

**EMBARGOED UNTIL  
December 6, 2004 9:00am**

# **Working in Child Care in North Carolina**

The North Carolina Child Care  
Workforce Survey 2003

**NC Early Childhood Needs and Resources Assessment**

Child Care Services Association  
FPG Child Development Institute

## **Acknowledgements**

The authors thank:

The N.C. Division of Child Development and More at Four for providing the funding for this project.

The FPG Child Development Institute for inviting Child Care Services Association to collaborate with them on the 2003 Early Childhood Needs and Resources Assessment, of which this study is a part.

The Smart Start partnerships and child care resource and referral agencies for helping us obtain high participation rates in their communities.

The child care providers who participated in the survey and who have dedicated themselves to providing quality care for young children across the state.

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

For more information about the North Carolina Needs and Resources Assessment, please visit the project web site at [www.fpg.unc.edu/~ncnr\\_assessment](http://www.fpg.unc.edu/~ncnr_assessment).

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## Introduction

As part of the North Carolina Needs and Resources Assessment, a statewide survey of the child care workforce was conducted in the spring and summer of 2003. The workforce study provides comprehensive data on child care providers and on the facilities in which they work. This report includes a summary of the workforce survey results in North Carolina and a comparison of 2003 data to similar data collected in 2001. Survey response rates were 78% of center directors (n = 2,203 director surveys collected), 52% of teachers (n = 13,120 teacher surveys collected) and 78% of family child care providers (n = 2,337 family child care provider surveys collected). Detailed information about survey methods and response rates can be found in Appendix A.

## Summary of Key Findings

North Carolina's child care workforce has experienced change in a number of areas since the last workforce survey two years ago. Listed below are some of these changes as well as other key findings from the current study. More detailed descriptions of these data are included throughout the report.

- Though they equal 19% of the children enrolled in licensed child care centers, infants and one year olds represent 44% of the children on waiting lists to enroll.
- The percentage of teachers and assistants with a two-year degree or more in any field increased from 22% in 2001 to 28% in 2003.
- Twenty-five percent of teachers and assistants in rural counties and 29% in urban counties have a two-year degree or more in any field.
- Fifty-two percent of non-profit centers (not including faith-based programs) had a 4- or 5-star rating as compared to 18% of faith-based non-profit centers and 23% of for-profit centers.
- Compared to 33% of family child care providers statewide, 54% of family child care providers running 4- or 5-star licensed homes completed at least one college course in the past 12 months. Furthermore, 35% of providers running 4- or 5-star licensed homes and 20% of providers statewide had a college degree in any field.
- Net earnings in family child care homes were \$5.71 per hour, up slightly from net earnings of \$5.57 in 2001. Earnings decreased slightly when adjusting 2001 wages for inflation (\$5.79 per hour).
- Median wages paid to child care teachers and assistants increased from \$7.50 per hour in 2001 to \$8.00 per hour in 2003. When adjusting 2001 wages for inflation, the difference between wages then and now is \$.21 per hour.
- The proportion of teachers and assistants with health insurance has decreased over time (73% in 2001 and 71% in 2003), and so has the proportion of centers providing fully paid health insurance to staff (16% in 2001 and 14% in 2003).

- Sixty percent of child care centers offer paid sick leave to staff. This was a small improvement from two years ago (58%).
- Centers with 4- or 5-star licenses are much more likely than child care centers with lower star ratings to provide fully paid health insurance and paid sick leave to staff.
- Turnover of full-time teachers and assistants statewide decreased from 31% in 2001 to 24% in 2003. Centers with 4- or 5-star licenses have a turnover rate of 17%, whereas turnover in all other centers is 28%.

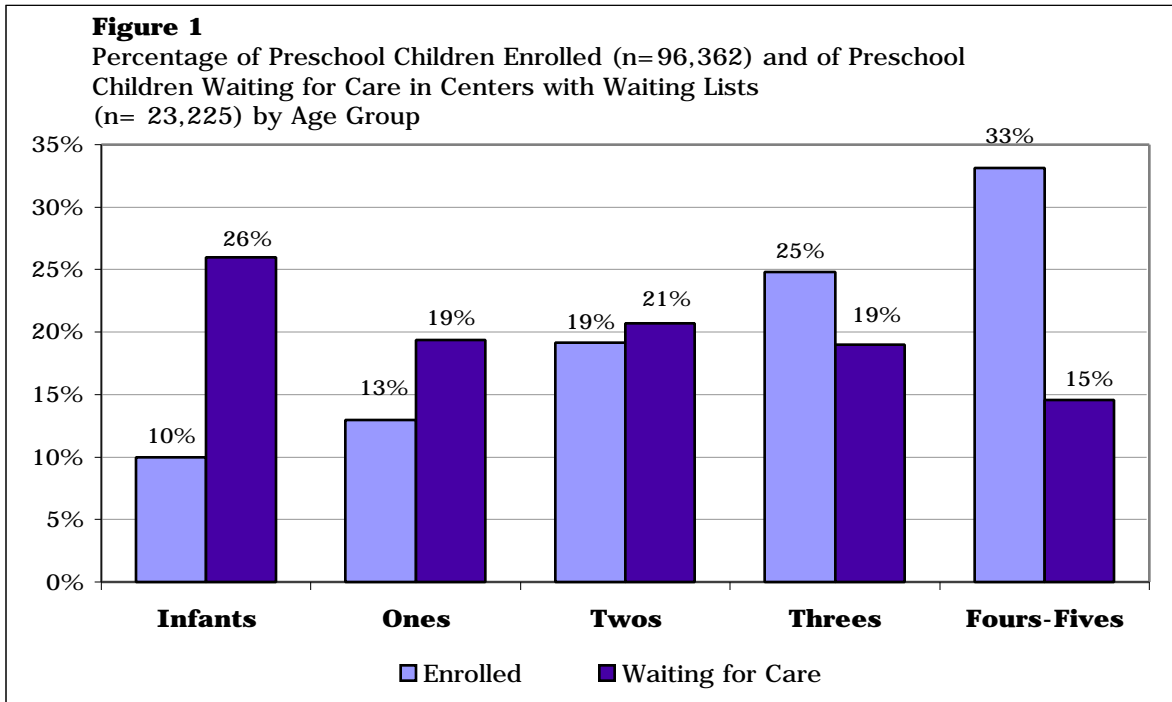
## Child Care Centers

The percentages of responding directors by child care center organizational structure and star rating are shown in Table 1. 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. Faith-based, non-profit centers included programs with a Letter of Compliance (GS-110) as well as centers with a star-rated license. Other non-profit centers included non-profit independent centers that were community or board sponsored, non-profit public-school programs and Head Start sites. Programs that could not be easily classified into one of these three groups were combined into a separate group (other). Fifty-two percent of non-profit centers (not including faith-based programs) had a 4- or 5-star rating as compared to 19% of faith-based non-profit centers and 24% of for-profit centers (see Appendix B).

Center License	Organizational Structure				Overall**
	For-profit Centers	Faith-based Non-profit Centers	Other Non-profit Centers	Other	
4 or 5 Stars	15%	3%	11%	0%	<b>30%</b>
3 Stars	28%	4%	5%	0%	<b>38%</b>
Under 3 Stars*	18%	9%	6%	1%	<b>32%</b>
Overall	<b>61%</b>	<b>16%</b>	<b>22%</b>	<b>1%</b>	

\* Includes 1- and 2-star licensed centers, GS-110 (Letter of Compliance) centers and centers with a temporary or provisional license.  
 \*\*According to the NC Division of Child Development (DCD), 28% of all licensed centers had 4 or 5 stars, 35% had 3 stars and 37% had under 3 stars in January 2003.

Centers enrolled a median of 36 children ages birth to five (not including school-agers) and employed a median of 5 full-time and 1 part-time teachers and assistants. Forty-four percent of the centers had children on their waiting list with a median of 10 children waiting at each center. Fifty-five percent of centers with a 4- or 5-star license had children on their waiting list with a median of 15 children waiting at each center. Infants and one year olds represented 23% of all the children enrolled in licensed child care centers but were 45% of the children on waiting lists to enroll in centers statewide (See Figure 1).



