



Working in Early Care and Education in North Carolina

2019 Workforce Study



Purpose

- Describe the current (pre-COVID) early care and education workforce (birth to five) and programs including both centers and homes
- Measure changes over time
- Inform efforts to support and grow the child care workforce



Methodology

- Population: February 2019-DCDEE licensing files minus school age only programs
- Centers
 - Divided into counties
 - Larger counties sampled based on star levels, size and auspice
 - Smaller counties used entire population
- Homes
 - Divided into 3 geographic areas
 - Sampled based on star levels

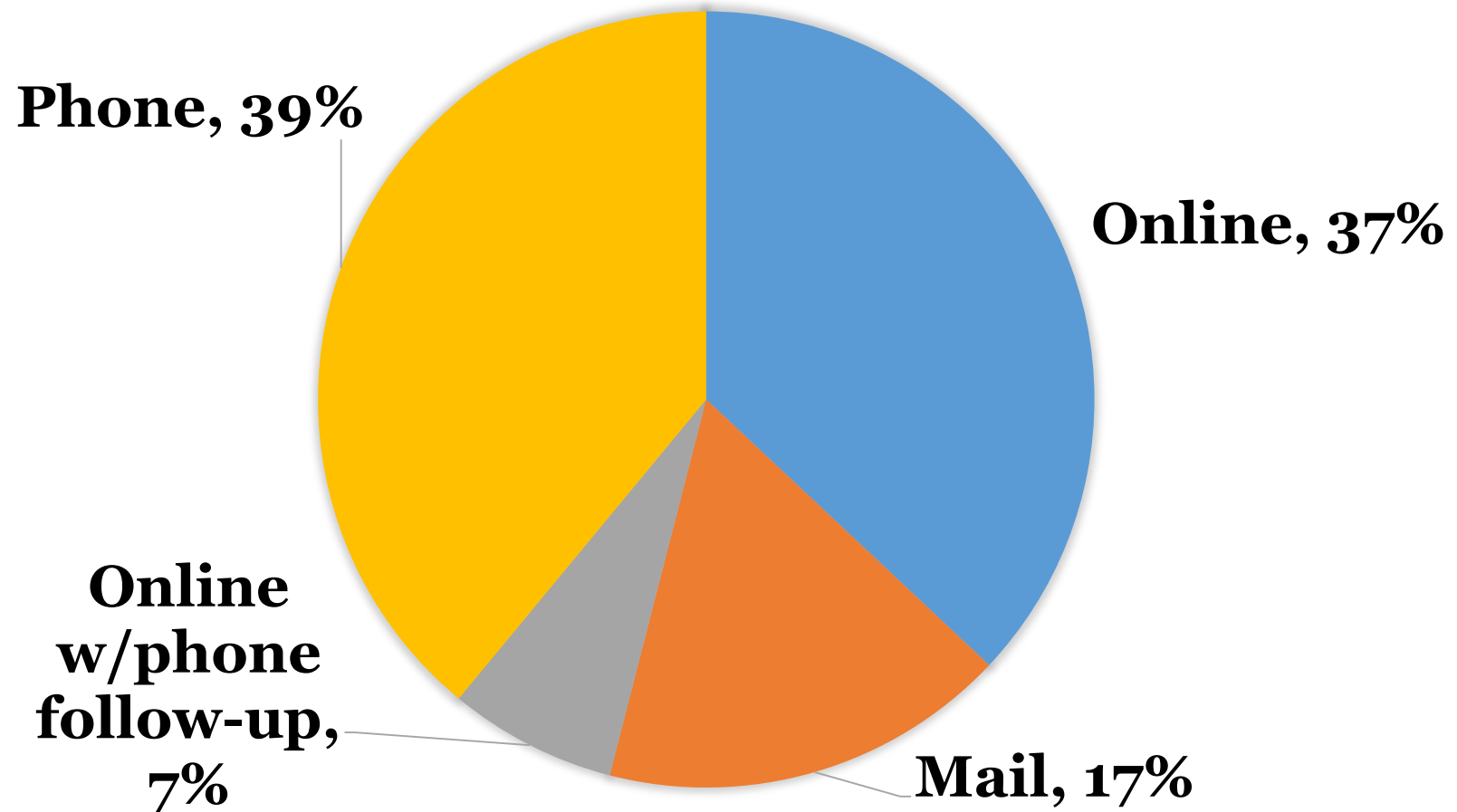


Methodology

- Directors, Teachers/Assistants & Family Child Care Providers
- Surveys based on forms previously used for workforce studies
- Questions included working conditions, demographics, education, experience and wages
- Teachers/Assistants matched to program data-when possible
- Multiple methods of gathering surveys
- Responses weighted to ensure representation



