



Working in Early Care and Education in North Carolina



2023
Workforce
Study

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Introduction

Over the years, a plethora of studies and reports have highlighted the benefits of early childhood education (ECE)—benefits for young children to gain access to additional social and educational experiences beyond their home/living environment, benefits for families who can access child care as they work or pursue higher education, and, benefits for the society at large, as families of young children can join the workforce.^{i,ii} Affordable and equitable access to high quality

ECE programs and to receive help to find high-quality care for their children.^{vii} Initiatives also offer families of young children access to affordable high quality ECE through subsidy or state-funded preschool programs for eligible children. In 2019, 18% of children under five enrolled in early care and learning programs attended publicly-funded programs. Despite these initiatives, the field of ECE in North Carolina has faced numerous challenges similar to those encountered nationwide,

Family Child Care (FCC) Homes provide early childhood education for children in their own homes. They are permitted to care for two to eight children for at least four hours a day. Up to five children can be under five. These providers offer a service that is both unique and traditional in its small size and ability to be more personalized. Families with preferences and needs for more familial environments and flexible financial arrangements tend to choose FCC Homes.^{xiv} In the state as well as across the country, the number of FCC Homes have been steadily shrinking. FCC providers cite a changing economy, difficulties with regulations and a general lack of support from legislation as potential reasons for the decline.ⁱⁱⁱ From 2014 to 2020 alone, over 1,100 FCC providers shut down in North Carolina.ⁱⁱⁱ

early childhood education allows young children to engage in age-developmentally appropriate activities that support their cognitive, social-emotional and physical development. Such access also provides a critical peace of mind for their families at work. Currently, over 3,800 ECE licensed centers in North Carolina, serve approximately 180,000 children under five years of age, while about 1,200 Family Child Care (FCC) Homes serve around 4,800 children under five.

North Carolina has often been referred to as a leader in early childhood education, launching initiatives supporting young children and their families, as well as ECE programs and their workforce.ⁱⁱⁱ For instance, a star-rated licensing system has been in place since the 2000s as one measure of quality of care provided in ECE programs. Centers and FCC homes rated as 4- or 5-star are considered higher quality care, having met higher standards than the minimum required. In 2019, 66% of centers and 50% of FCC homes were rated 4- or 5-star.^{iv} Similarly, North Carolina initiatives also provide early childhood educators easier access to college education^v and salary supplements for prior educational achievements.^{vi} Consumer education and referral services allow families to learn about ECE, high-quality

affecting both families of young children and ECE providers. For instance, families' child care fees can represent up to thirty percent (30%) of a family income.^{viii} By contrast, ECE providers receive wages often below living wages. In 2019, the median hourly wage for the ECE teaching staff was \$12.00 per hour across the state of North Carolina.^v As a comparison, a living wage for an adult living with one child in North Carolina in 2019 was estimated to be \$29.32 per hour.^{ix}

The COVID-19 pandemic has amplified old issues and created new challenges, as early childhood professionals had to navigate classroom and program closures, new health policies, virtual teaching, etc. During the lockdown of spring 2020, centers were more likely to close than homes, nationwide^x and in North Carolina.^{xi} School based Pre-K and Head Start were also more likely to close. In North Carolina, school based public Pre-K were physically closed.^{xi} Across North Carolina and more broadly, across the U.S., fewer children participated in ECE programs, with children in poverty being the most affected.^{xii} Families also reported participating less in home activities (e.g., reading to children, teaching letters, words, numbers) with children three to five during the lockdown of 2020.^{xiii}

Still, North Carolina was one of the first states to offer funds from the American Rescue Plan Act (ARPA) to sustain and stabilize the field, limiting the closure of programs, and providing initiatives such as waiving parent fees for subsidy, bonuses for child care providers, health supplies, and supporting the mental health of early childhood educators.^{xii} For instance, the North Carolina Department of Health and Human Services offered Hope 4 Healers, providing educators with a free 24/7 hotline for mental health and resilience support through licensed mental health professionals. Despite the challenges brought by the pandemic, thousands of children across the state received, and continue to receive, high quality of care and educational services from qualified and dedicated early childhood professionals.

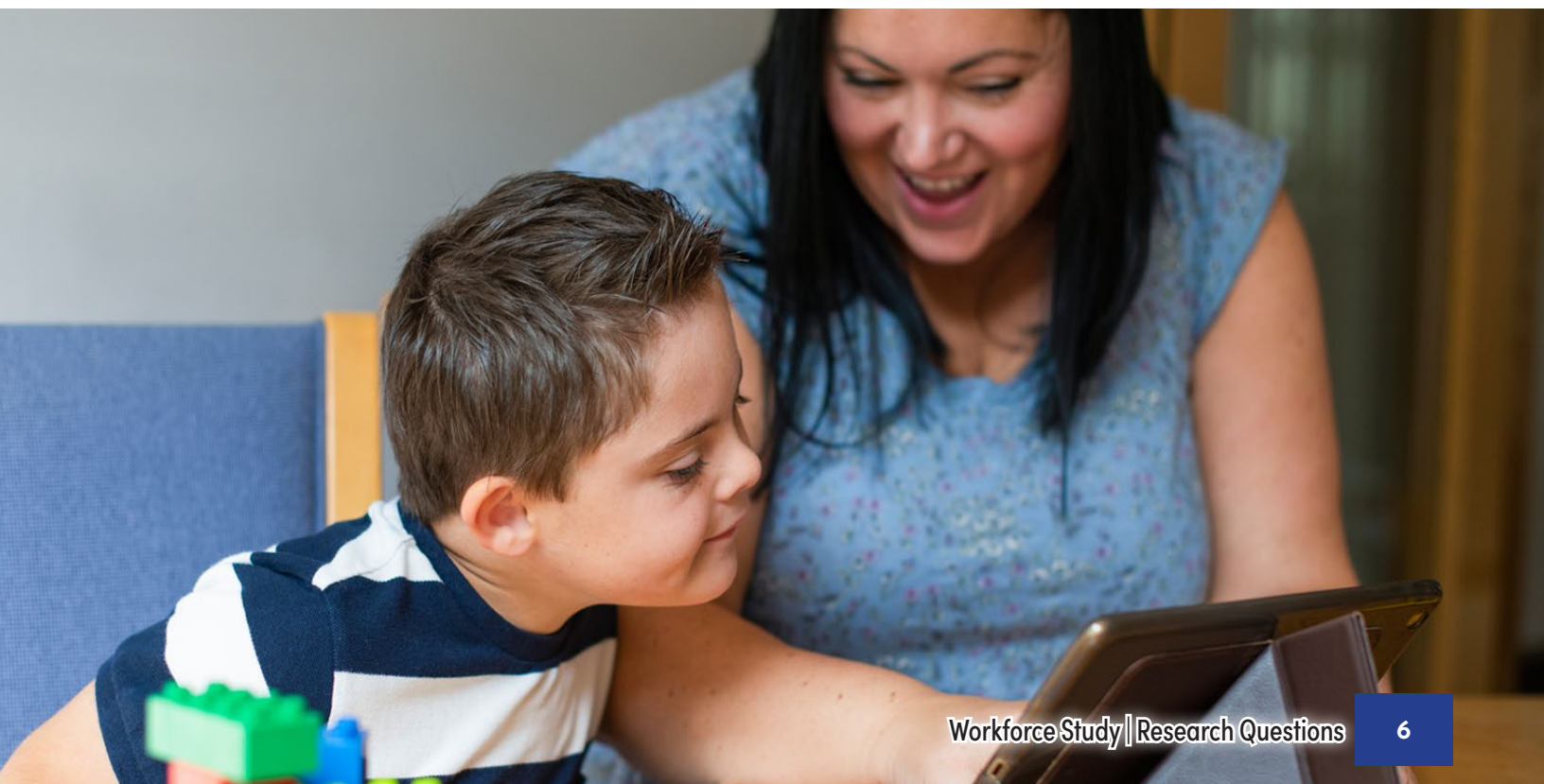
The 2023 “Working in Early Care and Education in North Carolina” workforce study report examines the state of early childhood education, through the lens of the administrators,