**Selected Funding Sources.** Child care centers rely on a combination of multiple funding sources to cover their operating expenses, primarily including fees paid by parents, child care subsidy payments and food reimbursements through the Child and Adult Care Food Program. Weekly child care fees charged by centers ranged from a median of \$130 for infant care to a median of \$110 for three-year-olds. Eighty percent of all centers reported enrolling children with child care subsidy in January 2003. Sixty-eight percent of the centers were participating in the Child and Adult Care Food Program to help defray the cost of serving nutritious meals to the children. Sixty-five percent of non-profit centers (including faith-based centers and all other non-profits) and 71% of for-profit centers were participating in the Food Program.

**Staffing.** Child care center staff represented a wide variety of positions in the early childhood field and worked with children of all ages. Those who completed a director survey held titles such as director (67%), director/owner (29%) and other positions (4%). The responding teachers held titles of, lead teacher (44%); teacher (29%); assistant teacher, teacher's aide or floater<sup>1</sup>; (21%) and other positions (6%). Most teachers worked only with children ages birth to five (93%), whereas 4% worked with school-agers only and 3% worked with all ages.

**Employment Benefits.** Employment benefits offered by centers in North Carolina are shown in Table 2. Fourteen percent of directors said that their centers provided fully-paid health insurance coverage. Though teachers work with very young children who are frequently ill, 40% of centers do not offer a single day of paid sick leave. Among teaching staff that had ever worked over 40 hours per week (44%), almost half (47%) said that their centers paid them time and a half for the overtime hours that they worked. Federal wage and hour law requires that non-exempt workers such as child care providers receive time and a half for all overtime hours.

<sup>1</sup> A floater is typically a teacher that works in multiple classrooms based on need.  
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 North Carolina Early Childhood Needs and Resources Assessment

**Table 2**  
Employment Benefits in Child Care Centers

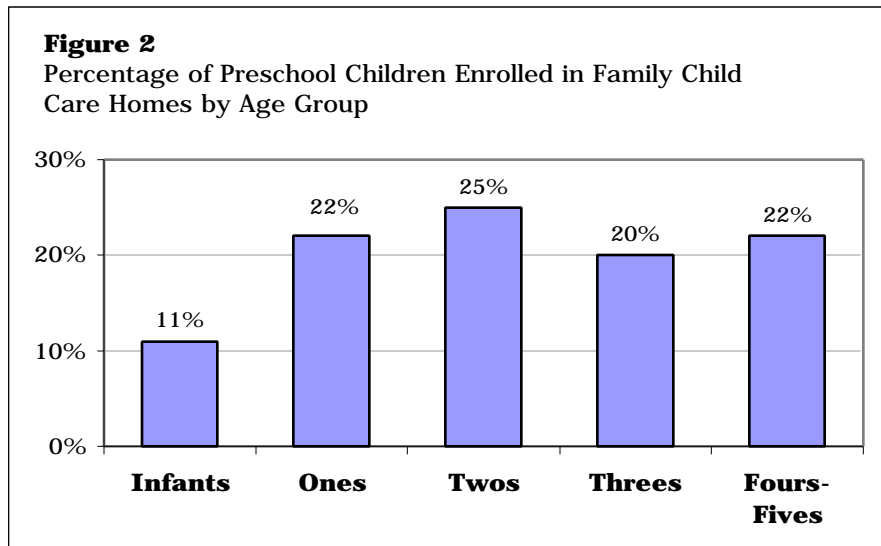
	<b>2001</b>	<b>2003</b>
Fully Paid Health Insurance	16%	14%
Partially Paid Health Insurance	32%	33%
Free Child Care	12%	8%
Reduced Child Care Fee	47%	47%
Parental Leave	40%	38%
Paid Sick Leave	58%	60%
Paid Vacation	85%	88%
Paid Holidays	92%	91%
Paid Retirement Benefits	27%	27%

### Family Child Care Homes

The family child care providers who responded to the survey had been in business for a median of 5.4 years. Providers worked 53 hours per week on average. Fourteen percent reported having help from a paid assistant; another 29% received assistance from a family member. Among the special services offered by the family child care providers were evening care (53%), overnight care (27%), drop-in care (53%), holiday care (25%) and care for sick children (3% care for sick children routinely and 41% do so “sometimes”). Nearly all homes (91%) required parents to sign a written agreement before enrolling their children. Others (44%) offered fee discounts to families that enrolled more than one child; 7% offered scholarships or sliding fee scales.

Twenty-one percent of the family child care homes had a 4- or 5-star license, 24% had a 3-star license and 55% had a license under 3 stars (1 or 2 stars). Fifty-two percent of the homes had a 1-star license, an indicator that many homes had not completed the assessment required to seek a higher license. According to DCD records for January 2003, 18% of all licensed family child care homes in North Carolina had 4 or 5 stars, 23% had 3 stars and 59% had under 3 stars (1 or 2 stars).

Family child care home enrollment as of January 2003 ranged from 1 to 13 children ages birth to five with a median of 5 young children in each home. Figure 2 shows the percentage of children enrolled by age group. Three percent of the enrolled children ages birth to five were providers’ own children. This percentage varies slightly by age group, in that the percentage rises from 2% of infants and ones to 5% of fours and fives.



Child care enrollment fees varied by age group. The median weekly fee for full-time infant care was \$100, whereas the median full-time fee for three-year-olds was \$90 per week. Median fees for family child care homes were lower than centers' fees in every age group.

**Earnings and Expenditures.** Family child care providers' median gross monthly earnings (based on child care fees, subsidy payments and Food Program reimbursements) for January 2003 were \$1,949, and monthly median expenditures were \$545. Based on these data, estimated net yearly earnings were \$16,725. Sixty-five percent of homes enrolled children who received child care subsidy, and 47% of all the children in family child care were subsidy recipients. Food costs represented about 54% of providers' monthly expenditures, and 78% of North Carolina providers defrayed this expense by participating in the Child and Adult Care Food Program. The median reimbursement that providers said they received for January 2003 was \$255, and reimbursements covered 83% of providers' monthly food costs. Median hourly earnings were \$5.71, estimated by dividing net monthly earnings by the number of hours each home was open. This estimate does not include home occupancy costs such as utilities, home improvement or repairs, cleaning, rent or mortgage.

Table 3 shows the change over time of providers' operating expenses and earnings. The data have not changed significantly since 2001. When adjusted for inflation<sup>2</sup>, median monthly and hourly earnings showed a slight decline over this two-year period. To keep up with inflation, providers needed to earn \$5.79 per hour in 2003.

<sup>2</sup> Earnings, expenditures and wage information from the 2001 child care workforce survey was adjusted to 2003-equivalent dollars using an inflation calculator created by the Bureau of Labor Statistics, U.S. Department of Labor (<http://www.bls.gov/cpi/>).

**Table 3****Earnings and Expenditures of Family Child Care Homes**

	<b>2001</b>	<b>2003</b>
Total Monthly Earnings (median)	\$1,940	\$1,949
Total Monthly Expenditures (median)	\$553	\$545
Net Monthly Income (median)	\$1,331	\$1,394
Hours Worked per Week (median)	53	53
Net Hourly Income	\$5.57	\$5.71

Family child care provider earnings varied by the level of their homes' star-rated license. The median hourly earnings of providers with 4- and 5-star licensed homes were \$6.53, providers with 3-star licensed homes earned \$6.09 per hour and providers with homes licensed under 3 stars earned \$5.32 per hour. Thus, providers operating 4- and 5-star licensed homes earned 22%, or \$3,200 per year, more than their colleagues operating homes with less than 3 stars.

**Benefits.** Family child care providers usually work alone or with the help of an unpaid or underpaid family member. Their child care homes are much less likely than child care centers to have an established policy regarding paid benefits. Child care tuition covered providers' vacation time in 43% of homes, and 51% of providers charged for days when they were sick. These measures help identify the degree to which providers run their child care programs as businesses designed to meet the providers' personal and professional needs. Twenty-five percent of providers said that they worked when sick, and 14% said that they never take vacations.