Director Surveys



Response Rates



- 74% response rate from center directors
- 40% participation rate from teachers/assistant teachers
- 71% response rate from family child care providers

Results



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Child Care Centers at a Glance

- Over 3,900 centers provide care for nearly 177,000 birth to five year olds
- 40 birth to five year old children
- 8 full/part time teachers and assistants
- 35% have no assistant director
- 57% have no educational support staff
- 64% participate in CACFP
- 81% have at least one child receiving subsidized care



Child Care Homes at a Glance

- Over 1,500 homes provide care for nearly 6,300 children (0-5)
- 63% accept children who receive subsidy
- 76% participate in CACFP
- Types of care provided
 - 56% evening
 - 30% overnight
 - 24% weekend
 - 14% sick child
 - 27% legal holidays
 - 71% drop-in care



Child Care Programs at a Glance

- Star Level
 - 70% of centers 4- or 5-star (73% enrollment)
 - 50% of homes are 4- or 5-star (51% enrollment)
- Auspice
 - 55% - for-profit centers (59% enrollment)
 - 20% - non-profit centers (23% enrollment)
 - 25% - public centers (18% enrollment)
 - All homes are for-profit
- 31% of centers have at least one NC Pre-K classroom



Profile of the Workforce

	Director		Teaching Staff		FCC	
	2015	2019	2015	2019	2014	2019
Median age	47 yo	48 yo	38 yo	40 yo	51 yo	55 yo
Female	95%	95%	99%	99%	99%	99%
People of color	44%	45%	47%	51%	67%	73%
Have children, any age	88%	89%	74%	77%	88%	90%
Have at least one child 0-18	48%	45%	48%	47%	39%	29%
Single parent sole responsibility for child	9%	6%	14%	14%	11%	8%
Annual family income <\$30K	14%	7%	56%	49%	43%	30%
Annual family income <\$50K	41%	32%	78%	75%	74%	68%



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Education of the Child Care Workforce

	Directors		Teachers		Assistant Teachers		FCC Providers	
	2015	2019	2015	2019	2015	2019	2014	2019
Bachelor's Degree/More in ECE/CD	23%	25%	15%	16%	3%	4%	5%	8%
Bachelor's Degree/More in Other	37%	39%	22%	18%	12%	14%	15%	9%
Associate Degree in ECE/CD	18%	19%	21%	26%	24%	24%	20%	29%
Associate Degree in Other	3%	4%	5%	5%	7%	8%	9%	5%
High School + Any College Courses	19%	13%	36%	32%	44%	40%	45%	44%
High School or Less + No College	1%	1%	2%	2%	9%	10%	6%	6%
Currently Taking ECE/CD Courses	14%	9%	17%	16%	19%	20%	12%	8%



ECE Degree

	2015*	2019
Directors	47%	50%
Teachers	38%	44%
Assistant Teachers	28%	29%
Family Child Care Providers	27%	38%



