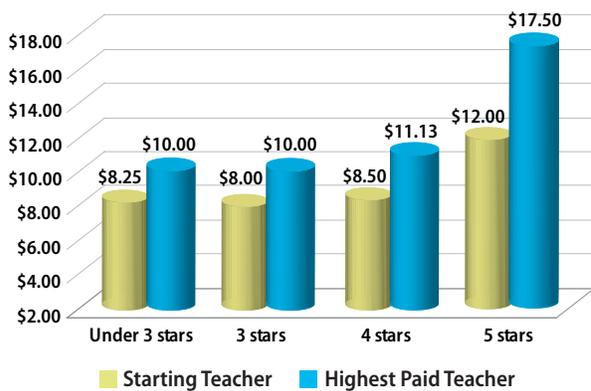
**Figure 3**

**Median Salary Comparison in NC Pre-K and Non NC Pre-K Centers**



**Figure 4**

**Median Hourly Teacher Wages by License**



**Wage Scales of 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 living in Region 1 can expect median starting salaries around \$8.00/hour and highest salaries of \$9.50/hour. On the other end of the spectrum, in Region 9, median starting salaries hover around \$11.00/hour with salaries peaking around the \$14.00/hour mark. These high and low regions come as no surprise given that Region 1 had the lowest responding star level and



Photo: Senator Kate Lundy



**Table 5: Median Wage Scales in ECE Centers by Region**

	Starting Teacher	Highest Teacher	Starting Assistant	Highest Assistant
Region 1	\$8.00	\$9.50	\$7.27	\$8.00
Region 2	\$8.43	\$11.59	\$8.00	\$8.00
Region 3	\$8.00	\$10.00	\$8.00	\$9.00
Region 4	\$8.00	\$10.00	\$7.80	\$8.75
Region 5	\$8.00	\$10.00	\$7.40	\$8.50
Region 6	\$9.00	\$11.50	\$8.50	\$10.00
Region 7	\$8.00	\$10.50	\$7.50	\$8.50
Region 8	\$9.00	\$12.50	\$8.00	\$9.98
Region 9	\$11.00	\$14.00	\$10.00	\$11.63
Region 10	\$9.00	\$11.22	\$8.00	\$9.37
Region 11	\$8.50	\$10.06	\$8.00	\$9.00
Region 12	\$10.00	\$13.00	\$8.50	\$10.50
Region 13	\$8.00	\$10.00	\$7.75	\$8.04
Region 14	\$8.25	\$10.50	\$7.80	\$9.00
Statewide	\$9.00	\$11.25	\$8.00	\$9.50



Region 9 had the highest star level and that star levels have been shown to relate to teacher wages.

**Employment Benefits.** Employment benefits offered by centers in North Carolina are shown in Table 6. The percent of programs offering fully paid health insurance increased significantly from 2003 to 2011 (14% to 21%). Increases in public pre-k programs have contributed to this gain (see Figure 5). However, those programs providing partially paid health insurance decreased from 33% to just 30%. This results in a net increase of programs that provide some type of financial help with health insurance (47% in 2003 versus 51% in 2011).

Paid time off has also changed since 2003. Though the centers offering paid sick leave increased from 60% to 67%, those programs offering other paid leave decreased slightly. Centers offering paid vacation dropped slightly, from 88% to 86% and programs offering paid holidays went from 91% to 90%.

While there was a small increase in the number of programs that offer free child care (8% to 10%) there was a more dramatic increase in the percent of programs that offer some relief from the high cost of child care through reduced fees (47% to 55%). An even bigger increase can be seen in those programs offering parental leave which jumped from 38% to 56% in 2011.

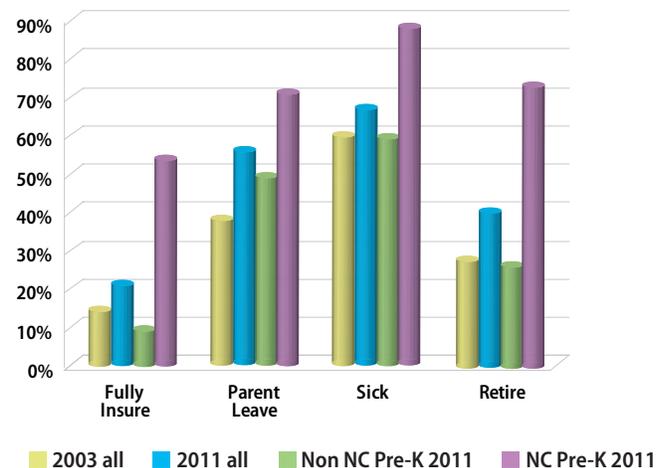
As mentioned, public pre-k programs have contributed to increases in many types of benefits as noted in Figure 5. Working in sites with an NC Pre-K classroom increases your opportunity to receive full health insurance, parental leave, sick time and

**Table 6: Employment Benefits in Child Care Centers in NC**

	2003	2011
Fully Paid Health Insurance	14%	21%
Partially Paid Health Insurance	33%	30%
Free Child Care	8%	10%
Reduced Child Care Fee	47%	55%
Parental Leave	38%	56%
Paid Sick Leave	60%	67%
Paid Vacation	88%	86%
Paid Holidays	91%	90%
Paid Retirement Benefits	27%	40%

**Figure 5**

**Benefits in Sites with NC Pre-K Classrooms and Sites with No NC Pre-K Classrooms**



retirement. As Figure 5 indicates, NC Pre-K programs are the drivers for increasing the overall benefits provided in 2011 in these areas from programs offering these benefits in 2003.

Whether or not a child care provider receives any support with health insurance (as well as other benefits and their wages) relates to the organizational auspice of the program in which she works (see Table 7). Nearly all providers who work in publicly sponsored programs receive either free or reduced health insurance. Similarly, these centers have an average starting and highest wage that exceeds that of any other type of program. Those working in non-profits (excluding those sponsored by faith communities) fell just under public employees with 67% receiving full or partially paid health insurance and the next highest average wages. On the other end of the scale, employees in single center, for-profit programs had a median starting salary of just \$8.00/hour (average highest salary of \$10.00) and only 21% received support with health insurance.