### **Demographic Profile of Child Care Providers**

The child care workforce in North Carolina is overwhelmingly female and includes a large proportion of workers who have children of their own (see Table 4). Among the 29% of teaching staff who indicated that their children were enrolled in the centers where they work, 77% received free or reduced-price child care from the center.

**Table 4**  
Demographic Profile of the Child Care Workforce

	<b>Center Directors</b>		<b>Teachers and Assistants</b>		<b>Family Providers</b>	
	<b>2001 n=2,220</b>	<b>2003 n=2,203</b>	<b>2001 n=13,599</b>	<b>2003 n=13,120</b>	<b>2001 n=2,091</b>	<b>2003 n=2,337</b>
Median Age	43	43	32	33	42	44
Female	97%	97%	99%	99%	99%	99.5%
People of Color	40%	38%	47%	49%	61%	62%
Have Children	87%	89%	71%	73%	95%	94%
At Least One Child 0-18 Years Old	71%	53%	53%	54%	58%	56%
Single Parent (Children under 18 Years Old)	15%	10%	27%	28%	20%	13%
Annual Family Income Below \$30,000	25%	23%	62%	63%	46%	45%

Many people working in the early childhood field face severe economic challenges affecting themselves and their families. For example, 29% of the teachers and assistants and 30% of the family child care providers had no health insurance coverage from any source. Additionally, 36% of teachers and assistants and 26% of family child care providers had received some type of public assistance (e.g., Medicaid, Food Stamps, TANF, child care subsidy) in the last three years.

### Education of the Child Care Workforce

Child care provider education is a critical factor influencing children's early learning opportunities. This section profiles North Carolina providers' educational attainment and aspirations as expressed in the current survey and over time. See Tables 5 and 6 for education data on center directors (directors, director/owners and assistant directors), family child care providers, teachers (teachers and lead teachers) and assistant teachers (assistant teachers, teacher aides and floaters). Center directors have completed higher levels of education than teachers and family child care providers, though no group matched the minimum education requirements for teachers and administrators in public elementary, middle and high schools.

**Table 5**

## Education of Center Directors and Family Child Care Providers

	<b>Center Directors</b>		<b>Family Providers</b>	
	<b>2001</b>	<b>2003</b>	<b>2001</b>	<b>2003</b>
<b>Highest Education Completed</b>				
Bachelor Degree or More in ECE/CD*	7%	10%	1%	1%
Bachelor Degree or More in Other Field	25%	22%	9%	7%
Associate Degree in ECE/CD*	9%	13%	4%	6%
Associate Degree in Other Field	6%	5%	6%	6%
High School + Any College Courses	49%	46%	53%	55%
High School + Workshops	1%	1%	14%	16%
High School Only	1%	3%	8%	5%
Less than High School	1%	0%	5%	4%
<b>Other Education Credentials</b>				
N.C. EC Credential	64%	62%	44%	50%
N.C. EC Administration Credential	70%	78%	12%	18%
B-K/Preschool add-on Teacher Licensure	no data	3%	no data	0%
Child Development Associate (CDA)	5%	9%	4%	5%
<b>Educational Pursuits</b>				
Currently Taking ECE/CD Courses	34%	31%	24%	24%
Interested in Taking Courses**	30%	32%	40%	45%

\* ECE/CD = Early childhood education/child development. Data from 2001 have been revised for better comparison to the current data. Only those respondents who specifically mentioned "early childhood education" or "child development" as their degree field are included in the 2001 data reported in this table.

\*\* Percentages were drawn from the survey respondents who were not currently taking courses.

North Carolina child care providers have a strong interest in working toward higher levels of education. As shown in the tables, many directors, teachers and family child care providers had completed college courses. Of the survey respondents who were not taking courses, 32% of the directors, 49% of the teachers and assistant teachers and 45% of the family child care providers said they were interested in doing so.

**Table 6**

## Education of Teachers and Assistant Teachers

	<b>Teachers and Assistants</b>		<b>Teachers</b>		<b>Assistant Teachers</b>	
	<b>2001</b>	<b>2003</b>	<b>2001</b>	<b>2003</b>	<b>2001</b>	<b>2003</b>
<b>Highest Education Completed</b>						
Bachelor Degree or More in ECE/CD*	3%	4%	3%	5%	1%	2%
Bachelor Degree or More in Other Field	9%	10%	10%	10%	5%	7%
Associate Degree in ECE/CD*	6%	10%	7%	11%	3%	5%
Associate Degree in Other Field	4%	4%	4%	4%	4%	5%
High School + Any College Courses	60%	55%	62%	55%	56%	52%
High School + Workshops	10%	3%	8%	2%	15%	7%
High School Only	6%	13%	5%	12%	11%	19%
Less than High School	2%	2%	1%	1%	5%	3%
<b>Other Education Credentials</b>						
N.C. EC Credential	54%	68%	61%	72%	36%	52%
N.C. EC Administration Credential	9%	15%	11%	15%	5%	8%
B-K/Preschool add-on Teacher Licensure	no data	2%	no data	3%	no data	0%
Child Development Associate (CDA)	3%	7%	4%	8%	2%	5%
<b>Educational Pursuits</b>						
Currently Taking ECE/CD Courses	31%	32%	32%	32%	30%	32%
Interested in Taking Courses**	44%	49%	43%	48%	50%	55%

\* ECE/CD = Early childhood education/child development. Data from 2001 have been revised for better comparison to the current data. Only those respondents who specifically mentioned "early childhood education" or "child development" as their degree field are included in the 2001 data reported in this table.

\*\* Percentages were drawn from the survey respondents who were not currently taking courses.

## Earnings of the Child Care Workforce

Child care provider earnings in North Carolina remain low (see Tables 7 and 8). The median self-reported wage of child care teachers and assistants in North Carolina is only 50% of the starting wage of public school teachers (\$14.58 per hour, not including county supplements). Child care center directors' median self-reported wage barely competes with that of the public school teachers despite the added responsibility of running a business and working year round. Some child care providers (10% of teachers, 11% of assistant teachers and 10% of family child care providers) said that they worked another paid job in addition to their job as a child care provider. The median number of hours worked in these additional jobs was 15 for teachers, 15 for assistants and 20 for family child care providers.

**Table 7**  
Self-Reported Earnings (Not Including Salary Supplements) of Center Directors and Family Child Care Providers

	<b>Center Directors</b>		<b>Family Providers</b>	
	<b>2001</b>	<b>2003</b>	<b>2001</b>	<b>2003</b>
Highest Hourly Earnings (90th Percentile)	\$17.79	\$18.75	\$10.36	\$10.48
Median Hourly Earnings (50th Percentile)	\$11.00	\$12.00	\$5.57	\$5.71
Lowest Hourly Earnings (10th Percentile)	\$7.00	\$7.55	\$1.13	\$1.62

Median annual earnings for center directors, using the reported median of 40 hours per week for 52 weeks and the median hourly wage of \$12.00, were \$24,960. As previously mentioned for family child care providers, median net annual earnings were \$16,725. Based on the Consumer Price Index, median hourly earnings (without salary supplement) in 2001 were equal to \$11.43 for directors (\$23,774 per year) and \$5.79 for family child care providers (\$16,594 per year) in 2003.