* FCC data from 2014

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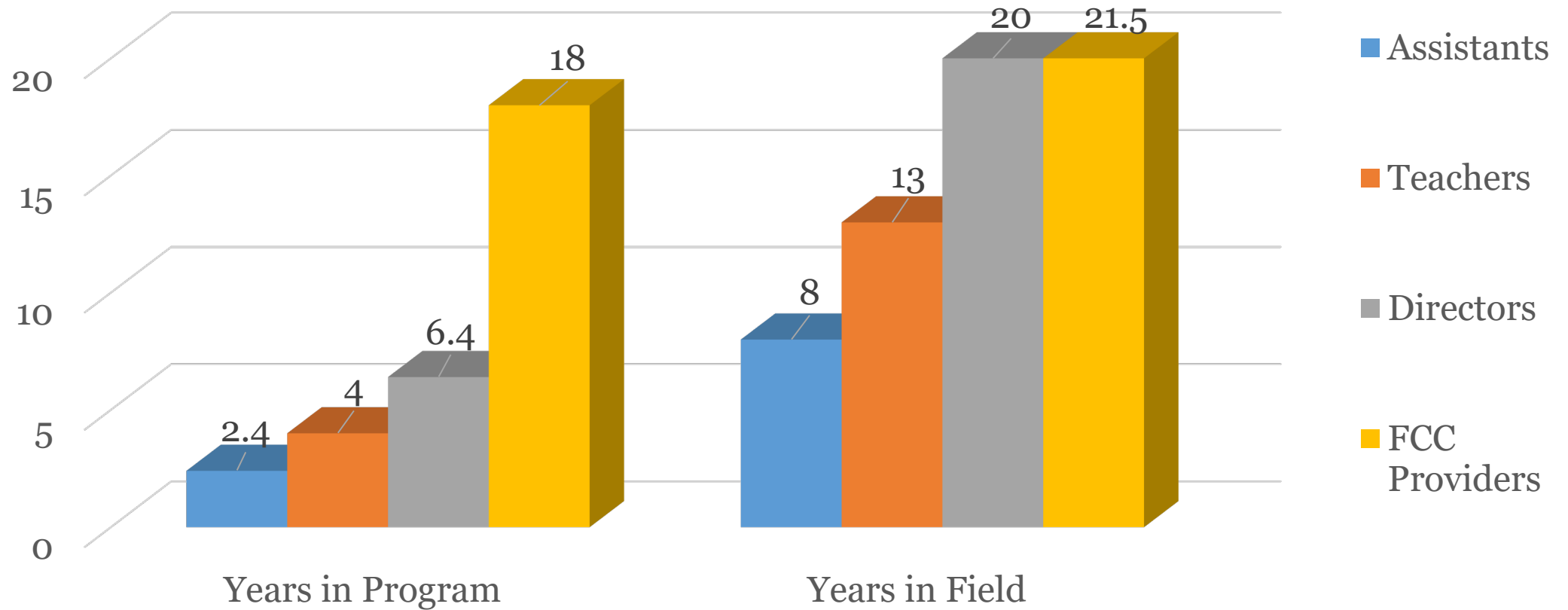
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Education by Age Group Taught

Infant/Toddler Teaching Staff		Preschool Teaching Staff
53%	Have at least an associate degree	69%
33%	Have an ECE degree	44%
24%	Have the infant/toddler certificate	15%
5%	Working on the infant/toddler certificate	2%



Workforce Experience



Workforce Turnover

	2015	2019
Full-time Teachers and Assistant Teachers	18%	21%
Full-time Teachers	19%	22%
Full-time Assistant Teachers	13%	18%
Teachers Leaving the Field in 3 years	19%	19%
Assistant Teachers Leaving the Field in 3 years	21%	22%
Directors Leaving the Field in 3 Years	12%	8%
Family Child Care Providers Leaving the Field in 3 Years	17%	14%



Experience by Age Group Taught

3.1	Years in Program	4.0
10.2	Years in Field	13.0
20%	Less than 1 Year in Program	16%



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Center Wage Scales

	2019 Median Wage	2015 Wage in 2015 Dollars	2015 Wage in 2019 Dollars	Percent Change 2015-2019
Starting Teacher Wage	\$10.50	\$10.00	\$10.73	-2.1%
Highest Teacher Wage	\$15.00	\$12.50	\$13.42	11.8%
Starting Assistant Teacher Wage	\$10.00	\$9.00	\$9.66	3.5%
Highest Assistant Teacher Wage	\$12.00	\$10.00	\$10.73	11.8%