teachers, assistant teachers and FCC providers serving children under five. Data collection was completed between September 2022 and October 2023 and included the collection of both quantitative and qualitative data. Through funding from the North Carolina Department of Health and Human Services, quantitative data were collected from surveys sent to licensed ECE programs across the state. In addition, funding from Blue Cross Blue Shield Foundation provided the opportunity to hear directly from the provider community through qualitative data obtained during focus groups and interviews. A first aim of the study was to provide comprehensive data on licensed ECE programs^{xv} and their workforce (teachers, assistant teachers, and administrators in ECE centers, as well as FCC providers). A second aim of the study was to elevate the experiences of the ECE workforce throughout the pandemic and report their suggestions to rebound from the pandemic and strengthen the field of ECE.

Research Questions

The research question guiding the quantitative inquiry was: “What are the characteristics of licensed ECE programs across North Carolina and their ECE workforce and how does it compare to prior to the pandemic?”

The research questions that guided the qualitative inquiry was: “What do participants working as early childhood professionals in North Carolina say about their experiences during the pandemic? What do they suggest to move forward and strengthen the field of ECE?”



Methodology

Quantitative Study

Sample

A sample of ECE programs was selected from all NC licensed programs in August 2022. ECE programs serving only school-age children were excluded. A sample of 2,761 centers and 418 FCC homes across the state of North Carolina was selected as described hereafter.

Centers. The ECE center sample was designed to include various percentages of programs based on the number of centers in each county that serve children birth to five. In the smallest 80 counties in the state, 100% of the centers were included. These counties had fewer than 50 centers serving children birth to five. A stratified random sample was created for the remaining 20 counties to ensure that the sample closely resembled the overall population based on star level and size. For the fifteen counties that had 50 to 100 centers, a 70% to 71% sample was created for each of those counties. Three counties had 101 to 300 centers serving children from birth to five and 50% of those centers were included in the sample. Finally, for the two counties with more than 300 centers, a 30% sample was created. Statewide, 72% of licensed centers serving birth to five year olds were offered an opportunity to participate in the study.

FCC Homes. Because the number of FCC providers has decreased significantly over the last two decades leaving many counties with none of this type of care, sampling and reporting of this data is limited statewide. A stratified random sample of all licensed FCC providers in North Carolina that serve children birth to five was drawn based on geographic area (urban, suburban, rural) and star level. Each county in the state was assigned a geographic area as defined by the North Carolina Rural Center (www.ncruralcenter.org). The sample constituted about 33% of the population of all FCC homes serving children birth to five years old, with an oversampling in suburban areas to ensure adequate representation (i.e., 30% in rural and urban areas and 40% in suburban area).



Data Collection

Three surveys were designed to collect data from the workforce serving children birth to five, i.e., 1) administrators of ECE licensed programs, 2) teaching staff working in those programs and 3) FCC providers. Survey questions were similar to those asked during previous workforce studies (e.g., education, wages, professional background, demographics). Questions related to the workforce's experiences with the pandemic were added.

Prior to sending surveys, two administrators, one FCC provider and one teacher provided feedback on the questions.

Administrators

Administrators (e.g., center directors, principals) were sent an administrator survey multiple times through various means (online, mail or phone calls).

Useable surveys were obtained from 1,762 administrators, constituting 64% of the sample (n=2,761) of all administrators. This response represents about 46% of the total population of all licensed ECE centers serving children birth through five in the state (N=3,822). High response rates were achieved by providing a variety of means and opportunities for participants to respond.

Figure 1 breaks down the response methods for administrators and shows the importance of providing multiple avenues for survey completion. A high response rate ensures representation of the total statewide population as well as disaggregation to each of the 100 counties in North Carolina.

Teaching Staff

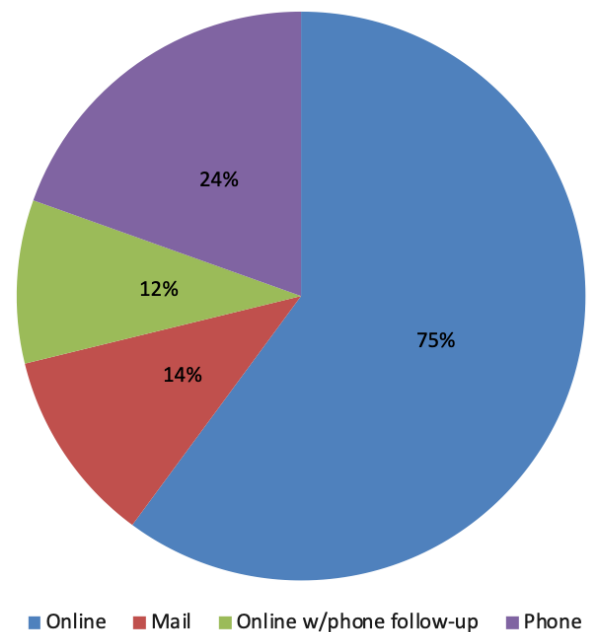
Administrators were also asked to distribute teaching staff surveys to their teaching staff serving children birth to five. Teaching staff surveys were first sent by mail. In order to increase teaching staff response rate, administrators were later sent by e-mail a QR code to provide their teaching staff. For those administrators who returned their surveys, multiple efforts were made to secure surveys from their teaching staff.