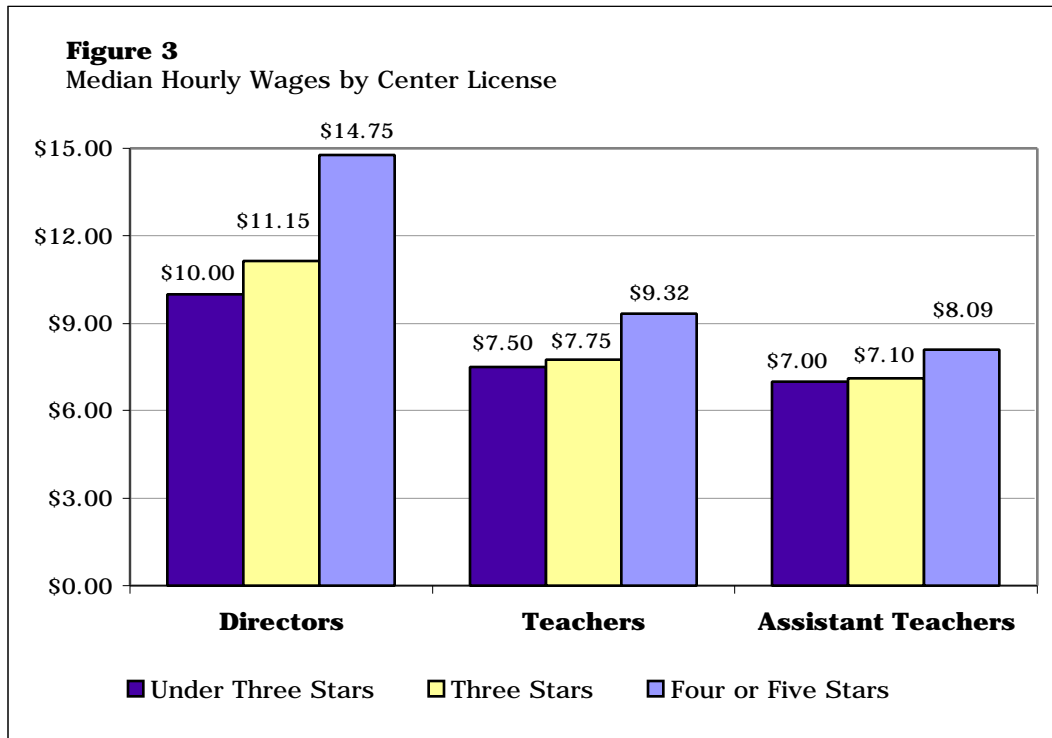
**Table 8**  
Self-Reported Earnings (Not Including Salary Supplements) of Teachers and Assistant Teachers

	<b>Teachers and Assistants</b>		<b>Teachers</b>		<b>Assistant Teachers</b>	
	<b>2001</b>	<b>2003</b>	<b>2001</b>	<b>2003</b>	<b>2001</b>	<b>2003</b>
Highest Hourly Earnings (90th Percentile)	\$10.81	\$12.00	\$11.00	\$12.08	\$9.68	\$10.94
Median Hourly Earnings (50th Percentile)	\$7.50	\$8.00	\$7.70	\$8.05	\$7.15	\$7.51
Lowest Hourly Earnings (10th Percentile)	\$6.00	\$6.00	\$6.00	\$6.00	\$5.50	\$6.00

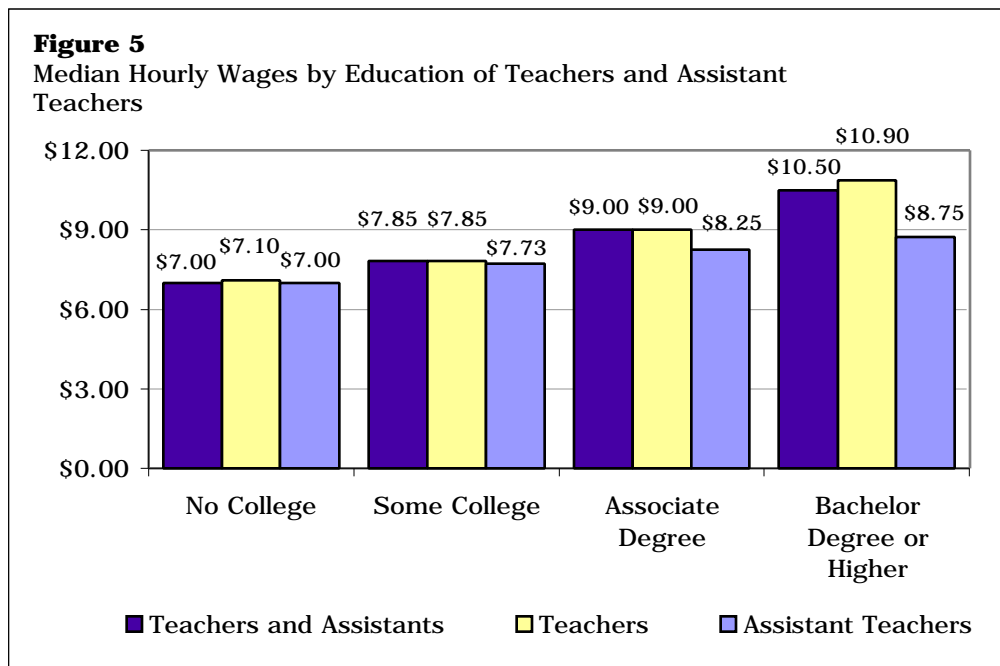
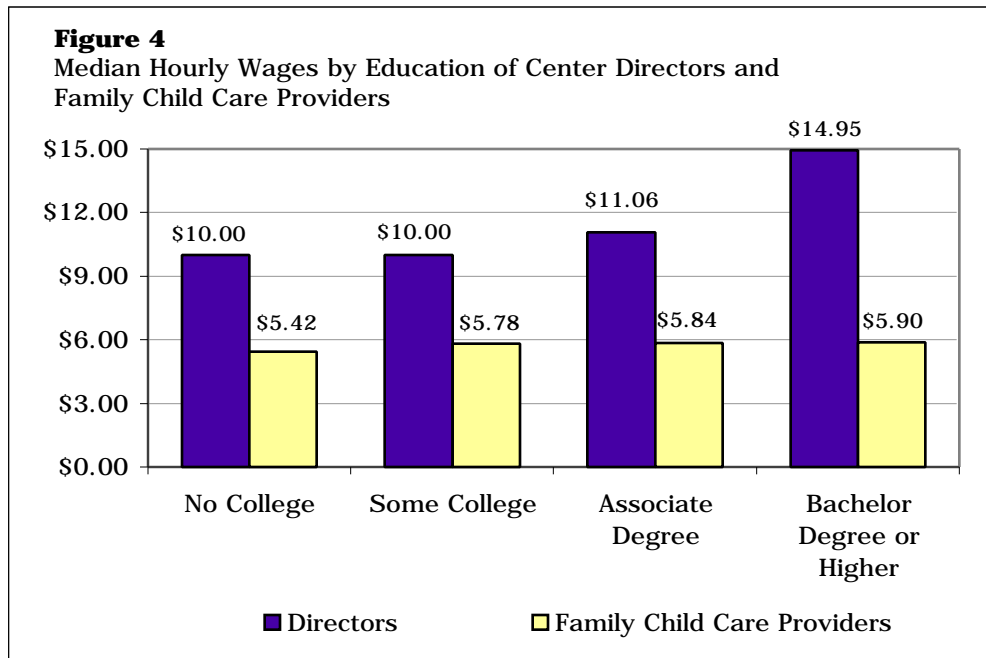
Adjusting these self-reported wages for inflation shows that pay increases over time were even smaller than they seemed. The adjusted hourly wage without supplement for each of the groups in Table 8 are as follows: teachers and assistants, \$7.79; teachers, \$8.00; and assistant teachers, \$7.43. Adjusted 2001 hourly wages at the 90th percentile were \$11.23 for teachers and assistants, \$11.43 for teachers and \$10.06 for assistant teachers. Real losses occurred at the 10th percentile, with adjusted 2001 hourly wages at \$6.23 for teachers and assistants, \$6.23 for teachers and \$5.71 for assistant teachers.

Figure 3 provides the self-reported wages of child care center staff based on program license. For each of the three workforce groups in the figure, it appears that centers with 3 stars and centers with fewer than 3 stars were more similar to each other than either was to centers with 4 or 5 stars. Though teachers and assistants in 4- and 5-star centers earn the highest wages across license groups,

the largest percentage differences between director salaries and wages paid to teachers and assistants appear to be in 4- and 5-star licensed centers.



How do wages in the child care field compare to education levels of the workforce? Figures 4 and 5 show the median hourly wages earned by center directors, teachers, assistant teachers and family child care providers at four levels of education. Increasing levels of education among family child care providers appears to be related to higher earnings. Whereas the percentage increase from having no college experience to having a bachelor degree or more was 50% for directors and 50% for teachers and assistants, the increase in earnings for family child care providers was only 9%.