Self-Reported Earnings of the Workforce

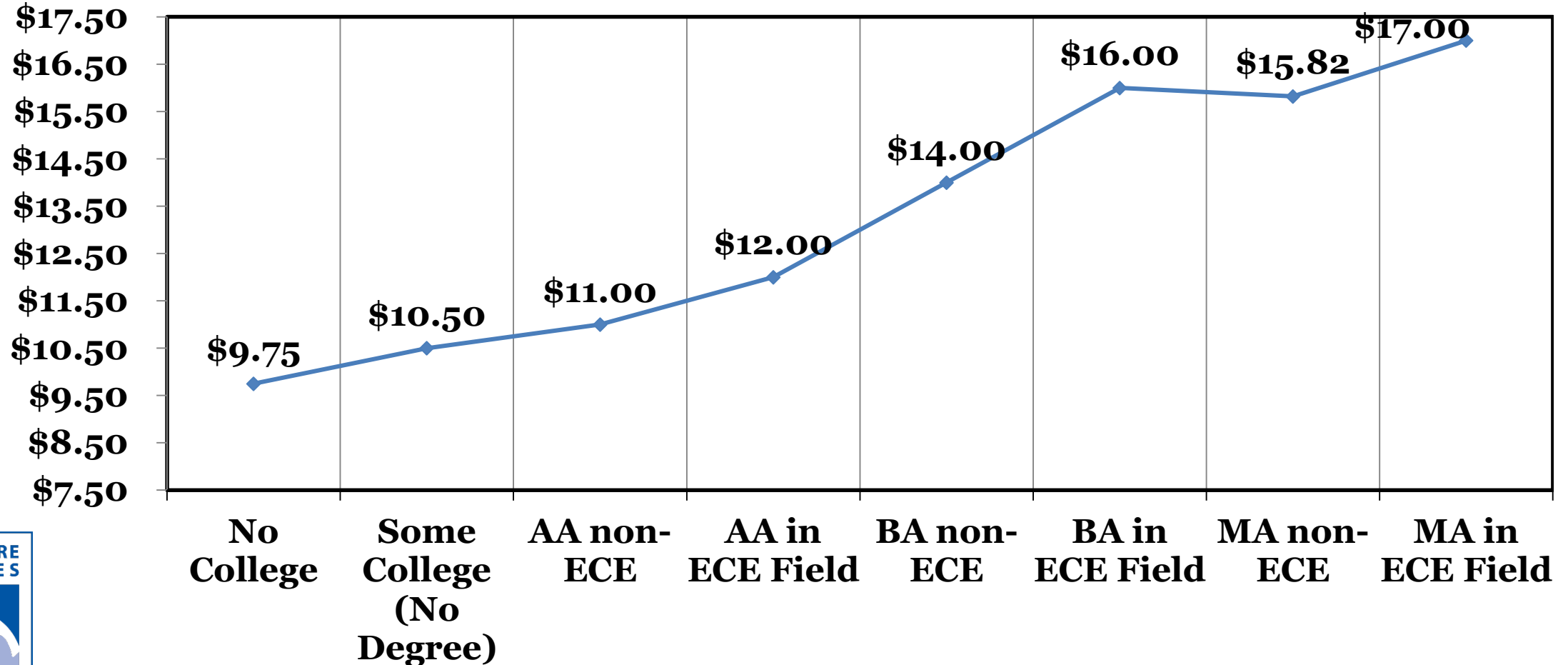


	2019 Wage	2015* Wage in 2019 dollars	Percent Change 2015*- 2019
Teacher	\$12.04	\$11.77	2.3%
Teacher Assistant	\$11.00	\$10.70	2.8%
Director	\$19.23	\$17.17	12.0%
FCC Provider	\$9.09	\$7.58	19.9%

*FCC prior figures from 2014



Median Wage of Teachers (only) by Level of Education



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Self-Reported Earnings by Age Group Taught



\$11.50 per hour



\$13.00 per hour



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Employment Benefits in Centers

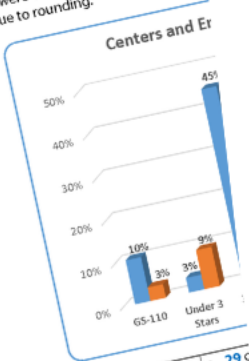
	2015	2019
Fully Paid Health Insurance	19%	15%
Partially Paid Health Insurance	30%	33%
Free Child Care	13%	10%
Disability Insurance	33%	32%
Parental Leave	56%	64%
Reduced Child Care Fee	52%	57%
Retirement Benefits	39%	43%
Paid Sick Leave	72%	71%
Paid Vacation	83%	87%
Paid Holidays	90%	93%





The 2019 Early Care and Education Workforce in Jackson County

As part of the statewide 2019 North Carolina Division of Child Development and Early Education survey, data were collected from Jackson County. Additional findings from family child care programs, and assistant teachers who participated from all of the licensed centers serving children from birth to five years of age were also presented. Surveys were returned from a total of 83% of directors (n=24) and 35% of teachers (n=43) in those programs. (A total of 21 surveys were returned from the teaching staff.) Detailed information about survey methods and definitions of key terms can be found in the appendix to this study were collected prior to the onset of the COVID-19 pandemic. Totals may not equal one hundred percent due to rounding.