**Table 7: Health Insurance and Wages by Program Auspice**

Type of Center	Pct Employers Who Pay at Least Part Health Insurance	Median Starting Teacher Wage	Median Highest Paid Teacher Wage
Private for profit (single center)	20.7%	\$8.00	\$10.00
Private non-profit (sponsored by faith communities)	35.4%	\$8.50	\$10.44
Private for-profit (multi-center)	54.1%	\$9.00	\$11.04
Private not for-profit (comm./board sponsor)	66.5%	\$8.50	\$12.00
Head Start	100%	\$11.68	\$16.00
Public School Program	100%	\$17.69	\$34.34
Other Public Pgm. (Mental Health, Comm. College)	100%	\$11.75	NA
Total (estimates weighted to Statewide Totals)	51.3%	\$9.00	\$11.25

These wage findings reflect similar national findings from the Government Accountability Office which found low wages among all child care providers but higher pay for individuals working in publicly funded programs such as Head Start.<sup>6</sup>

Among teaching staff that had ever worked over 40 hours per week (42%), 50% said that their centers paid them time and a half for the overtime hours that they worked. When directors were asked about their teaching staff, 46% said that their teachers sometimes work over 40 hours per week. Sixty-six percent (66%) 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 salary. 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.

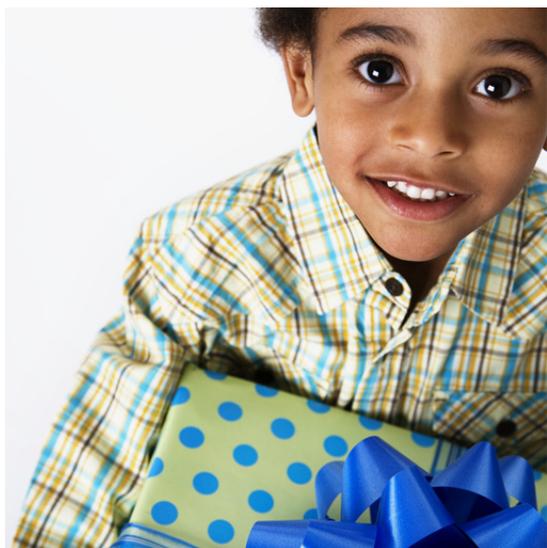


Photo: Stambord Museum & Nature Center

<sup>6</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."

## Profile of the Early Care & Education Workforce

The early care and education workforce in North Carolina is overwhelmingly female and includes a large proportion of workers who have children of their own (see Table 8). Among the teaching staff who have children, 24% indicated that their children were enrolled in the centers where they work. Of these respondents, 76% received free or reduced child care from the center; 20% received government assistance to help them pay for child care (note: respondents can receive both kinds of assistance). Just under half of the teaching staff in centers are people of color while a lower percent of center directors are non-white. The overall percentage of people of color leading early care and education programs has increased by 13% in the last eight years. While the percent of teachers and assistants whose annual family income is under \$30,000 has decreased since 2003, the 59% whose income remains under \$30,000 face even more severe economic hardships than those in 2003 given the increase in the cost of living in the eight year period.

**Table 8: Demographic Profile of the Child Care Workforce in North Carolina**

	Center Directors		Teachers and Assistants	
	2003	2011	2003	2011
Median Age	43	46	33	36
Female	97%	97%	99%	99%
People of Color	38%	43%	49%	48%
Have Children	89%	89%	73%	74%
Single Parent w/Child 0-18	10%	9%	28%	18%
At Least One Child 0-18	53%	49%	54%	52%
Annual Family Income < \$30,000	23%	15%	63%	59%

## Education of the Early Care and Education Workforce

The education of the early care and education workforce is a critical factor influencing children's early learning opportunities. 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). Gains in degree-earning providers are a positive sign that the workforce is advancing its education to meet the needs of young children.

**Table 9: Education of Center Directors and Teachers/Assistant Teachers**

	Center Directors		Teachers and Assistants	
	2003	2011	2003	2011
<b>Highest Education Completed</b>				
Bachelor Degree or More in ECE/CD	10%	19%	4%	11%
Bachelor Degree or More in Other Field	22%	32%	10%	13%
Associate Degree in ECE/CD	13%	20%	10%	19%
Associate Degree in Other Field	5%	4%	4%	5%
High School + Any College Courses	46%	25%	55%	48%
High School + Workshops	1%	<1%	3%	2%
High School Only	3%	<1%	13%	2%
Less than High School	0%	0%	2%	<1%
<b>Other Education Credentials</b>				
N.C. EC Credential	62%	69%	68%	75%
N.C. EC Administration Credential	78%	73%	15%	20%
Child Development Associate (CDA)	9%	9%	7%	9%
B-K/Preschool add-on	3%	10%	2%	8%
<b>Educational Pursuits</b>				
Currently Taking ECE/CD Courses	31%	20%	32%	28%

Center directors have completed higher levels of education than teachers, though both groups do not match the minimum education requirements for teachers and administrators in public elementary, middle and high schools. While 39% of directors and 30% of teachers and assistant teachers have a degree in early childhood education, others (36% of directors and 18% of teachers and assistants) have a degree in a field other than early childhood or child development. Some of these directors (34%) and teachers/assistant teachers (15%) however, have a college degree in fields other than early childhood education or child development and have taken at least one course in the field.

North Carolina's early care and education workforce has a strong interest in achieving higher levels of education. As shown in Tables 9 and 10, many directors and teachers had completed college courses. Furthermore, 28% of the teachers and assistants said that they were currently taking courses leading to a degree or credential in the early childhood field. Among all teachers and assistants, 19% were working towards a two-year degree or higher.

In 2011, 75% of directors and 48% of teachers and assistants indicated that they had attained an associate, bachelor's or master's degree in some field.<sup>7</sup> In comparison, 50% of directors and 28% of teachers and assistants in 2003 had earned an associate, bachelor's or master's degree in some field. Additionally, 10% of directors and 8% of teachers and assistant teachers have B-K/Preschool add-on Teacher Licensure compared to just 3% of directors and 2% of teachers and assistant teachers in 2003.

**Table 10: Education of Teachers and Assistant Teachers**

	Teachers	Assistant Teachers
<b>Highest Education Completed</b>		
Bachelor Degree or More in ECE/CD	13%	5%
Bachelor Degree or More in Other Field	14%	11%
Associate Degree in ECE/CD	20%	16%
Associate Degree in Other Field	4%	7%
High School + Any College Courses	47%	50%
High School + Workshops	1%	4%
High School Only	1%	5%
Less than High School	<1%	<1%

**Center-Based Direct Teaching Staff Education.** Education levels of teachers and assistant teachers vary dramatically (see Table 10). When combined, 48% of teachers and assistant teachers have received at least a two years degree in some field as noted above in Table 9. However, when the two groups are separated, 51% of teachers and only 39% of assistant teachers have such a degree. Further differences can be noted in Table 10.