Center directors reported pay rates for center teaching staff, including the starting wages and the highest wages paid to teachers and assistants. Unlike self-reported earnings, these data highlight wage ranges within child care centers. Median starting wages for teachers (not including assistants) were \$6.50 per hour in 2001 and \$7.00 per hour in 2003, and the median highest wages earned in centers were \$8.00 per hour in 2001 and \$8.83 per hour in 2003. Assistant teachers had median starting wages of \$6.50 per hour and median highest wages of \$7.50 per hour in 2003. The difference between the starting and highest wages provides insight into the possibilities for earnings growth. In a typical program, assistant teachers had an earnings growth potential of \$1.00 per hour (a 15% increase) while teachers had an earnings growth potential of \$1.83 per hour (a 26% increase). Given that assistant teachers can eventually become teachers, the median earnings growth potential across these

positions is \$2.33 per hour (a 36% increase).

Earnings growth potential within child care centers varies depending on program license (see Table 9). The highest pay rates and highest percentage increases in pay were in the 4- and 5-star centers. For example, the typical teacher working in a 4- or 5-star center with a starting wage of \$8.00 per hour could expect to see hourly wages increase over time to \$10.50 per hour. An assistant teacher working in the same 4- or 5-star center, with a starting wage of \$7.00 per hour, could eventually become a teacher and see an increase of up to \$3.50 per hour (a 50% increase).

**Table 9**

Pay Rates (Reported by Directors) in Child Care Centers by Center License

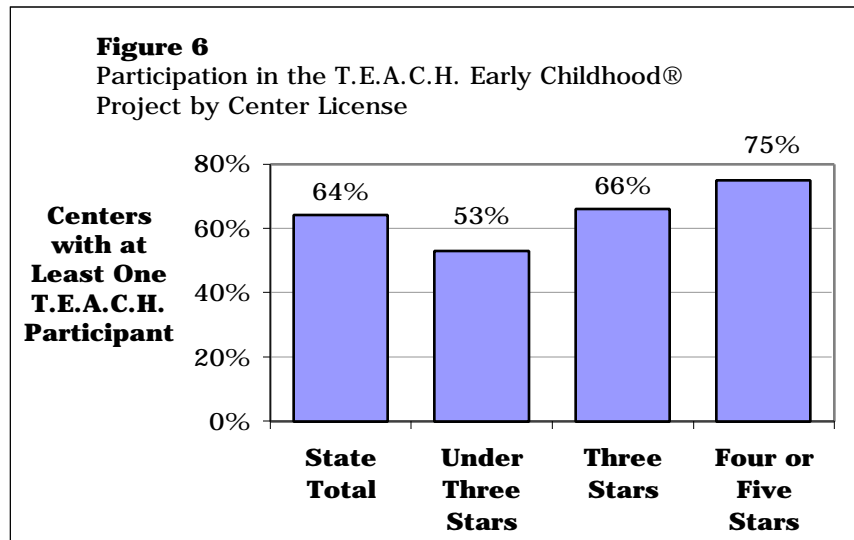
<b>Teachers</b>	<b>Median Starting Wage</b>	<b>Median Highest Wage</b>	<b>Percentage Increase</b>
4- or 5-Star Centers	\$8.00	\$10.50	31%
3-Star Centers	\$7.00	\$8.50	21%
Under 3-Star Centers*	\$6.75	\$8.00	19%
<b>Assistant Teachers</b>	<b>Median Starting Wage</b>	<b>Median Highest Wage</b>	<b>Percentage Increase</b>
4- or 5-Star Centers	\$7.00	\$8.50	21%
3-Star Centers	\$6.25	\$7.00	12%
Under 3-Star Centers*	\$6.00	\$7.00	17%

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

## Professional Support for the Child Care Workforce

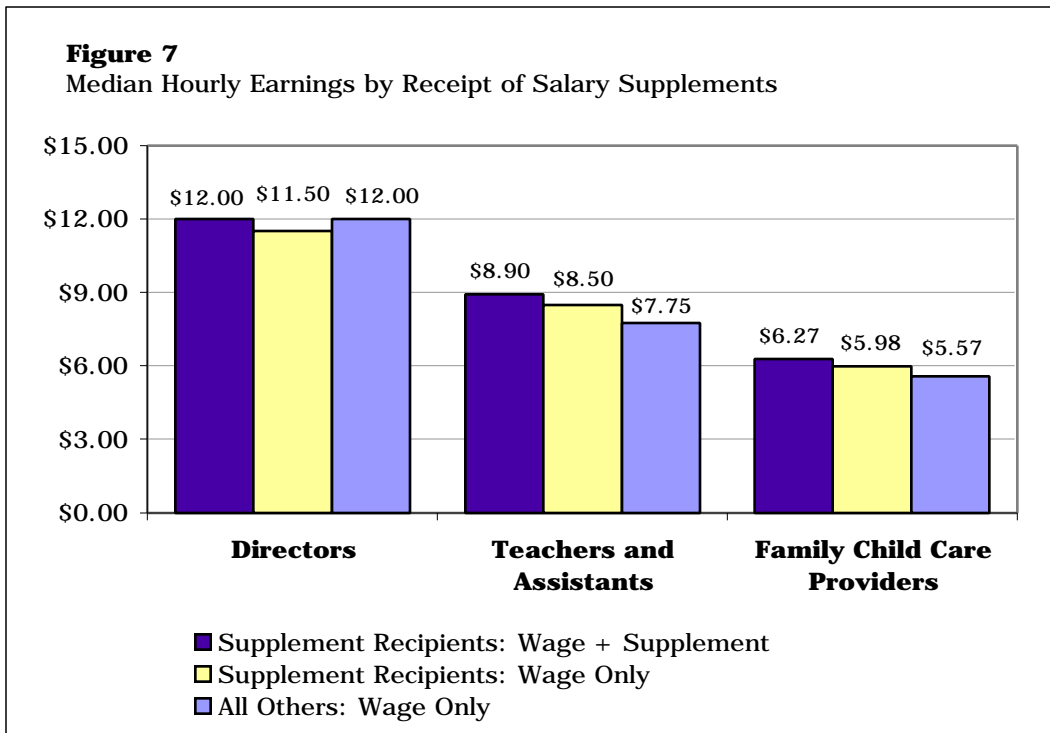
Early childhood research has shown that higher education and compensation of child care providers can lead to positive outcomes for children. Programs such as the T.E.A.C.H. Early Childhood® Project and salary supplements have addressed the educational and financial needs of child care providers while 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, 64% (compared to 59% in 2001) of centers in North Carolina had at least one staff member that had received a T.E.A.C.H. scholarship at some time. Twenty-five percent of teachers, 22% of assistant teachers and 24% of family child care providers said that they had received a T.E.A.C.H. scholarship. Figure 6 shows that participation in T.E.A.C.H. is higher among centers with a 4- or 5-star license than among all other centers. Ninety-nine percent of center directors, 96% of teachers and 97% of family child care providers had heard of the T.E.A.C.H. Early Childhood® Project.



**Salary Supplements.** Among North Carolina teachers and assistant teachers, 37% reported receiving a Smart Start funded salary supplement. The median supplement amount was \$300 per year. Of those receiving the supplement, 85% said it had encouraged them to continue in the child care field. Additionally, 44% of directors reported receiving a supplement at a median of \$820 per year. Of these directors, 79% said the supplement had encouraged them to stay in the field. Thirty-one percent of family child care providers reported receiving a supplement at a median of \$300 per year. Of these providers, 79% said receiving a supplement had encouraged them to stay in the field.

Figure 7 shows earnings of the child care workforce with and without the addition of salary supplements. As indicated in the figure, the median hourly gain in earnings for salary supplement recipients was \$.50 for center directors, \$.40 for teachers and assistants and \$.29 for family child care providers. Income eligibility limits for salary supplements may help explain why center directors who did not receive salary supplements had the same median hourly earnings as directors with a salary supplement. Salary supplements made a difference for the directors, teachers and family child care providers who were not already earning high wages.