Programs

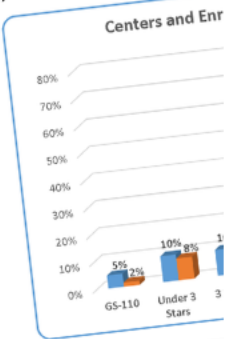
- 29 centers to five years of age
- On average, 10% of centers are 5 Stars
- Starting salary of \$15.00 per hour
- Starting assistant teachers made an average of \$10.00 per hour with a highest average salary of \$15.00 per hour.
- 63% of centers provided fully or partially paid health insurance.
- Percentage of centers that provided paid time off: 88% sick leave, 75% vacation leave, 88% holiday leave
- 25% of centers provided disability, 75% provided parental leave, and 63% provided retirement.

*All enrollment data and center star level from DCEE licensing data, February 2019. Auspic data from director surveys.



The 2019 Early Care and Education Workforce in McDowell County

As part of the statewide 2019 North Carolina Division of Child Development and Early Education survey, data were collected from McDowell County. Additional findings from family child care programs, and assistant teachers who participated from all of the licensed centers serving children from birth to five years of age were also presented. Surveys were returned from a total of 71% of directors (n=10) and 35% of teachers (n=34) in those programs. (A total of 34 surveys were returned from the teaching staff.) Detailed information about survey methods and definitions of key terms can be found in the appendix to this study were collected prior to the onset of the COVID-19 pandemic. Totals may not equal one hundred percent due to rounding.



Programs

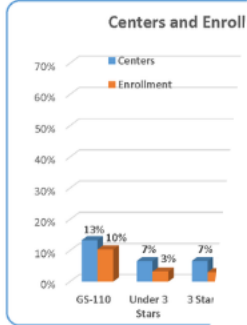
- 21 centers to five years of age
- On average, 10% of centers are 5 Stars
- Starting salary of \$15.00 per hour
- Starting assistant teachers made an average of \$10.00 per hour with a highest average salary of \$15.00 per hour.
- 63% of centers provided fully or partially paid health insurance.
- Percentage of centers that provided paid time off: 88% sick leave, 75% vacation leave, 88% holiday leave
- 25% of centers provided disability, 75% provided parental leave, and 63% provided retirement.

*All enrollment data and center star level from DCEE licensing data, February 2019. Auspic data from director surveys.



The 2019 Early Care and Education Workforce in Jackson County

As part of the statewide 2019 North Carolina Division of Child Development and Early Education survey, data were collected from Jackson County. Additional findings from family child care programs, and assistant teachers who participated from all of the licensed centers serving children from birth to five years of age were also presented. Surveys were returned from a total of 80% of directors (n=13) and 35% of teachers (n=45) in those programs. (A total of 45 surveys were returned from the teaching staff.) Detailed information about survey methods and definitions of key terms can be found in the appendix to this study were collected prior to the onset of the COVID-19 pandemic. Totals may not equal one hundred percent due to rounding.



Programs

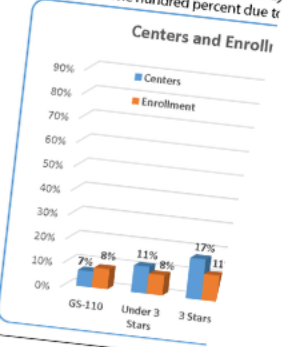
- 15 centers to five years of age
- On average, 10% of centers are 5 Stars
- Starting salary of \$15.00 per hour
- Starting assistant teachers made an average of \$10.00 per hour with a highest average salary of \$15.00 per hour.
- 63% of centers provided fully or partially paid health insurance.
- Percentage of centers that provided paid time off: 88% sick leave, 75% vacation leave, 88% holiday leave
- 25% of centers provided disability, 75% provided parental leave, and 63% provided retirement.