Investments in the early care and education system have paid off dramatically over time in terms of increased education levels of teachers specifically around early care and education coursework. Figure 6 shows the dramatic increase both in overall educational attainment and in specific types of degrees. In 2001, a mere 20% of teachers had attained at least an associate degree in early childhood/child development. By 2011, this percent had more than doubled to 46%.

Similarly, there has been a dramatic increase in both associate and bachelor's degrees specifically in early childhood/child development. While 2001 showed only 10% of teachers with degrees specifically in the field, 2011 reveals that a full 33% of teachers have obtained degrees specifically in the profession.

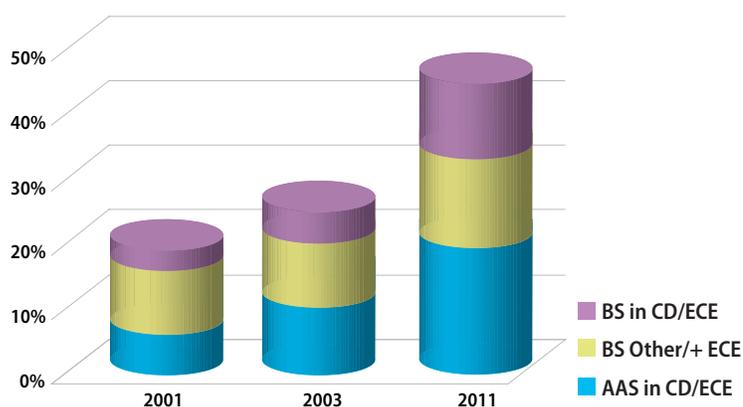
Also increasing, though not as dramatically, are teachers who have at least a bachelor's degree in a field other than early childhood/child development who have taken at least one early childhood education course. The percent of teachers falling into this category increased from 10% in 2001 to 13% in 2011. The overall effect of all of these increases in education has resulted in a workforce that is better educated specifically in the field of early childhood education.

### Education of 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

**Figure 6**

### Teacher Education Gains Over Time



<sup>7</sup> These percentages may not equal the sum of the percentages in Table 9 due to rounding.

teachers (ages of children from birth to 36 months) tend to have lower levels of education than those who teach three year olds or older. Many 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. Sixty percent (60%) of those teachers who taught preschoolers had at least a two year degree compared to only 40% of those teachers who taught infants and/or toddlers. Forty-two percent (42%) of preschool teachers hold degrees in early childhood education/child development, compared to only 26% of infant and/or toddler teachers.

Similarly, for assistant teachers, 54% of those who taught preschoolers hold at least an AA degree compared to only 30% of infant and/or toddler teachers. In terms of field of study, 26% of preschool assistant teachers hold early childhood education/child development degrees compared with only 14% of infant and/or toddler assistant teachers.

**Education by Regions.** Across the state, education levels of directors and teachers vary by region (see Table 11).

**Table 11: Education Levels by Region**

	Directors				Teachers/Teacher Assistants			
	Less than AA degree	AA degree	Greater than AA degree	ECE Degree	Less than AA degree	AA degree	Greater than AA degree	ECE Degree
Region 1	29%	35%	36%	23%	69%	19%	13%	23%
Region 2	27%	27%	46%	64%	54%	32%	15%	41%
Region 3	37%	17%	47%	46%	56%	19%	25%	31%
Region 4	19%	22%	59%	38%	47%	28%	25%	35%
Region 5	26%	30%	44%	38%	53%	29%	19%	30%
Region 6	29%	26%	46%	37%	54%	20%	26%	27%
Region 7	30%	32%	38%	32%	70%	19%	11%	20%
Region 8	16%	21%	63%	37%	41%	32%	26%	37%
Region 9	22%	12%	66%	31%	51%	24%	24%	33%
Region 10	25%	24%	51%	46%	52%	29%	19%	35%
Region 11	34%	20%	46%	34%	47%	26%	27%	32%
Region 12	22%	17%	61%	40%	53%	16%	31%	23%
Region 13	25%	29%	46%	39%	49%	32%	20%	38%
Region 14	15%	39%	47%	43%	47%	42%	11%	47%
Statewide	26%	24%	51%	39%	52%	24%	24%	30%

Regions 1 and 7 have the lowest overall levels of education for directors and teachers/teacher assistants. Similarly, these regions have a low percentage of child care employees with a degree specifically in the ECE field.

Higher levels of education can be seen in a number of regions. For directors, Regions 8, 9 and 12 have over 60% of directors with a bachelor's degree or higher.



However, Region 8 has the highest percent of degreed directors overall at 84%. When looking specifically at ECE degrees, nearly all of Region 2's degreed directors hold a degree in the ECE field with 64% of their 73% of directors with this type of degree.

For teachers and assistant teachers, again Region 8 leads the way with the most degreed at any level at 58%. Region 12, however, has the highest percent of bachelor degree or higher teachers/assistant teachers at 31%. Region 14 has the highest percent of ECE degreed teachers/assistant teachers at 47%.

## Earnings of the Early Care and Education Workforce

Workforce earnings in North Carolina remain low (see Table 12). The median self-reported wage of child care teachers

**Table 12: Self-Reported Earnings of the Early Care and Education Workforce**

	2003 Wage in 2011 dollars <sup>8</sup>	2011 Wage	Percent Change 2003-2011	Annual Change 2003-2011
90th pctlile wage: Teacher & Asst Teacher	\$14.67	\$14.42	-1.70%	-0.24%
50th pctlile wage: Teacher & Asst Teacher	\$9.84	\$9.81	-0.30%	-0.04%
10th pctlile wage: Teacher & Asst Teacher	\$7.33	\$7.50	2.32%	0.33%
90th pctlile wage: Director	\$22.92	\$25.50	11.26%	1.61%
50th pctlile wage: Director	\$14.67	\$15.00	2.25%	0.32%
10th pctlile wage: Director	\$9.23	\$10.00	8.34%	1.19%

and assistants in North Carolina does not compare favorably to the starting wage of public school teachers in the state (\$17.69 per hour not including local supplements). Child care center directors' median self-reported wage barely competes (though still 18% lower at the 50th percentile) with that of the public school teachers despite the added responsibility of running a business. With such low wages, it is no wonder that early care and education teachers (9% of teachers and 14% of assistant teachers) said that they worked another paid job in addition to their job as a teacher. The median number of hours worked in these additional jobs was 15 for teachers and 13 for assistants.