Usable surveys were returned by 5,361 of those teachers and assistant teachers out of an estimated 15,949 teachers and assistants in the participating centers (34%). Teacher participation rate fell below the goal rate for this study of 40% statewide.

FCC Providers

FCC providers were sent a FCC survey through various means, online, mail or phone calls. A total of 267 usable surveys were returned by FCC providers selected for the study (response rate of 64%).

Figure 1. Administrator Method of Survey Completion



Data analysis

Weight

Data were weighted to reflect the statewide populations of centers and teaching staff, adjusting for known characteristics associated with response bias.

For administrators, these factors included the location, size, sponsorship and star rating, as well as non-response rate. Each county was assigned an initial weight which was the estimated number of administrators in a county divided by the number of valid surveys returned by administrators in that county. That initial weight was then adjusted for the differential response tendency associated with center size, sponsorship and star rating. Most percentages and other values reported in text, tables and graphs incorporate these sampling weights, permitting extrapolation to the population of centers (N=3,822) serving children birth to five.

Similarly, the teaching staff survey data were weighted to account for the effects of non-response. Each county was assigned an initial weight which was the estimated number of teaching staff in a county divided by the number of valid staff surveys in that county. That initial weight was then adjusted for

the differential response tendency associated with the size and the star-rating level of the center where a teaching staff survey respondent was employed. The number of teaching staff in a county was estimated through a regression equation using as predictors the following variables available on the licensing file: center sponsorship type, star rating (4-levels), presence of a NC Pre-K classroom, and size of the program, assumed to be strongly correlated with staff size.

Finally, data collected from FCC providers were weighted to reflect the statewide population of FCC providers, adjusting for non-response rate, geographic areas and star level. Percentages and other values reported in tables and graphs incorporate these sampling weights, permitting extrapolation to the population of FCC programs (N=1,252) serving children birth to five.

Analysis

A variety of descriptive statistics were performed to report frequencies and medians. Throughout this report, the median value, i.e., the midpoint of the list of answers received, is usually reported as the measure of central tendency (for hourly wages, time intervals, etc.).



Qualitative study

In addition to survey data, qualitative data were collected in order to elevate the voices of the ECE workforce regarding their experiences with the pandemic and echo their suggestions to strengthen the field.

Participants

Administrators, teaching staff and FCC providers were invited to express their interest in participating in interviews or focus groups at the end of the survey. From that pool, a sample was selected so that stories from different regions, positions, star levels and center sizes could be shared. Those selected ECE professionals were invited by email multiple times and offered a \$50 gift card for participating either in an interview or a focus group. A total of 45 FCC providers, 68 teaching staff and 153 administrators participated in either an interview or a focus group.

Participants were invited to identify any important characteristics of themselves following interviews and focus groups, through an online form. A total of 28 interview participants responded to the online form. The ages of the

respondents ranged from 21 to 62 years old. Most respondents included their racial or ethnic identities: African American, Caucasian or White, Filipino-American, Latina, Native American, Jewish and “Spanish-speaking.” All that mentioned gender in the form identified as “female” or referred to themselves as women. Educational background was also mentioned, such as attending college, or receiving two Master’s degrees in education. Many also noted their length of time in the field as an important aspect of their identity. Participants reported having been in the field from six to over 30 years with a few working in multiple positions within the field.

Similarly to interview participants, thirty-four focus group participants across the state responded to the online form. The ages of respondents ranged from 24 years to 52 years old. Most self-identified as women or female. Regarding race and ethnicity respondents included that they were either African American, White/Caucasian or Latina. Upon reflecting on their careers in the field of ECE, respondents mentioned having worked in multiple centers or FCC homes. The years of experience in the field of the participants who completed the form ranged between 15 and 29 years.



Data Collection

A total of 95 interviews and 35 focus groups were conducted virtually between March 2023 and October 2023.

Participants were invited to reflect on one of three sets of questions - one primarily focusing on the participants' experiences during the pandemic, one primarily focusing on the lessons learned during the pandemic and one primarily focusing on ways to recover from the pandemic and strengthen the field moving forward. Those three sets of questions allowed for discussion on a wide range of topics while respecting the time of participants. Interviews lasted 30 to 45 minutes while focus groups lasted 90 minutes. Some of the questions asked were:

- ▶ From your personal experiences, what are the two to three most significant ways the pandemic changed your daily work as a professional in ECE? How did you adapt?
- ▶ Based on your experience, what practices created during the pandemic should the field consider maintaining post pandemic?
- ▶ As an early childhood professional, what support would help you move forward post pandemic / recover from the pandemic?
- ▶ Based on your experiences, what two or three strategies would you recommend the field of ECE to endorse regarding the recruitment of highly qualified early childhood professionals? What about strategies to retain highly qualified early childhood educators?

Data Analysis

Interviews and focus groups were conducted and coded by a group of four researchers. The team included members from diverse backgrounds with respect to gender, age, education, race/ethnicity and national origin. Meetings were conducted once a week to discuss processes and reflect on any possible biases.

Participants' words were used as a first round of coding, with themes coalescing to form a second round of coding. Attention was paid to themes that emerged across participants, but also single instances relevant to better reflect on the pandemic or strengthen the field of early childhood education.

For each theme that emerged from the interviews and focus groups, a few quotes were selected so that the voices of participants could be elevated throughout the findings section. Those quotes are presented in italics, with their sources.

Limitations

As with any data and research study, limitations exist. Many data collected from the surveys are self-reported, which may lead to social desirability bias (answering what you think you should answer) and question misunderstandings. In addition, the study was conducted in English only, while the strength of the ECE workforce goes beyond English speakers. Finally, the recruitment of the participants for interviews and focus groups was based on programs' characteristics, preventing analysis based on individual participants' identities (e.g., age, race/ethnicity, etc.).



Findings

The first section presents characteristics of licensed ECE programs across the state of North Carolina, such as the infrastructure of those programs, as well as characteristics of the workforce working in those programs. The second section presents the effects of the pandemic on the workforce and their programs. Finally, the last section presents suggestions from the workforce to rebound from the pandemic and strengthen the field of ECE.