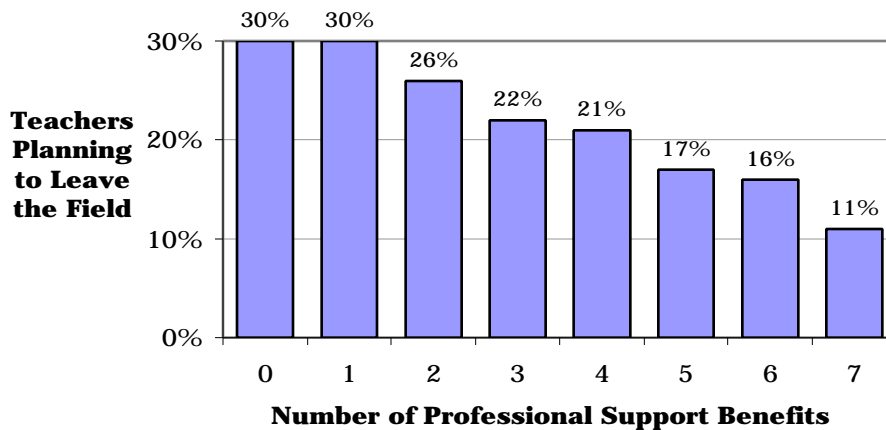
**Other Center-Provided Support.** Child care centers can support the professional development of their staff without creating a significant financial burden on their programs. Seven key types of professional support that centers can provide staff are an orientation, written job descriptions, written personnel policies, paid education and training expenses, paid breaks, compensatory time for training and paid preparation or planning time (see Table 10). Most centers (71%) in 2003 offered at least five of these types of support, and 6% offered two or fewer.

**Table 10**  
Professional Support Benefits for Staff in Child Care Centers

	2001	2003
Orientation	91%	91%
Written Job Description	90%	92%
Written Personnel Policies	84%	90%
Paid Education/Training	72%	78%
Paid Breaks	58%	61%
Time Off for Training	54%	52%
Planning/Preparation Time	53%	62%

Providing a professional work environment may be a low-cost means for centers to reduce staff turnover. Whereas 22% of teachers statewide said that they would leave the child care field in three years, only 11% of the teachers in centers offering all seven of the benefits listed in Table 10 said the same (see Figure 8). Without further study of the data, it is unclear whether these benefits alone lower turnover. However, the pattern across levels of support is striking.

**Figure 8**  
 Teachers Planning to Leave the Child Care Field in Three Years by Number of Professional Support Benefits Received from Center



### Experience and Turnover of the Child Care Workforce

Young children need experienced, well-educated caregivers with whom they can form close attachments over time. 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 11). Among center directors, 87% had been working in the child care profession for at least 5 years. Fifty-eight percent of teachers (not including assistants) had this level of experience. Among family child care providers, 56% had been in business for at least 5 years.

Many survey respondents were new to their child care programs. Twelve percent of center directors, 26% of teachers, 28% of assistant teachers and 7% of family child care providers had been at their current program for less than 1 year.

**Table 11**  
 Child Care Workforce Experience

	<b>2001</b>	<b>2003</b>
Teachers Years in Current Center	2.0	2.3
Teachers < One Year in Current Center	30%	26%
Teachers Years in Child Care Field	6.0	5.9
Assistant Teachers Years in Current Center	1.0	2.1
Assistant Teachers < One Year in Current Center	44%	28%
Assistant Teachers Years in Child Care Field	3.0	5.3
Directors Years as Director in Current Center	4.2	5
Directors Years in Child Care Field	12	13
Family Child Care Providers Years as FCC Provider	4.5	5.4

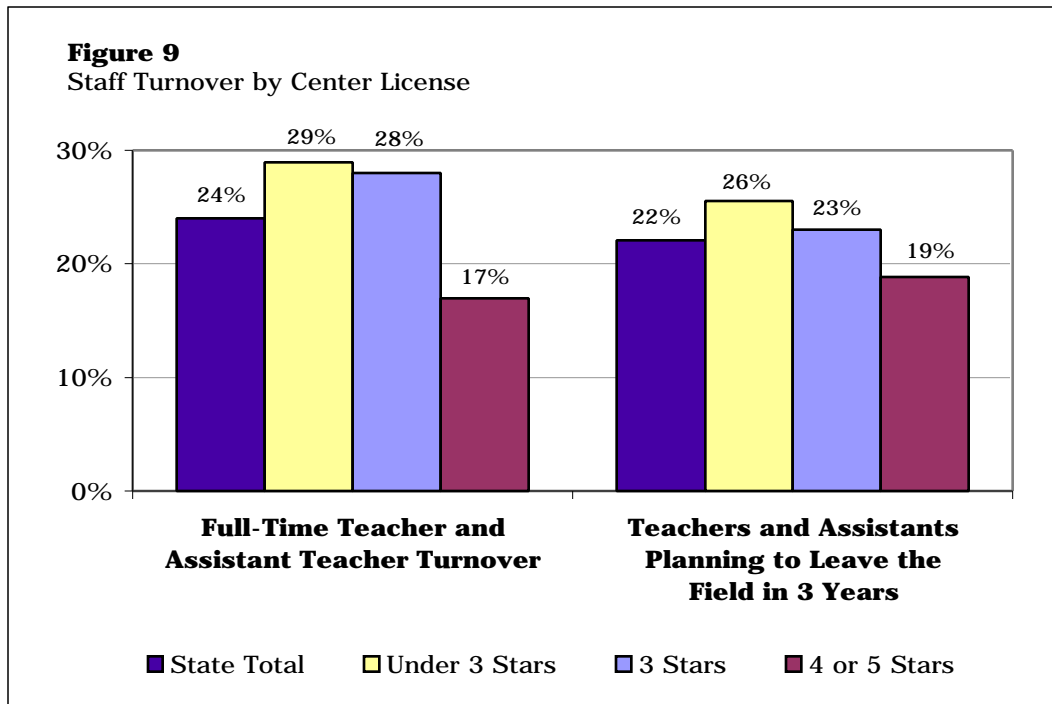
The current survey included two measures of turnover: (1) for center-based teacher turnover, the percentage of child care teachers and assistants who left their centers during the previous year and (2) for individual directors, teachers and family child care providers, the percentage of workers who are planning to leave the child care field in the next 3 years (see Table 12). As a proportion of all full-time teachers and assistants, 24% left their centers during the previous 12 months.<sup>3</sup> Of the centers that responded, 38% 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. Turnover in North Carolina centers has decreased since the 2001 workforce survey.

	<b>2001</b>	<b>2003</b>
Full-Time Teacher and Assistant Teacher Turnover	31%	24%
Part-Time Teacher and Assistant Teacher Turnover	34%	28%
Teachers and Assistants Planning to Leave the Field in 3 Years	25%	22%
Teachers Planning to Leave the Field in 3 Years	24%	22%
Assistant Teachers Planning to Leave the Field in 3 Years	29%	21%
Directors Planning to Leave the Field in 3 Years	11%	9%
Family Child Care Providers Planning to Leave the Field in 3 Years	15%	13%

Survey respondents planning to leave the field commonly indicated that higher earnings would encourage them to stay. This was true for 32% of directors, 78% of teachers, 80% of assistant teachers and 38% of family child care providers. Different motivators among the groups stemmed from the unique roles and responsibilities of each group, though all three were generally interested in additional support for the work they do (e.g., increased program funds, better employment benefits and more substitute teachers). Of those planning to leave the field, some directors (9%), teachers (22%), assistant teachers (21%) and family child care providers (13%) said that they were leaving for reasons not likely influenced by additional support (e.g., retirement).

Staff turnover rates in child care centers varied by center license. Figure 9 shows turnover rates by center license among full-time teachers and assistants, as reported by the directors, as well as the percentage of teachers and assistants planning to leave the child care field in 3 years. Turnover is much lower in 4- and 5-star centers than in all other centers. Note: Full-time teacher and assistant teacher turnover in faith-based centers with a letter of compliance (GS-110) was 21%, and turnover in the “under 3 stars” group after removing GS-110 centers was 33%.

<sup>3</sup> Turnover data reported by center directors with less than one year of employment in the centers were not included in the turnover calculation.