In 2011, the median salary for directors was \$15.00. This compares to 2003 in which the median director salary was \$12.00. In 2003, the median teacher and assistant teacher salary was \$8.05 per hour, in 2011, salaries increased to \$9.81



per hour. According to the Consumer Price Index, center directors' salaries at the 10th, 50th and 90th all exceeded the inflation rates from 2003-2011. As shown in Table 9, directors' salaries have increased substantially compared to teacher and assistant teacher salaries. While this large increase, specifically at the high end, can be contributed in part to salary increases in centers with an NC Pre-K classroom, salaries in centers with no NC Pre-K classrooms also increased at levels above inflation rates.

For teachers, the story is a bit different. For the highest paid teachers, those paid at the 90th percentile or \$14.42/hour, their salaries did not keep up with inflation which would have suggested a pay rate of \$14.67/hour. At the 50th percentile, teacher salaries of \$9.81/hour were only slightly below the expected salary of \$9.84/hour. On the low end of the scale, teachers at the 10th percentile, making \$7.50/hour seem, at first glance, to have fared best at 2.32% above the inflation adjusted salary of \$7.33/hour. This increase was advanced by the three minimum wage increases totaling \$2.10/hour from

2003-2011. Upon closer examination, although teachers at this bottom level seem to have gained more than other teachers, in terms of real buying power, these teachers are actually living just 3% above minimum wage as opposed to the 17% above that these teachers experienced in 2003. (Using 2003 salaries that are adjusted for 2011 wages, teachers would have been at 14% above today's minimum wage.)

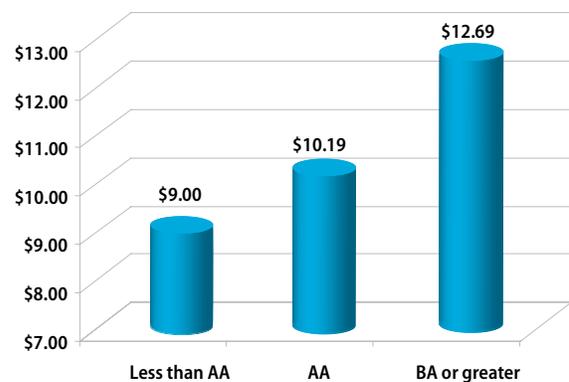
<sup>8</sup> Adjusted for CPI using wage calculator from the BLS Website. [http://www.bls.gov/data/inflation\\_calculator.htm](http://www.bls.gov/data/inflation_calculator.htm)

As would be expected, educational level plays a role in teacher and assistant teacher wages. Figure 7 shows, when all fields of degrees are combined, the more education teachers (only) receive, the higher their paycheck. Having an associate degree raises the median paycheck by \$1.19/hour. Jumping from an associate to a bachelor's degree or higher yields a median paycheck that is \$2.50/hour higher than the average paycheck for the lower degree.

When these degree types are broken down, the results show that even those teachers and assistant teachers with any post-secondary education receive higher wages than those with less than some formal coursework after high school. Assistant teachers with no formal coursework beyond high school (only workshops) average \$8.25/hour. Their counterparts who have between one and five courses to their credit make an average of \$8.50/hour. With an associate degree in early childhood this figure jumps to a median \$10.09/hour (\$9.62 for an associate degree in another field). Educational attainment appears to be consistently and incrementally rewarded, even if the amounts of increases are small.

**Figure 7**

**Median Teacher Wage by Degree**



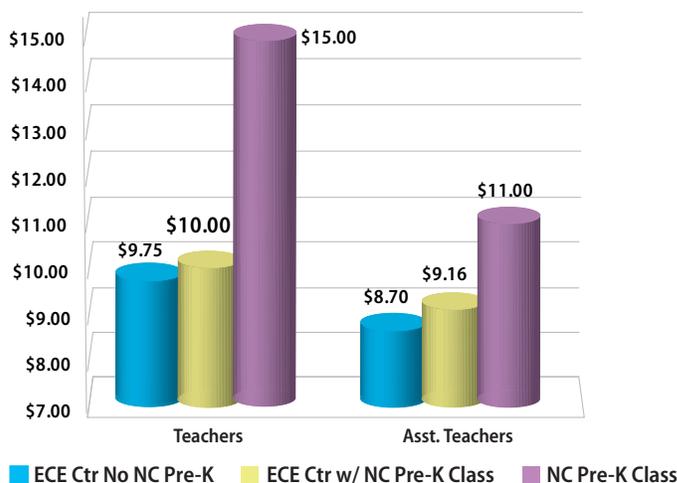
Likewise, taking formal post-secondary coursework provides a financial reward for teachers who have a median salary of \$9.00/hour with one to five courses as opposed to teachers with only workshops to their credit who average just \$8.50/hour. For teachers, a degree specifically in early childhood/child development provides the biggest financial gain. While there is no difference in median pay between teachers taking any post-secondary coursework and those that have a degree in a field other than early childhood (\$9.00/hour), an early childhood associate degreed teacher makes a median average of \$10.35/hour.

Of note, for the average teacher, pursuing degrees beyond a bachelor's degree in a similar field does not advance wages. Teachers with a bachelor's degree in a field other than early childhood/child development average the same salary as teachers with a master's degree in a field other than early childhood/child development (\$12.00/hour). For teachers with a bachelor's degree in early childhood/child development, the median salary is \$13.84/hour as opposed to teachers with a master's degree in early childhood/child development who average \$13.52/hour. However, there are relatively few teachers with the latter qualifications.

NC Pre-K is a significant factor in teacher pay. As Figure 8 outlines, for both teachers and assistant teachers, being in

**Figure 8**

**Median Self Reported Wages in Centers with and without NC Pre-K Classrooms**



a center with a NC Pre-K classroom and/or teaching in an NC Pre-K classroom increases your opportunity for a larger paycheck. State policy mandates higher salaries 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 directive for those in non NC Pre-K classrooms operated by centers that also have NC Pre-K classrooms. However, data indicate that there has been a positive impact for these teachers and assistant teachers as well. As Figure 8 shows, teachers who work in early care and education programs that have an NC Pre-K classroom, but who themselves do not work in that classrooms, make \$0.25 more per hour than teachers in programs without such a classroom. For assistant teachers, the difference is even greater at \$0.46 per hour.