Characteristics of ECE Programs

Infrastructure

Statewide, there were 3,822 centers, serving around 181,000 children under five and 1,253 FCC homes, serving about 4,900 children under five. In 2019, there were just over 3,900 centers serving 180,000 children under five, and 1,533 FCC homes serving about 4,800 children under five. While the number of centers has been fairly consistent since 2019, there was a decrease of 18% of FCC homes.

Centers served approximately 68,000 children under three, and about 112,000 children three to five. FCC Homes served about

2,500 children under three, and around 2,300 children three to five.

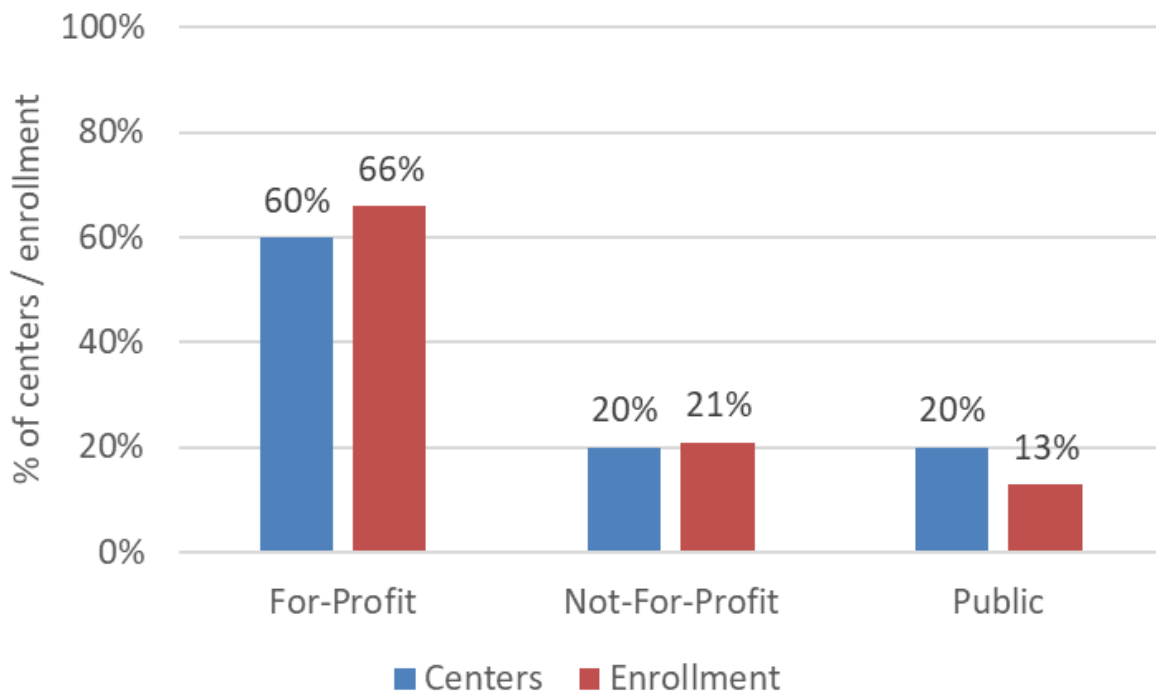
Across the state, the distribution of ECE programs varies considerably depending on their organizational structure (e.g., type of programs, auspice/sponsorship) and star level.

Organizational Structure

Although all FCC homes are privately owned, licensed centers in ECE can be described by their auspice or ownership, e.g., private or public.

Figure 2 compares centers by auspice. For-profit centers comprise the majority of both programs and enrollment in North Carolina, as 60% of programs and 65% of enrolled children fall under this category. Not-for-profit and public programs both account for 20% of all centers. Not-for-profit centers care for 20% of enrolled children while public centers care for 13%. Also, despite the decrease in number of programs and children enrolled since 2019, the percentages by auspice have remained fairly consistent.

Figure 2. Centers and Enrollment by Auspice



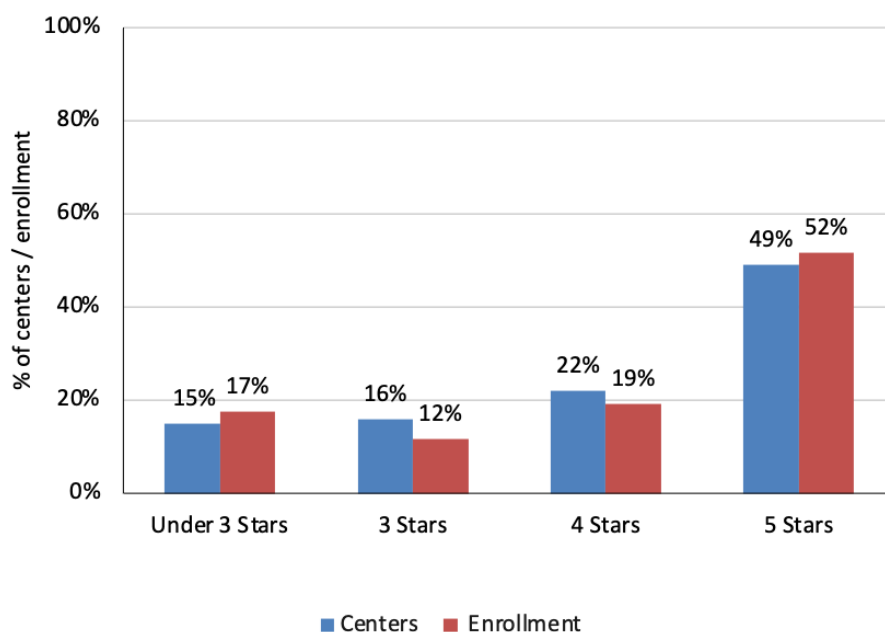
Star level & Quality of Care

Licensed programs can also be described by their star level, an indication of quality of care.

As shown in Figure 3, around 15% of licensed centers serving about 17% of the total enrollment of birth to five-year-olds in center-based care were operating under three stars. These programs include 1- and 2-star licensed centers, as well as GS-

110 notice of compliance centers and those with a temporary, provisional or probationary license. Sixteen percent of centers in the state had three stars and served about 12% of children birth through five enrolled in centers. Four-star centers represented 22% of centers and served 19% of the birth to five-year-olds enrolled in centers. Finally, 49% percent of programs serving 52% of enrolled children were 5- star centers. These data were consistent with data reported in 2019.