*All enrollment data and center star level from DCEE licensing data, February 2019. Auspic data from director surveys.



The 2019 Early Care and Education Workforce in Jackson County

As part of the statewide 2019 North Carolina Division of Child Development and Early Education survey, data were collected from Jackson County. Additional findings from family child care programs, and assistant teachers who participated from all of the licensed centers serving children from birth to five years of age were also presented. Surveys were returned from a total of 69% of directors (n=21) and 35% of teachers (n=69) in those programs. (A total of 398 surveys were returned from the teaching staff.) Detailed information about survey methods and definitions of key terms can be found in the appendix to this study were collected prior to the onset of the COVID-19 pandemic. Totals may not equal one hundred percent due to rounding.



Programs

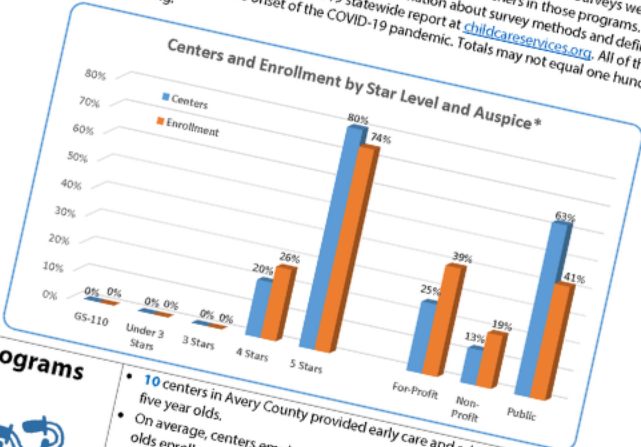
- 332 centers to five years of age
- On average, 10% of centers are 5 Stars
- Starting salary of \$15.00 per hour
- Starting assistant teachers made an average of \$10.00 per hour with a highest average salary of \$15.00 per hour.
- 63% of centers provided fully or partially paid health insurance.
- Percentage of centers that provided paid time off: 88% sick leave, 75% vacation leave, 88% holiday leave
- 25% of centers provided disability, 75% provided parental leave, and 63% provided retirement.

*All enrollment data and center star level from DCEE licensing data, February 2019. Auspic data from director surveys.



The 2019 Early Care and Education Workforce in Avery County

As part of the statewide 2019 North Carolina Division of Child Development and Early Education survey, data were collected from Avery County. Additional findings from family child care programs, and assistant teachers who participated from all of the licensed centers serving children from birth to five years of age were also presented. Surveys were returned from a total of 80% of directors (n=8) and 63% of teachers (n=21) in those programs. (A total of 21 surveys were returned from the teaching staff.) Detailed information about survey methods and definitions of key terms can be found in the appendix to this study were collected prior to the onset of the COVID-19 pandemic. Totals may not equal one hundred percent due to rounding.



Programs

- 10 centers in Avery County provided early care and education to 239 birth to five year olds.
- On average, centers employed 2 teaching staff and had 17 birth to five year olds enrolled.
- Starting salary of \$15.00 per hour
- Starting assistant teachers made an average of \$10.00 per hour with a highest average salary of \$15.00 per hour.
- 63% of centers provided fully or partially paid health insurance.
- Percentage of centers that provided paid time off: 88% sick leave, 75% vacation leave, 88% holiday leave
- 25% of centers provided disability, 75% provided parental leave, and 63% provided retirement.

*All enrollment data and center star level from DCEE licensing data, February 2019. Auspic data from director surveys.



County Variations

	Directors	Teaching Staff
At least an AA Degree	40% - 100%	29% - 100%
ECE Degree	0% - 100%	0% - 100%
Years in Program	0.8 - 16.6 years	0.9 - 22.0 years
Years in Field	11.5 - 32.5 years	3.0 - 38.3 years
Hourly Salary	\$10.00 - \$33.17	\$8.00 - \$21.06



Statewide/county reports: www.childcareservices.org
Questions/data requests: marym@childcareservices.org



Questions?



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