**Earnings of Teachers by Age Group Taught.** For teachers and lead teachers, those who teach infants and/or toddlers had a median salary of \$9.50 per hour. Those teachers who taught preschool children fared better with a median salary of \$11.00 per hour. The same holds true for assistant teachers of infants and/or toddlers who make only \$8.50/hour compared to their preschool counterparts making \$9.62/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 earning of directors, teachers and teacher assistants by region. Region 1 has the lowest paid directors along with Region 14 at \$12.00/hour on average. Region 1 also has the lowest paid assistant teachers at \$7.40/hour. Region 14 pays their teachers the least at \$8.58/hour.

Highest paid directors can be found in Region 3 at a median average of \$18.27/hour. Teachers in Region 12 make the most across the state (\$11.25/hour) and assistant teachers in Region 13 top the scales at an average of \$10.38/hour. Region 13 data shows assistant teachers at a higher pay rate than teachers. Upon further analysis, this anomaly could be due to a large percent of assistant teachers who responded working in public settings, which tend to pay higher rates. Responding teachers in this region, on the other hand, are underrepresented in public settings and overrepresented in for-profit single center settings (which tend to pay a lower salary).

When compared to median starting teachers and highest paid teachers reported by directors, all regions with the exception of Region 2 fall within the range expected. Directors in Region 2, however, reported median starting teacher salaries of \$11.00/hour and average highest paid teacher salaries of \$14.00/hour. The median teacher salary reported by teachers in Region 2, however, falls significantly below that range at \$9.50/hour. For assistant teachers, a similar discrepancy can be found in six regions (Regions 4, 7, 8, 9, 11 and 13). Region 13 shows the largest discrepancy with directors reporting an average range of \$7.75/hour to \$8.04/hour and assistant teachers reporting an average median salary of \$10.38/hour. As stated earlier, responding assistant teachers in Region 13 disproportionately came from public settings which tend to pay higher rates.

**Table 13: Director, Teacher and Teacher/Assistant Median Earnings by Region**

	Director	Teacher	Teacher Assistant
Region 1	\$12.00	\$9.00	\$7.40
Region 2	\$12.18	\$9.50	\$8.00
Region 3	\$18.27	\$9.00	\$8.38
Region 4	\$13.01	\$9.33	\$8.83
Region 5	\$13.00	\$8.75	\$8.41
Region 6	\$15.00	\$11.00	\$9.48
Region 7	\$12.57	\$8.75	\$9.00
Region 8	\$17.00	\$10.68	\$10.19
Region 9	\$13.68	\$10.25	\$9.23
Region 10	\$15.86	\$9.00	\$8.92
Region 11	\$15.60	\$10.00	\$9.23
Region 12	\$15.50	\$11.25	\$9.55
Region 13	\$13.94	\$8.60	\$10.38
Region 14	\$12.00	\$8.58	\$8.39
Statewide	\$15.00	\$10.00	\$9.00

**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 child care workforce is at a significant disadvantage economically. Strictly in terms of household income alone, child care 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 is \$45,570.<sup>9</sup> For over 77% of child care teacher and assistant teachers, their household income falls below this amount.

But household earnings are not the only indicator of overall economic well being. Nearly a third (32%) of the teachers and assistants said that they had no health insurance coverage from any source. This is an increase from 2003 when 29% of teachers and assistant teachers had no health insurance from any source. Additionally, 40% of teachers and assistants had received some type of public assistance (e.g., Medicaid, Food Stamps, TANF) in the last three years. This is an increase compared to 2003, then 36% of teachers and assistant teachers received one or more forms of public assistance in the previous three years.

Table 14 breaks down the hard financial burden that teachers versus assistant teachers of our young children 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 teachers. Though a higher percentage of assistant teachers are employed in public sponsored programs (25% of assistant teachers vs. 14% of teachers), earnings for this group of employees remains below that of teachers. However, since basic benefits are provided uniformly across positions within programs, assistant teachers, who are more likely to be employed in public programs (which are more likely to offer health insurance to employees, see Table 7) are more likely to have health insurance than teachers.

**Table 14: Individual Economic Well Being of Child Care Providers**

	Teachers	Assistant Teachers
Median Hourly Earnings	\$10.00/hour	\$9.00/hour
Median Household Income	\$25K-\$30K	\$20K-\$25K
Single Parent with Child 0-18	18%	19%
No Health Insurance	33%	29%
Used Public Assistance in Past 3 Years	40%	39%
Work a 2nd Job	9%	14%

## 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 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, 55% of centers in North Carolina had at least one staff member that had ever received a T.E.A.C.H. scholarship. This is a decrease from the 64% reported in 2003. This decline may, in part, be due to an increasing percent of public programs that employ already degreed teachers not needing T.E.A.C.H. scholarships. On the teacher surveys, a proportion of teachers and assistant teachers (25%) said that they had received a T.E.A.C.H. scholarship. In 2003, 25% of teachers and only 22% of assistant teachers had received such a scholarship. Among respondents, nearly 100% of center directors and 96% of teachers and assistants had heard of the T.E.A.C.H. Early Childhood® Project.

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. Evaluation data show that 55% of T.E.A.C.H. Early Childhood® participants were not working on a degree before they learned about the Project. This inaction was due, not to lack of desire, but for 83% of participants, because they could not afford the cost of higher education. For Project participants, over 2/3 indicated that they are more satisfied with their jobs (67%).<sup>10</sup> Similarly, over 2/3 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 (67%).



Photo: WoodleyWonderworks

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.

<sup>10</sup> T.E.A.C.H. Early Childhood® Data received from participant evaluation received in 2011.

**Salary Supplements.** Among North Carolina teachers and assistant teachers, 35% received a salary supplement funded by Smart Start and the Division of Child Development and Early Education (down from 37% in 2003). According to Child Care WAGES information, the average mean six month supplement for all participants in 2011 was \$815.<sup>11</sup> Ninety-six percent (96%) of participants in the program indicate that WAGES encourages them to stay in their current program. Further, 95% say that the program helps them feel more satisfied with their job and 98% say that WAGES supplements help ease financial stress.

Child Care WAGES not only provides benefits for participants. Directors also realize the benefits with 73% indicating that the program increases morale and 70% specifying that lower turnover is a benefit. Finally, 47% of directors cite Child Care WAGES as a method to attract more qualified staff to their center.<sup>12</sup> 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, 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 2003, those programs providing these low cost benefits have fluctuated only slightly. Of note, fewer programs in 2011 offer paid breaks (56% in 2011 vs. 61% in 2003) however more programs offer paid preparation/planning time (67% in 2011 vs. 62% in 2003). Among the responding centers, 70% offered at least five of these types of support and 16% offered three or fewer. Providing a professional work environment may be a low-cost means for centers to prevent staff turnover. By comparison, in 2003, 71% of centers offered at least five types of support and 6% offered three or fewer.