### More at Four Sites and Staff

All child care centers that were participating in More at Four as of March 2003 were sent surveys as a part of this study (230 More at Four sites with 2,715 teachers). Both center directors and all teachers in the programs were asked to respond to the survey. The number of directors of More at Four programs was reduced to 201 when phone calls to centers revealed that several directors managed more than one More at Four site. The total number of More at Four directors who completed a survey was 165 for a response rate of 82%. More at Four teacher data in this report includes the 447 teachers working in More at Four programs who said that they have at least one More at Four participating child in their classroom. Overall teacher response in More at Four sites was 57% of total teachers in these programs (note: the response rate is based on all teachers in More at Four programs, including teachers who did not have any children participating in More at Four). The survey data on More at Four sites and providers were collected for the first time in the current study, so this report serves as a baseline assessment of several More at Four population variables.

As with the More at Four sites, certain non-More at Four centers were given questions about whether they met the More at Four participation criteria and whether they were interested in enrolling More at Four children. The total number of director surveys collected from these other programs was 2,039, and the total number of teacher surveys was 11,573. Survey data from these programs and their staff are included for comparison to the data collected from the More at Four programs and their staff. For this report, the only non-participating programs compared to More at Four programs were those currently enrolling four year olds.

**Participating More at Four Sites.** The responding More at Four programs were in 65 counties across the state. They represented the full mix of programs participating. See Table 13 for more detail on their organizational structure.

**Table 13**  
The More at Four Sites Surveyed in North Carolina

<b>Organizational Structure</b>				
For-profit Centers	Non-profit Faith-based Centers	Non-profit Independent Centers	Non-profit Govt. Centers	Other
52%	7%	20%	20%	1%

Almost all of the More at Four sites (96%) said that the teachers in their four-year old classroom used one of the More at Four approved curricula, with Creative Curriculum for Early Childhood the most common by far (84%), and Bright Beginnings Pre-K Curriculum (11%) in use by a few.

Many of the responding More at Four sites indicated that they did not yet meet all of the More at Four criteria. The criteria presenting the greatest challenges included having at least one lead teacher with the B-K/Preschool add-on teacher licensure (58% did not meet this criterion), paying teachers with the B-K/Preschool add-on teacher licensure rates equal to public school teachers (66% did not meet this criterion) and having a director with a Level III Child Care Administration Credential (52% did not meet this criterion). Site directors indicated that their programs needed help in the following areas to meet standards: funding to offer better teacher pay and benefits (69% needed help with this), funding to cover income lost due to reduced class size (48%) and finding teachers who meet More at Four qualifications (45%). Of those who indicated “teachers who meet qualifications” as an area in which help was needed, 84% had teachers who received a scholarship from the T.E.A.C.H. Early Childhood® Project.

Comparing More at Four sites to non-participating centers that enrolled four-year olds revealed interesting similarities and differences based on program and staff characteristics (see Table 14). More at Four sites and 4- and 5-star centers were similar on the compared characteristics. As would be expected from the More at Four requirements, More at Four sites did exceed 4- and 5-star centers on staff education, highest paid teacher and the compared benefit items. Turnover rates, however, were higher in More at Four programs than in the 4- and 5-star centers. Changes in programs’ organization or operations can affect turnover, which could be the explanation here because More at Four is so recently established. Furthermore, turnover in More at Four sites was lower than the statewide turnover rate of 24% of full-time teachers and assistants and much lower than turnover in centers with fewer than 4 stars.

**Table 14**

Characteristics of More at Four Sites Compared to Other Centers Serving Four Year Olds

Program Characteristics	Centers Not Participating in More at Four			
	More at Four Sites n= 165	4- and 5-Star Centers Enrolling Four Year Olds n= 445	3-Star Centers Enrolling Four Year Olds n=664	Centers with Fewer than 3 Stars Enrolling Four Year Olds* n= 623
Have at Least One Teacher with a Two-Year Degree or More in ECE/CD	79%	71%	50%	48%
Have at Least One Teacher with B/K or Preschool Add-on Teacher Licensure	27%	23%	12%	12%
Starting Teacher Salary (median)	\$8.00	\$8.00	\$7.00	\$6.75
Highest Teacher Salary (median)	\$10.50	\$10.10	\$8.35	\$8.00
Director Salary (median)	\$14.00	\$14.50	\$11.00	\$10.00
Fully Paid Health Insurance Offered	27%	25%	8%	10%
Retirement Benefits Offered	49%	45%	18%	17%
Paid Preparation or Planning Time Offered	74%	72%	58%	58%
Turnover of Full-Time Staff	20%	16%	28%	30%

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

**More at Four Teachers.** Teachers who said that they had at least one More at Four child in their classroom and whose centers were listed as More at Four sites (n=447 teachers) are included in this report. When comparing these teachers to other responding teachers, interesting differences are noted even when looking at programs where the star ratings are the same. As would be expected due to More at Four's education requirements, teacher education in More at Sites was higher than it was in non-participating centers. More at Four teachers were more likely than the teachers working in 4- or 5-star licensed centers to have a four-year degree either in early childhood or some other field. Differences between More at Four teachers and other teachers in 4- or 5-star programs at the Associate degree level were minimal. See Table 15 for more detail.

Given More at Four's education requirements for participating teachers, the differences between these teachers and all others are to be expected. Similarly, compensation of More at Four teachers corresponds with their higher level of education and their greater likelihood of working in centers (4-5 star, non-profit) that typically pay better overall than other centers. Many More at Four

teachers are striving to meet higher educational levels with 29% indicating they have received a T.E.A.C.H. Early Childhood® Scholarship.

**Table 15**

Characteristics of More at Four Teachers and Assistants Compared to Other Teachers and Assistants Working with Four Year Olds

Teacher Characteristics	Teachers Not Participating in More at Four			
	More at Four Teachers n= 447	Teachers in 4- and 5-Star Enrolling Four Year Olds n= 4,554	Teachers in 3-Star Centers Enrolling Four Year Olds n= 4,529	Teachers in Centers with Fewer than 3 Stars Enrolling Four Year Olds* n= 3,547
Bachelor Degree or More in Early Childhood	13%	6%	2%	2%
Bachelor Degree or More in Other Field	20%	13%	7%	8%
Associate Degree in Early Childhood	17%	15%	7%	6%
Associate Degree in Other Field	4%	4%	4%	4%
B-K/Preschool add-on Teacher Licensure	10%	4%	1%	1%
Received a T.E.A.C.H. Early Childhood® Scholarship	29%	28%	25%	17%
Median Hourly Wage	\$9.27	\$9.00	\$7.50	\$7.50
Have Health Insurance Coverage	78%	81%	64%	65%
Less than One Year Experience in Current Center	30%	21%	27%	33%
Median Years in Early Childhood Field	6.0	7.0	5.0	5.0
Planning to Leave the Field in Three Years	20%	19%	23%	26%

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

**Increasing More at Four Service Capacity.** In terms of building program enrollment, 76% of the responding center directors at More at Four sites and 54% of the directors at other sites said that their centers would be willing to serve additional children through More at Four. The total number of children that centers said they would enroll was 1,452 children for More at Four sites and 8,260 children for other centers.

In summary, the challenges expressed by the directors in meeting More at Four criteria are reflected in the teachers' reports of their education, pay and benefits. While their pay is higher, about

one in five More at Four teachers still has no health insurance. While their rates of attaining higher education are higher than teachers in other child care programs, they are still striving to reach the standards set by More at Four. With 58% of center directors reporting that they need teachers with B-K/Preschool add-on teacher licensure, only 29% of More at Four teachers said that they had received a T.E.A.C.H.® Scholarship to help pay for their continuing education. The teachers currently working toward B-K certification or who may need to do so could better utilize available resources to ensure their own professional development and the continued development of quality early childhood services through More at Four.

## Conclusion

The data from this study profile a number of notable changes from 2001 to 2003, both positive and negative, in the child care workforce and its working conditions. For this discussion, data will be summarized in the context of changes in education, compensation and retention over time.

**Education.** Teacher education took an impressive leap in just two years, increasing from 22% to 28% of the teaching workforce with a two- or four-year degree. The most dramatic increase within this population of degreed teachers was a 67% increase of teachers with a two-year degree in early childhood education. In addition, this same time period saw a 26% increase in teachers with the N.C. Early Childhood Credential, often the starting point in the pathway to a two-year degree. Gains in the numbers of directors and family child care providers with associate's degrees in early childhood education were also evident. More at Four teachers were much more likely to have two- or four-year degrees, compared to all early childhood teachers or even when compared only to teachers in 4- and 5-star programs.