Figure 3. Centers and Enrollment by Star Level



Although all FCC homes are by definition for-profit businesses, differences in star ratings exist. Because FCC homes are licensed for a maximum of nine children, program percentage and enrollment track similarly. As presented in Table 1, 18% of FCC homes were under three stars (18% of birth to five children enrolled in these programs). Three-star homes accounted for 28% (26% enrollment). The largest percentage of FCC homes and enrollment were 4-star with 41% of homes (41% enrollment). Finally, 13% of FCC homes were 5-star with 15% enrollment of birth to five-year-olds. Examining programs by geographic area show minimal differences to the statewide breakdown with the exception of 4-star homes in rural areas (46% compared to statewide). Enrollment by geographic area shows slight differences to what was reported statewide.



Table 1. FCC Homes and Enrollment by Star Level

	Programs	Under 3 STAR*	3 STAR	4 STAR	5 STAR
Statewide	1253	18%	28%	41%	13%
Rural	445	17%	27%	46%	10%
Suburban	280	20%	29%	36%	15%
Urban	528	18%	27%	39%	16%

	Enrollment	Under 3 STAR	3 STAR	4 STAR	5 STAR
Statewide	4971	18%	26%	41%	15%
Rural	1716	18%	26%	46%	10%
Suburban	1109	20%	28%	34%	18%
Urban	2146	17%	25%	41%	17%

Source: DCDEE licensing data 8/22.

*: include 2 star, 1 star, temporary, provisional and GS-110 programs

NC Pre-K

Licensed centers have different characteristics whether they host public-funded classrooms or not. Table 2 presents the percentage of NC Pre-K classrooms depending on the type of organization, sponsoring agency, location and star rating. The percentage of NC Pre-K classrooms was higher in publicly sponsored programs, especially public school programs, than in non-publicly sponsored programs. In fact, 90% of licensed

school programs had an NC Pre-K classroom. In addition, nearly half of Head Start programs (41%) and “other public” programs (53%) also had NC Pre-K classrooms.^{xvi} On the other hand, only 18% of for-profit centers and 12% of not-for-profit centers had an NC Pre-K classroom. Finally, slightly more than half (51%) of 5-star centers in the state had at least one NC Pre-K classroom. Twelve percent (12%) of 4-star centers had an NC Pre-K classroom.

Table 2. Percentage NC Pre-K Classrooms by Programs

		Percentage NC Pre-K
Statewide	All Programs	28%
	For-Profit	18%
	Not-For-Profit	12%
	Public	73%
Type of Organization	Proprietary or Corporate	18%
	Community Board or Faith	12%
	Head Start Programs	41%
	Public Schools	90%
	Other Public	53%
Sponsoring Agency	Urban	18%
	Suburban	30%
	Rural	34%
Location	No stars through 3 stars*	2%
	Four Stars	12%
	Five Stars	51%
Star Rating		

Source: DCDEE licensing data 8/22.

*: include 2 star, 1 star, temporary, provisional and GS-110 programs



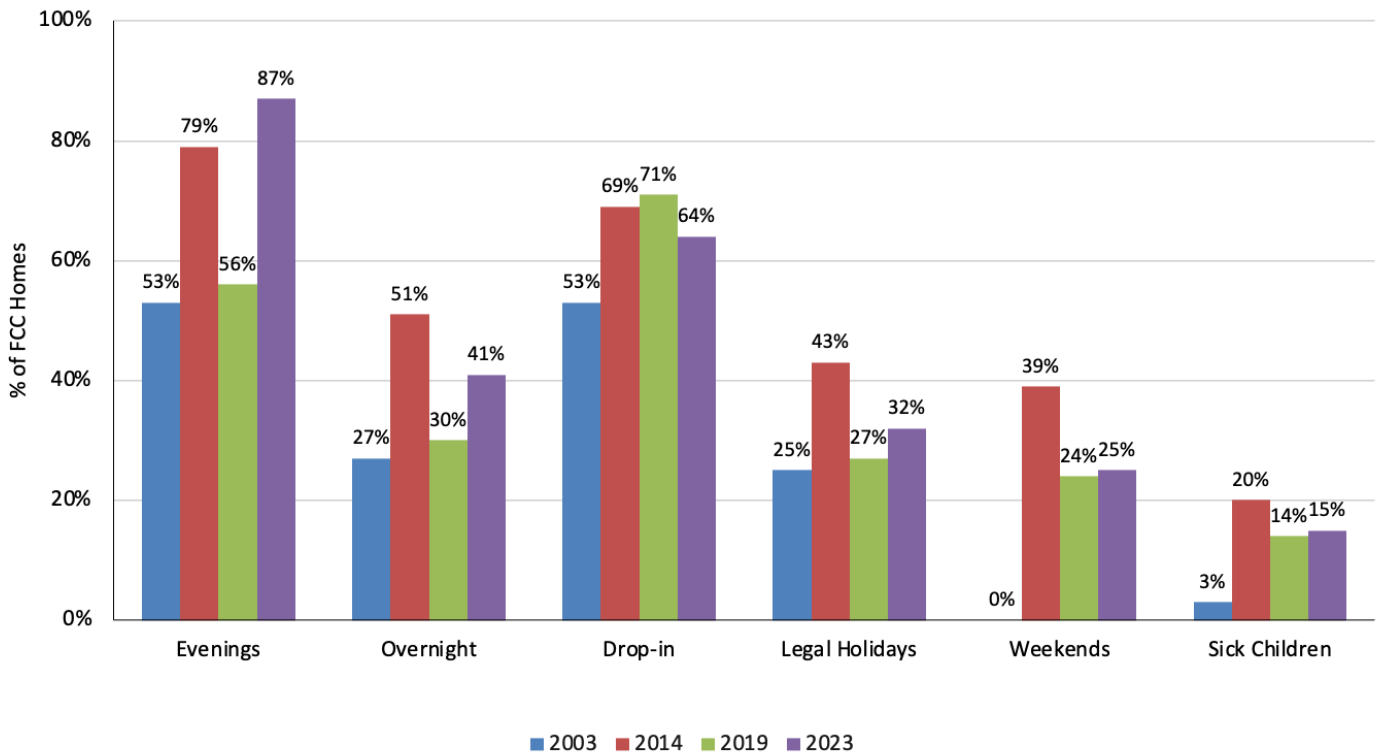
Services Offered by FCC Homes

As presented in Figure 4, FCC homes continued to provide unique services to the families they serve: evening care (87%), overnight care (41%), care for drop-ins (64%), care on legal holidays (32%), weekend care (25%) and care for sick children (15%). The percentages of FCC providers offering evening care and overnight care have increased since 2019, while the other types of care remained fairly constant.