**Table 15: Professional Support Benefits in Child Care Centers in North Carolina**

	2003	2011
Orientation	91%	90%
Written Job Description	92%	91%
Written Personnel Policies	90%	91%
Paid Education/Training	78%	76%
Paid Breaks	61%	56%
Time Off for Training	52%	55%
Planning/Preparation Time	62%	67%

## 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 and of less-experienced providers who have either just begun in the field or in a new child care program (see Table 16). Across the state, median experience in the child care field was 17.0 years for directors (who began working in the field at an average age of 27) 10.0 years for

teachers and 6.0 years for assistant teachers. In 2003 by comparison, directors had been in the workforce for 13.0 years while teachers indicated 5.9 years in the field and teacher assistants responded with slightly less experience of 5.3 years. These data indicate greater longevity in the field at all levels than in 2003.

The current survey included two measures of turnover: (1) for center-based teacher turnover, the percentage of child care teachers who left their centers during the previous year and (2) for individual directors and teachers, the percentage of workers who are planning

**Table 16: Child Care Workforce Experience in North Carolina**

	2003	2011
Teachers Years in Current Center	2.3	3.6
Teachers < One Year in Current Center	26%	19%
Teachers Years in Child Care Field	5.9	10.0
Assistant Teachers Years in Current Center	2.1	2.0
Assistant Teachers < One Year in Current Center	28%	31%
Assistant Teachers Years in Child Care Field	5.3	6.0
Directors Years as Director in Current Center	5.0	6.0
Directors Years in Child Care Field	13.0	17.0

<sup>11</sup> Child Care WAGES® data received from financial payments made to participants in 2011.

<sup>12</sup> Child Care WAGES® data from participant and director evaluations received in 2011.

to leave the child care field in the next 3 years (see Table 17). As a proportion of all full-time teachers and assistants, 18% left their centers during the previous 12 months. Turnover rates within centers ranged from 0% to 200% of full-time staff. Fifty-four percent (54%) of centers reported that they had no full-time staff turnover during the previous year while 4% of centers had turnover at or above 100% of current full-time staff. In 2003, 24% of full-time teachers and assistants left their centers during the previous 12 months. The full-time teacher annual turnover rate of 19% mirrors the 19% of teachers who have been in their programs less than one year as would be expected.

**Experience and Turnover by Age Group Taught.**

Not surprisingly, when controlling for age group taught, preschool teachers and assistant teachers show more experience both in their centers and in the field as a whole compared with infant and/or toddler teachers. Preschool teachers average



a median 4.0 years working in their

centers and 10.7 years experience in the early care and education field overall. Infant and/or toddler teachers have been in their programs just 3.3 years and in the field as a whole for 10.0 years on average. Though these differences do not seem significant, when comparing the mean years, the differences are far greater with preschool teachers averaging 12.3 years in the field and infant and/or toddler teachers averaging just 10.8 years.

When asked if they would be leaving the field within 3 years, just 18% of preschool teachers answered in the affirmative. For infant and/or toddler teachers, 23% responded that they may not be in the field in three years.

For assistant teachers, median years working in their current center for preschool teachers was 2.5 and 6.8 years in the child care field. Infant and/or toddler assistant teachers, however, showed just 2.0 years in their current program and 5.2 years in the field as a whole. (Many teachers and assistant teachers indicated that they taught multiple age groups spanning across infant and/or toddlers and preschoolers. In these cases, experience and turnover were counted in both age groups.)

**Experience in the 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 (see Table 18). Teacher time in their center ranges from 2.5 years in

**Table 17: Child Care Workforce Turnover in North Carolina**

	2003	2011
Full-Time Teacher and Assistant Teacher Turnover	24%	18%
Full-Time Teacher Turnover	24%	19%
Full-Time Assistant Teacher Turnover	24%	16%
Part-Time Teacher and Assistant Teacher Turnover	29%	22%
Part-Time Teacher Turnover	30%	20%
Part-Time Assistant Teacher Turnover	29%	24%
Teachers Leaving the Field in 3 Years	22%	21%
Infant/Toddler Teachers Leaving Field in 3 Years	na	23%
Preschool Teachers Leaving Field in 3 Years	na	18%
Assistant Teachers Leaving the Field in 3 Years	21%	24%
Directors Leaving the Field in 3 Years	9%	11%

**Table 18: Median Years of Experience by Region**

Region	1	2	3	4	5	6	7	8	9	10	11	12	13	14
Teachers-Center	3.0	6.2	2.8	5.0	3.3	3.0	4.3	3.9	3.3	4.0	4.1	3.6	2.5	4.0
Teachers-Field	8.0	10.3	11.4	10.0	9.3	10.0	11.0	8.5	7.7	11.0	10.5	10.0	9.7	11.0
Assistants-Center	1.6	2.3	0.9	3.7	3.0	1.3	2.6	2.2	1.4	2.8	2.3	1.3	1.7	2.5
Assistants-Field	2.6	4.3	4.8	6.0	7.0	6.0	5.0	7.0	6.0	8.0	6.3	4.8	5.0	8.0
Director-Center	7.8	8.9	5.0	8.0	6.5	7.6	7.0	6.8	5.0	7.0	5.0	5.0	6.0	5.1
Director-Field	13.8	14.0	17.3	14.2	19.0	17.0	18.0	18.2	15.7	17.0	16.0	17.0	14.4	18.0

Region 13 to 6.2 years in Region 2 with the statewide median average at 3.6 years. In terms of overall experience in the field, Region 9 has a low of 7.7 years for teachers and Region 3 has a high of 11.4 years (10.0 statewide average.)

For assistant teachers, the statewide average of 2.0 years in their center compares to a low in Region 3 of just under a year (0.9 years) to a high in Region 4 of 3.7 years. Experience in the field as a whole is greater for assistant teachers ranging

from 2.6 years (Region 1) to 8.0 years (Regions 10 and 14). The statewide average is 6.0 years for this population.

Directors, as would be expected, tend to have more years of experience both within their centers and in the ECE field. Several regions have directors with a low median average of 5.0 years in their centers (Regions 3, 9, 11 and 12). Region 2 has the longest staying directors in their centers at 8.9 years. The statewide median for directors is 6.0. Within the field, directors average 17.0 years statewide. In Region 1, they average just 13.8 years contrasting with Region 5 at 19.0 years.

**Workforce Retention.** Survey respondents who indicated that they planned to leave the field within 3 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 (see Table 19).