Respondents also expressed an interest in pursuing higher education. A high percentage of teachers (32%) are currently enrolled in coursework and an even higher percentage (49%) are interested in taking courses. Sixty-nine percent of family child care providers and 62% of directors were either taking or are interested in taking courses as well. The T.E.A.C.H. Early Childhood® Project continues to be a widely used vehicle for the workforce to attend college. One in four teachers and family child care providers cited participation in the program, and an increasing percentage of centers (64%) sponsored staff on T.E.A.C.H. scholarships.

**Compensation.** Over the past two years the child care workforce had gains and losses in overall compensation. More child care teachers are without health insurance and more have used one or more forms of public assistance in the last three years than in 2001. These losses may reflect the impact of the sagging economy and higher unemployment on the families of early childhood teachers and family child care providers. The good news is that teachers saw a small but real gain in their wages after controlling for inflation. This may be attributed to the increasing education of the workforce because it is clear that teachers with more education are being paid more. Higher wages may also be influenced by the increasing percentage of centers with four- and five-star licenses. The increasing number of More at Four classrooms found in regular child care settings may also be helping to drive up overall teacher salaries. Programs may be increasing compensation in order to retain the educated teachers they need to maintain their higher level of licensure or More at Four status.

Teachers with two-year degrees earn about \$2.00 more per hour than teachers with no college; teachers with four-year degrees earn about \$2.00 more per hour than teachers with a two-year degree. While these differential wage rates reflect a value on increasing education within the child care

workforce, the actual wages do not yet mirror the value placed on this level of education by other sectors of the job market, including public education.

**Retention.** Turnover rates declined sharply, down from 31% in centers in 2001 to 24% in 2003. The percent of the teaching workforce citing their plans to leave the field in the next three years also fell from 25% to 22%. As always, teachers reported that higher earnings would keep them in the field. Given that almost one-half (45%) of teachers live in households with overall earnings of less than \$20,000 a year, it is no wonder that retention is so clearly linked to better wages.

Over one-third of the teaching workforce received a Smart Start periodic salary supplement to encourage retention. For the typical teacher that supplement amounted to about an \$832 increase in earnings for the year. Given the tight job market, a real but modest gain in wages, and the increased compensation incentives available in the child care industry linked to retention, it is not surprising that turnover rates have declined.

## Appendix A Survey Methods and Response Rates

Child care programs selected for survey participation were drawn from January 2003 licensing reports of the North Carolina Division of Child Development. Programs that served only school-age children or that provided care only during the summer months were not surveyed. Sampling based on county workforce size was used to create representative samples within each county. Survey packets were mailed to 87% of the licensed centers (n=3,428) with enough questionnaires for 3,428 directors and 25,533 teachers and to 66% of the licensed family child care homes (n=3,382).

Survey packets for child care centers included a cover letter, questionnaire and postage-paid envelope for the director; cover letter, questionnaire and postage-paid envelope for each teacher; and raffle tickets for the director and teachers. Family child care providers received a cover letter, a questionnaire with postage-paid envelope, and a raffle ticket. As a sign of thanks and an incentive for participation, window stickers with an early childhood slogan were also included in the survey packets. In addition, everyone who returned a completed questionnaire and raffle ticket was entered in county- and state-level raffles for prizes. The survey questions used in this study were developed by the authors and were used in previous workforce research. The questionnaires were modified to include items relevant to child care centers participating in More at Four and to the Performance Based Incentive System created by the North Carolina Partnership for Children.

Child Care Services Association staff followed the initial survey mailing with a reminder postcard and repeated phone calls and survey mailings. Staff also made site visits to child care centers and family child care homes to ensure high survey response rates. Study representatives contacted local child care partnerships and resource and referral agencies to encourage local involvement. Upon receipt of center director and family child care provider surveys, CCSA staff called survey participants to clarify responses on the questionnaires to ensure the accuracy of the information collected.

The survey sample of 3,428 North Carolina centers was reduced to 2,839 when phone calls revealed that some centers had closed, were extension sites of other centers or were Head Start sites supervised by one area coordinator. Based on director reports of the number of teachers employed, the adjusted teacher count was 25,405. The survey sample of 3,382 family child care homes was reduced to 2,978 when phone calls revealed that some homes were no longer in business. A total of 2,203 director surveys, 13,120 teacher surveys and 2,337 family child care provider surveys were received. This yielded response rates of 78% for directors, 52% for teachers and 78% for family child care providers. Response rate goals of 70% for directors, 50% for teachers and 70% for family child care providers helped ensure strong representation of the child care workforce statewide.

### Survey Response Rates

	Potential Sample	Sample After Adjustments	Surveys Collected	Response Rate	Response Rate Goal
Directors (Centers)	3,428	2,839	2,203	78%	70%
Teachers	25,533	25,405	13,120	52%	50%
Family Child Care Providers	3,382	2,978	2,337	78%	70%

**Appendix B**  
**North Carolina's Child Care Centers and Center-Based Work Force**  
**Comparisons by Auspice**

Child Care Centers*	State Total	For-Profit Centers	Faith-Based Centers	Non-Profit Centers
	n= 2,203	n= 1,318	n= 363	n= 519
Mean Center Preschool Enrollment	46	44	49	54
Centers with 4-Star or 5-Star License	30%	24%	19%	52%
Turnover Rate of Full-Time Staff	24%	29%	21%	17%
Median Starting Teacher Wage**	\$7.00	\$7.00	\$7.00	\$8.50
Median High Teacher Wage	\$8.83	\$8.50	\$9.00	\$10.00
Fully Paid Health Insurance	14%	5%	14%	41%
Annual Vacation Days: 10 or More	36%	26%	43%	60%
Monthly Sick Leave: 1 Day or More	31%	21%	24%	63%
Job Protected Parental Leave	38%	31%	38%	57%
Retirement Contributions	27%	17%	20%	60%
Paid Education/Training Expenses	78%	74%	81%	86%
Paid Time off for Training	52%	45%	51%	70%
Provide Orientation	91%	91%	89%	95%
Reduced-Cost Child Care	47%	49%	34%	35%
Free Child Care	8%	8%	14%	5%
Median Preschool (3-5) Fee	\$105	\$110	\$95	\$104

\*Missing Data on 3 Centers; Item response rates may be lower

\*\*Means: State - \$7.54; For-profit - \$7.06; Faith-based - \$7.26; Non-profit - \$9.09

Center Directors*	State Total	For-Profit Centers	Faith-Based Centers	Non-Profit Centers
	n= 2,203	n= 1,318	n= 363	n= 519
Median Hourly Wage	\$12.00	\$10.94	\$11.87	\$14.00
Median # of Years in Center	5.0	5.5	4.0	4.0
Median # of Years in Child Care Field	13.0	13.0	12.8	13.0
Associate Degree or Higher in ECE	23%	21%	21%	32%

\*Missing Data on 3 Directors; Item response rates may be lower

Center-Based Teachers*	State Total	For-Profit Centers	Faith-Based Centers	Non-Profit Centers
	n= 13,121	n= 6,763	n= 1,940	n= 4,047
Median Hourly Wage	\$8.00	\$7.75	\$7.63	\$9.00
No Health Insurance	29%	37%	27%	16%
Median # of Years in Center	2.3	2.0	2.5	2.8
Median # of Years in Child Care Field	5.9	5.0	5.5	7.0
Associate Degree or Higher in ECE	14%	10%	9%	23%

\*Missing Data on 371 Teachers; Item response rates may be lower

Community Variables	State Total	For-Profit Centers	Faith-Based Centers	Non-Profit Centers
	n= 13,121	n= 1,318	n= 363	n= 519
Located in Urban Area	52%	52%	55%	45%
Unemployment Rate in County*	6.4	6.4	6.4	6.4
Bachelor's degree or higher, pct of persons age 25+**	19%	19%	19%	17%

\*2002 County data based on information provided by the United States Department of Labor

\*\*2000 County data based on information provided by the United States Census Bureau