ECE Workforce

The ECE workforce working in licensed child care programs included 3,822 administrators and 1,253 FCC providers, and an estimation of over 29,000 teaching staff. Administrators reported a wide range of teaching staff, from zero (other than themselves) to over 100 teaching staff, serving up to over 300 children from birth to five years old.

Figure 4. Services Offered by FCC Homes



Staffing

The child care center staff that participated in the administrator survey represented a wide variety of positions in the early childhood field. Weighting those responses to represent the total administrator population yielded results that show titles such as: director (61.8%); director/owner (29.0%); principal (4.4%); and various other titles (4.8%) such as manager.

Among staff who completed a teacher survey, about 71% identified themselves as teachers or lead teachers while about 23% were assistant teachers or floaters. Grouping these differing titles, along with the small percentage of “other” titles such as group leader, assistant, etc. resulted in about 72% grouped as “teachers” and 27% grouped as “assistant teachers.” A small number of teaching staff could not be reliably classified as either a teacher or an assistant teacher. These individuals are included in aggregate results describing the “teaching staff” but they are omitted from those analyses reporting data as two separate groups.

All teaching staff in the survey work with some combination of birth to five year olds at least some of the time. Respondents who indicated that they only work with the school-age

population were excluded from the study. Just over 54% of those filling out the teacher survey indicated that they work with infants, toddlers or twos at least some of the time. Also, just over half (55%) indicated that they work with preschool children (three to five year olds) at least sometimes. A small percentage of the teaching staff did not indicate the age group with which they work. These respondents were included in overall analysis but were excluded in discussions broken down by the age group taught.

Demographics and Other Characteristics of the Workforce

Table 3 presents 2023 demographic profile data for the ECE workforce. The median age for administrators (50 years old) and FCC providers (57 years old) has risen slightly from 2019. The 2019 median age for teaching staff was 40 years old compared with 38 years old in 2023. A total of 93.3% of administrators, 98.7% of teaching staff and 99.1% of FCC providers identified themselves as female, 6.5% of administrators, 1.1% of teaching staff and less than 1% of FCC providers identified as male. People identifying as non-binary represented 0.1% of administrators, and 0.2% of teaching staff (52 people).

Table 3. Demographic Profile of the ECE Workforce and Financial Status

	Administrator	Teaching Staff	FCC Provider
Median Age	50 yo	38 yo	57 yo
Female	93.3%	98.7%	99.1%
Male	6.5%	1.1%	0.9%
Non Binary	0.1%	0.2%	None reported
Asian/Pacific Islander	1.9%	1.6%	0.4%
Black/African American	40.9%	39.7%	71.9%
White/Caucasian	54.8%	49.4%	25.2%
American Indian/Native American	2.9%	3.1%	0.4%
Biracial/Multiracial	0.9%	2.0%	0.9%
Hispanic, Latinx or Spanish origin	1.5%	7.4%	1.3%
Other	1.2%	1.1%	None reported
Have at Least one child 0-18	51.0%	54.2%	31.3%
"Single Parent" with sole responsibility for child(ren) 0-18	15.2%	30.2%	21.9%

2023 surveys

Participants also reported races and ethnicity they identified as. Over seventy percent (71.9%) of FCC providers identified themselves as Black/African American, followed by 25.2% who identified as White/Caucasian. Nearly 55% of administrators identified as White/Caucasian followed by over 40% who identified as Black/African American. The smallest percentage (0.9%) of administrators identified as Biracial/Multiracial. For teaching staff, 49.4% of respondents identified as White/Caucasian, followed by Black/African American (39.7%). In addition, 7.4% of teaching staff identified as Hispanic, Latinx or Spanish origin, a most likely underestimated percentage as the study was pursued in English only. Approximately 3% of administrators and teaching staff identified as American Indian/Native American and nearly 2% of administrators and teaching staff identified as Asian/Pacific Islander.

Over half of administrators (51.0%) and teaching staff (54.2%) reported having at least one child aged from birth to 18 years old, compared to about 31% of FCC providers. Over 30% of teaching staff reported having sole responsibility for their child(ren).

Professional Background

Education

Young children do not come to child care as a blank slate. Instead, they bring their experiences with their families and communities. In order to serve all children and help them meet their full potential, ECE professionals should be knowledgeable and experienced in working with young children from various backgrounds. The workforce education is presented in Tables 4 and 5.

Administrators. Over 30% of administrators reported holding a Bachelor’s degree or higher in the field of early childhood education and child development, an increase of seven percentage points compared to 2019 (see Table 4). The percentage of administrators with a Bachelor’s degree or higher in other fields decreased from 39% in 2019 to 36% in 2023. The percentage of administrators holding an Associate degree in the field of ECE or in another field as highest education completed, was comparable between 2019 and 2023. Less than 1% of administrators reported high school only as their highest education completed. As of May 2023, degrees in elementary education, psychology and sociology were added to the list considered in the field of early care and education and child development. Overall, 61.2% of administrators reported holding a degree in the field of early care and education (compared to 59.8% if those new degrees had not been added).

Table 4. Education of the ECE Workforce

	Administrators		Teachers		Assistant Teachers		FCC Providers	
	2019	2023	2019	2023	2019	2023	2019	2023
<u>Highest Education Completed</u>								
Bachelor's Degree or More in ECE/CD	25%	32%	16%	20%	4%	9%	8%	10%
Bachelor's Degree or More in Other Field	39%	36%	18%	11%	14%	10%	9%	13%
Associate Degree in ECE/CD	19%	18%	26%	23%	24%	20%	29%	25%
Associate Degree in Other Field	4%	3%	5%	6%	8%	8%	5%	4%
High School + Any College Courses	13%	10%	32%	35%	40%	40%	44%	33%
High School Only**	<1%	<1%	2%	4%	10%	12%	5%	15%
Less than High School	0%	<1%	<1%	<1%	<1%	2%	1%	<1%
<u>Educational Pursuits</u>								
Currently Taking ECE/CD Courses	9%	11%	16%	20%	20%	25%	8%	9%

2019 and 2023 surveys.

*As of May 2023, degrees in elementary education, psychology and sociology were added to the list considered in the field of ECE/CD.