**Table 19: Motivators to Remaining in the ECE Field**

	Directors	Teachers	Teacher Assistants
Better pay	28%	81%	73%
Better benefits	24%	54%	39%
Fewer money problems for center	23%	na	na
Opportunities for professional growth	na	21%	19%
Respect for profession	na	21%	na

Higher earnings was listed by the largest group of directors (28%) as a motivator to stay in the field. Following this, 24% of directors stated that better benefits would keep them in the field. Fewer problems with money for the center was listed by 23% of directors as a way to keep them in the field. Of note, 38% of directors leaving the field stated that nothing would keep them in the field because they are retiring.

Though some motivators are similar for teachers, others differ. Higher pay was listed as the top motivator for keeping teachers in the field with 81% listing this option. Better benefits were listed by 54% of teachers as important to their remaining in the early care and education field. Tied for third as the top motivators for keeping teachers in the field were more respect for the profession (21%) and more opportunities for professional growth (21%).

The motivators listed most commonly by teacher assistants mirrored teacher responses with only the percentages changing. Seventy-three percent (73%) of teacher assistants listed better pay as a way to make them stay in the field. Similarly, 39% of teacher assistants listed better benefits as a motivator. Finally, 19% listed more opportunities for professional growth as a motivator to remain an early care and education professional.

## Conclusion

The past several years have shown amazing progress for the early care and education community in North Carolina. With a significant increase in education for center directors (75% with a two year degree or higher) and teachers and assistant teachers (47% with a two year degree or higher) has come a modest bump in salary, though clearly the increase continues to fall far short of public school teacher salaries. However, early care and education providers are feeling the rewards of the field and remaining in their chosen profession (17 years for directors, 10.0 years for teachers and 6.0 years for assistant teachers).

Perhaps one reason that the turnover has dropped for the early care and education providers in North Carolina is the usage of community supports. Over a third of center directors and teachers receive a salary supplement funded by Smart Start. Likewise, a quarter of teachers and assistant teachers take advantage of T.E.A.C.H. Early Childhood® scholarships. Both of these projects specifically address the issue of high turnover. Providers who take advantage of these projects have shown an increase in their commitment to remaining in their programs for a period of time.

Despite these significant gains for the workforce, some areas continue to lag behind. The lack of health insurance forecasts the potential for significant financial difficulties for many North Carolina providers and their families. (Thirty-three percent of teachers and 29% of assistant teachers have no insurance from any source.) Those providers working in single site for profit centers and non-profit programs sponsored by faith communities fair the worst in this regard with only 21% and 35% respectively providing any support for health insurance for their employees. Likewise, the increase in

teachers' use of public assistance demonstrates that, while wages have grown, the net benefits of these increases are not enough for families to be self-sufficient.

Clearly, the strategies employed by North Carolina to focus on the workforce have been successful. Providers are increasing their education and remaining in the field for longer. The decision to embed NC Pre-K in private child care settings has played a pivotal role in driving the increase in wages, benefits and education levels of early care and education providers. Ultimately, the children of North Carolina are reaping the benefits of the battles fought and won by the child care advocates and funders of the counties and the state. However, recent funding cuts to programs supporting the early care and education workforce and a gradually improving economy represent a recipe for disaster. As higher paying jobs become available in our communities, a better educated early care and education workforce may be enticed away to careers with higher pay and better benefits leaving North Carolina's youngest citizens to begin their lives at a disadvantage.

## Recommendations



1. The state of North Carolina should fully and routinely fund a similar study of the workforce for the entire state. Data gathered in 2003 is now eight years old and, as has been shown through this report, is largely outdated in some areas. Additional funds for a longitudinal study following particular programs and teachers over time can provide new insights into long term benefits for programs and funding.
2. The findings of this study should be widely distributed to the early care and education community. Presentations should encourage center directors and family child care providers to compare their policies and practices with North Carolina providers at large to help them develop strategies to improve education, salaries, benefits, working conditions and retention.
3. Over the past eight years, Smart Start, State, CCDF quality dollars investments and others have targeted and led to improvements in compensation, education and retention. These investments should be continued and expanded to further increase the quality of care provided to North Carolina's youngest citizens.
4. Increasing health insurance costs are making it very difficult for child care providers to fully cover health insurance programs. Additional supports to programs to help with health insurance for their employees could increase longevity and improve the health of both child care teachers and the children in their programs.
5. Some areas of the workforce have not improved as dramatically as other areas. Key partners should study the results of this report and develop and fund strategies and programs that directly impact these particular variables and geographies within our state.
6. Infant and/or toddler teachers tend to have less education, are paid less and have fewer years of experience both within their centers and in the field as a whole than preschool teachers. Projects aimed at improving education, compensation and retention should have specific strategies aimed at helping infant/toddler teachers.
7. Subsidy payment rates for infant and toddler care have been severely depressed. Looking at the success of the NC Pre-K program (More at Four), which has better standards and a much higher reimbursement rate, provides evidence that strategic investments in rates coupled with expectations for quality and compensation can really make a difference. A similar approach should be implemented to raise the quality of care for infants and toddlers from low income families.
8. Efforts to inform and engage the faith community can lead to increased understanding of quality and the benefits of licensure. Model, licensed faith-based programs that have 4- or 5-stars can help inform and recruit GS-110 programs to become licensed.
9. Similarly, work with for profit programs to help them with the development and implementation of salary schedules tied to education, implementation of benefits and improved working conditions and revenue generating strategies may result in a better qualified, higher compensated workforce.



## Survey Methods and Response Rates

Child care programs selected for survey participation were drawn from February 2011 regulatory data of the North Carolina Division of Child Development and Early Education. Programs that served only school-age children or that provided care only during the summer months were not included in this study. Additionally, unlicensed, public pre-k programs were not included as part of this study. The total population of programs was divided into the 14 Child Care Resource and Referral (CCR&R) Regions. Each program was then assigned a random number. Within each region the first 15% of each region's programs were selected to participate in the study. This yielded a total of 631 programs in the study. Center packets included a cover letter, questionnaire and postage-paid envelope for the director; cover letter, questionnaire and postage-paid envelope for each teacher/assistant teacher, and raffle tickets for the director and teachers.

The written questionnaires used in this survey were based on forms for child care center directors and teachers previously created and used by the authors of this study. The questionnaires were modified to include relevant and time-sensitive items.