** Included High School and High School plus workshop training in ECE

Teaching Staff. Similar to administrators, and as presented in Table 4, the percentage of early childhood educators holding a Bachelor’s degree or higher in the field increased among teachers (20%, +4 percentage points) and assistant teachers (9%, +5 percentage points), while the percentage of early childhood educators holding an Associate degree in the field decreased (23% compared to 26% for teachers, 20% compared to 24% for assistant teachers). The percentage who completed high school only or high school with workshops only increased among both teachers (4% in 2023, compared to 2% in 2019) and assistant teachers (12%, compared to 10%). A decrease was also

observed regarding teachers and assistant teachers holding other education credentials, such as NC EC Credential, Infant Toddler Certificate or Child Development Associate (Table 5). By contrast, the percentage of the workforce holding a Birth-K/Preschool add-on license increased for assistant teachers (2% vs 1%) while staying constant for teachers. Overall, 46.2% of teachers reported holding a degree in the field of early care and education (compared to 40.2% if new degrees had not been added) and 30.3% of assistant teachers reported holding a degree in the field of early care and education (compared to 26.4% if new degrees had not been added).

Table 5. Other Education Credential of the Early Childhood Education Workforce

Other Education Credentials	Teachers		Assistant Teachers		FCC Providers	
	2019	2023	2019	2023	2019	2023
N.C. EC Credential	74%	69%	63%	52%	84%	70%
N.C. EC Administration Credential	24%	19%	14%	11%	38%	30%
Infant/Toddler Certificate	20%	19%	16%	15%	30%	23%
Child Development Associate (CDA)	12%	9%	11%	10%	15%	22%
B-K/Preschool add-on License	12%	12%	1%	2%	3%	2%

2019 and 2023 surveys.

*As of May 2023, degrees in elementary education, psychology and sociology were added to the list considered in the field of ECE/CD.

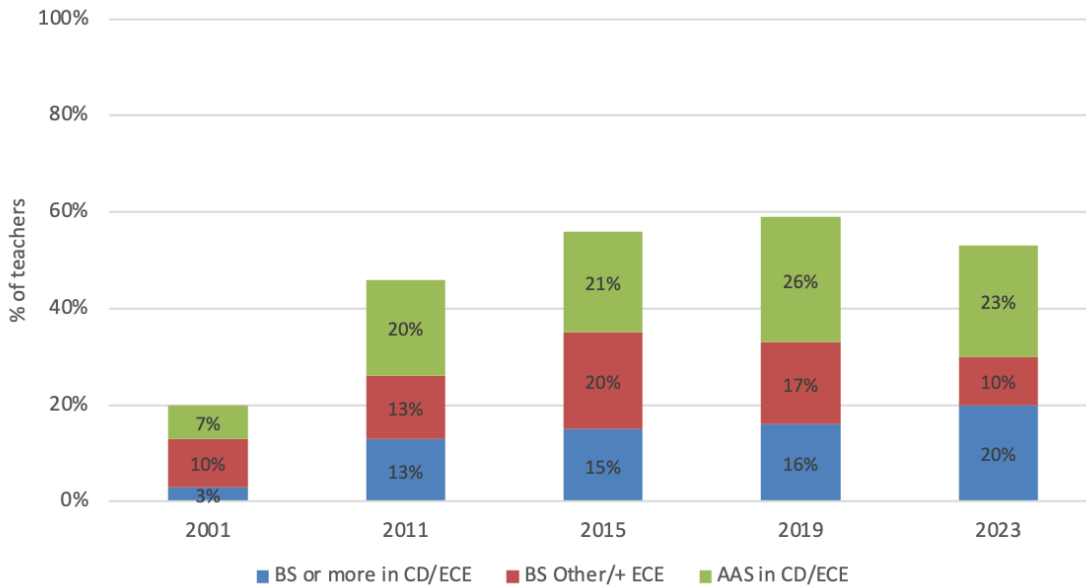
FCC Providers. A slight increase of the percentage of FCC providers holding a Bachelor’s degree or higher in the field was observed between 2019 and 2023 (10% vs 8%, Table 4). Similarly to what was observed with teaching staff, and as presented in Table 5, there was a decrease of the percentage of FCC providers holding other credentials, such as the NC EC credentials (70% vs 84%), or infant toddler certificate (23% vs 30%). However, an increase was observed regarding the percentage of FCC providers holding Child Development Associate (CDA, 22% vs 15%). Finally, 42.1% of FCC providers reported holding a degree in the field of early care and education (compared to 40.7% if new degrees had not been added)

a Bachelor’s degree or higher in CD/ECE compared to 16% in 2019. By contrast, the percentage of those with an Associate degree in child development or early childhood education decreased from 26% in 2019 to 23% in 2023. Similarly, the percentage of teachers holding a Bachelor’s degree in other fields, but courses in ECE, decreased from 17% to 10%.

Teacher Educational Gains Over Time. As shown in Figure 5, the pandemic delayed some of the efforts towards teacher growth in educational attainment. In 2023, 20% of teachers (only) held



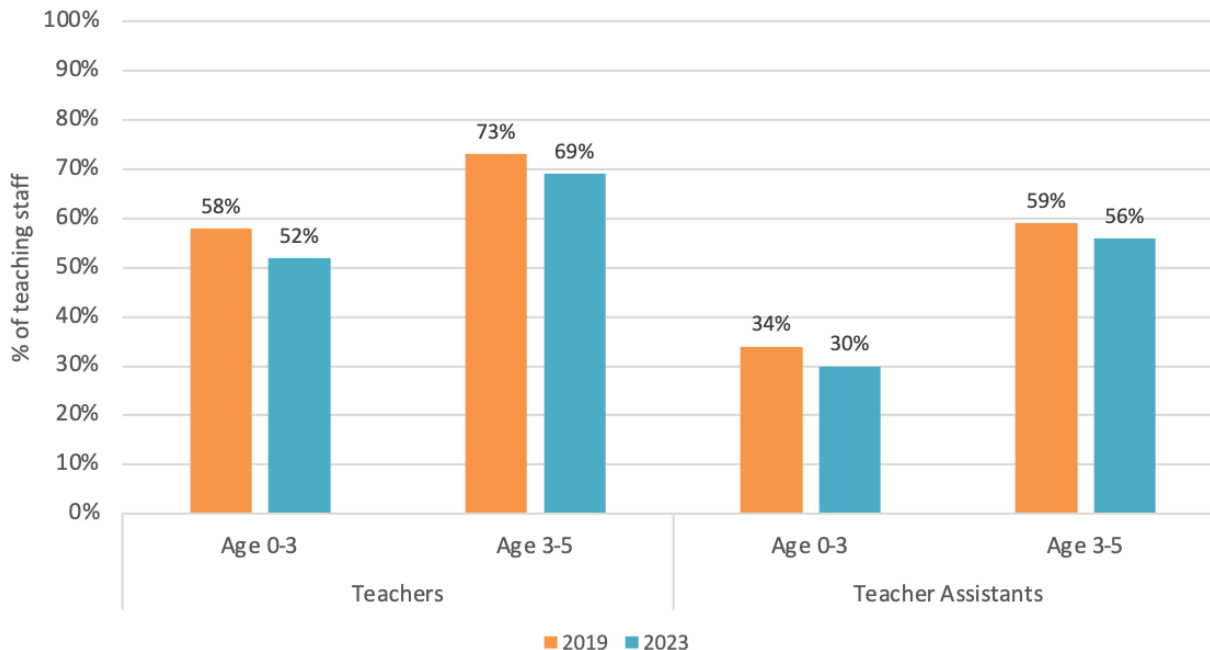
Figure 5. Teacher (only) Educational Gains Over Time