Staff followed the initial survey mailing to each program with follow up survey mailings to non-responsive programs. To ensure a high survey response rate, repeated phone calls were made to child care centers to both remind participants to respond and to conduct surveys over the phone. When requested, mailings were emailed and/or 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 calculate the teachers' participation rate.

Throughout the study, programs were dropped from the sample for various reasons including closure (11), ineligible due to serving school-age only (3), unreachable (6), and refusal (54). Consequently, these programs were replaced by the next program in the list with slight adjustments to keep star license constant statewide. These newly added programs were mailed the same materials as the original sample.

Based on director reports the overall statewide teacher/assistant teacher count of the final sample was 4,780 with responses received from 2,535. This yielded a participation rate of 53% for teachers/assistant teachers statewide. The goal was to obtain a 50% participation rate for teachers in each region, to ensure strong representation of each region's child care workforce as a whole. This goal was achieved as individual region response rates ranged from a high of 62% in Region 9 to a low of 50% in Region 6.

As part of the data analysis process, cases were weighted up to population estimates. Weighting schemes incorporated variables that affected probabilities of selection of a case as well as other variables which were statistically tested and found to be statistically significantly associated with the actual probability of survey response. For the director survey, weights were constructed based on the star rating category so that typically each sample respondent was weighted up to reflect about seven cases. For individual teaching staff, weights incorporated the CCR&R Region in which their program was located, and each case in the sample typically represents about 12 cases. Responses were tested for bias due to program size and sponsorship but none were found. Percentages, means, and medians in the report are based on the weighted data, which in most cases differ slightly from the comparable measures using unweighted data. Further details are available upon request.

In various places within the report, organizational categories were collapsed for simplification. For-profit centers included programs 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. Non-profit centers included programs with a Letter of Compliance (GS-110) as well as centers with a star-rated license. These programs include both faith-based centers and those that are community or board sponsored. Public sponsored programs include Head Start sites, public school sponsored and other publicly funded programs. NC Pre-K programs (formerly More at Four) are represented in all three organizational structures. Public pre-k programs that are not licensed were not included as part of this study.

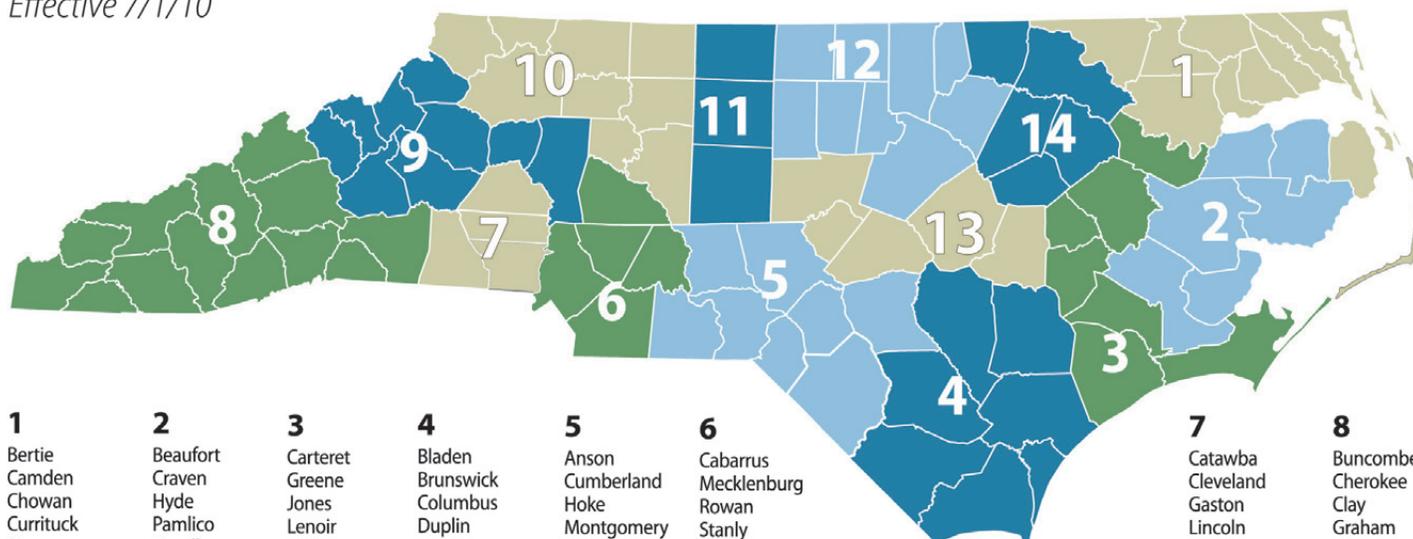
The 14 Child Care Resource and Referral regions can be seen in the picture that follows.



Photo: Senator Kate Lundy

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

Effective 7/1/10



**1**  
Bertie  
Camden  
Chowan  
Currituck  
Dare  
Gates  
Hertford  
Northampton  
Pasquotank  
Perquimans

**2**  
Beaufort  
Craven  
Hyde  
Pamlico  
Tyrrell  
Washington

**3**  
Carteret  
Greene  
Jones  
Lenoir  
Martin  
Onslow  
Pitt

**4**  
Bladen  
Brunswick  
Columbus  
Duplin  
New Hanover  
Pender  
Sampson

**5**  
Anson  
Cumberland  
Hoke  
Montgomery  
Moore  
Richmond  
Robeson  
Scotland

**6**  
Cabarrus  
Mecklenburg  
Rowan  
Stanly  
Union

**7**  
Catawba  
Cleveland  
Gaston  
Lincoln

**8**  
Buncombe  
Cherokee  
Clay  
Graham  
Haywood  
Henderson  
Jackson  
Macon  
Madison  
Polk  
Rutherford  
Swain  
Transylvania

**9**  
Alexander  
Avery  
Burke  
Caldwell  
Iredell  
McDowell  
Mitchell  
Watauga  
Yancey

**10**  
Alleghany  
Ashe  
Davidson  
Davie  
Forsyth  
Stokes  
Surry  
Wilkes  
Yadkin

**11**  
Guilford  
Randolph  
Rockingham

**12**  
Alamance  
Caswell  
Durham  
Franklin  
Granville  
Orange  
Person  
Vance  
Wake

**13**  
Chatham  
Harnett  
Johnston  
Lee  
Wayne

**14**  
Edgecombe  
Halifax  
Nash  
Warren  
Wilson

## 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 Cc)
- 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)

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For more information about the 2011 Statewide Workforce Survey, please contact the Research Department at Child Care Services Association, (919) 967-3272 or [research@childcareservices.org](mailto:research@childcareservices.org).

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