Education by Age Served. Figure 6 reports percentages of teaching staff with college degrees by age group (birth to under three vs three to five years old). Data from the 2019 ECE Workforce report is compared to the current 2023 percentages. Teaching staff with a college degree slightly decreased from 2019 to 2023 amongst both age groups taught. Indeed, 52% of teachers teaching children under three reported having a college degree compared to 58% in 2019. The percentage of

teachers with a college degree, providing care for children aged three to five, decreased from 73% in 2019 to 69% in 2023. Assistant teachers teaching ages three–five holding a college degree in 2023 was 56% compared to 59% in 2019. Finally, assistant teachers serving children under three had the lowest rates of college degrees in both years, with 30% in 2023 dropping from 34% from 2019.

Figure 6. Teaching Staff with Degree by Age Group Taught



Education by Counties. The educational levels of the ECE workforce are presented by county in Table 6. The percentage of administrators statewide with an Associate degree or higher was 89% in 2023 compared with 87% in 2019. Also, 61% of the administrators in the state had an ECE degree in 2023. The five counties with the lowest percentage of administrators who reported attainment of an Associate degree or higher were Green County (38%), Camden County (50%), Dare County (67%), Graham County (67%) and Richmond County (68%). All administrators from 27 counties reported they had an Associate degree or higher (Ashe, Avery, Bladen, Burke, Caswell, Cherokee, Chowan, Clay, Craven, Currituck, Gates, Hertford, Hyde, Jones, Martin, Mitchell, Montgomery, Pamlico, Perquimans, Polk, Scotland, Tyrrell, Warren, Watauga, Wilson, Yadkin, Yancey counties). Counties with the lowest percentage of administrators having an early child education degree include Gates, Polk and Tyrrell, where less than one percent of the administrators completing the survey reported having a degree in the field, Macon County (20%) and Davie County

(21%). Conversely, the top five counties with administrators having attained early child education degrees were Lenoir County (96%), Brunswick, Camden, Hyde, Madison and Martin County (all administrators surveyed reported having a degree in the field).

Statewide, 57% of teaching staff reported holding an Associate degree or higher compared to 62% in 2019. However, four counties (Currituck, Pamlico, Tyrrell and Warren) had all teaching staff surveyed reporting an Associate degree or higher. In addition, 42% of teaching staff reported holding an early childhood education degree, compared to 40% in 2019. The five counties with the lowest percentage of teaching staff completing an ECE degree were Camden (14%), Craven (23%), Onslow (24%), Lincoln (25%) and Swain (25%). On the other hand, the counties with the highest percentage of teaching staff with early child education degrees include Bladen County (77%), Warren County (86%), Hertford County (87%), Currituck County (88%) and Montgomery County (89%).

Table 6. Education Levels of ECE Workforce by County

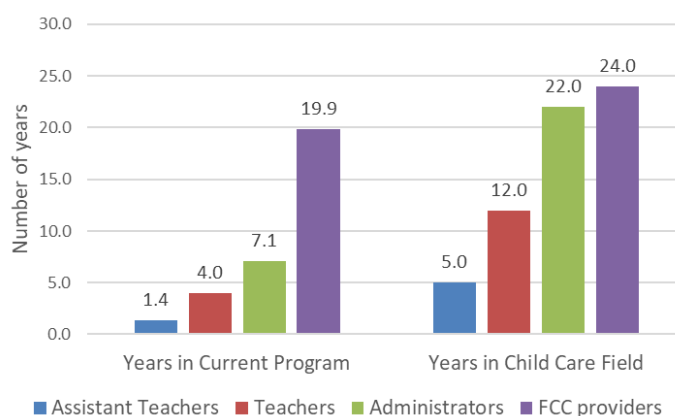
Directors				Teaching Staff			
Associate Degree or Higher		ECE Degree		Associate Degree or Higher		ECE Degree	
Statewide	89%	Statewide	61%	Statewide	57%	Statewide	42%
Counties with lowest education levels							
Greene	38%	Gates	Less than 1 %	Anson	31%	Camden	14%
Camden	50%	Polk	Less than 1 %	Avery	35%	Craven	23%
Graham	67%	Tyrrell	Less than 1 %	Caswell	37%	Onslow	24%
Dare	67%	Macon	20%	Camden	38%	Lincoln	25%
Richmond	68%	Davie	21%	Lincoln	40%	Swain	25%
Counties with highest education levels							
		Lenoir	96%	Bertie	90%	Bertie	77%
		Brunswick	Over 99%	Hertford	90%	Bladen	77%
Counties with over 99%: Ashe, Avery, Bladen, Burke, Caswell, Cherokee, Chowan, Clay, Craven, Currituck, Gates, Hertford, Hyde, Jones, Martin, Mitchell, Montgomery, Pamlico, Perquimans, Polk, Scotland, Tyrrell, Warren, Watauga, Wilson, Yadkin, Yancey		Camden	Over 99%	Currituck	Over 99%	Warren	86%
		Hyde	Over 99%	Pamlico	Over 99%	Hertford	87%
		Madison	Over 99%	Tyrrell	Over 99%	Currituck	88%
		Martin	Over 99%	Warren	Over 99%	Montgomery	89%

Working Experiences in the Field

The ECE workforce’s length of time in the child care field and in their current programs is presented in Figure 7. Median length of experience in the field was 5.0 years for assistant teachers, 12.0 years for teachers, 22.0 years for administrators, and 24.0 years for FCC providers. Teaching staff’s median years in their current program was 4.0 years and assistant teachers’ length of time in their current center comes in at just over a year (1.4 years). Administrators’ median years in their position in their current center was 7.1 years. Expectedly, FCC providers showed the longest longevity in a singular program with a median length of 19.9 years.

Working Experiences by Counties. Table 7 displays the workforce working experience years by county. Statewide, administrators in 2023 reported a median tenure of 7.2 years in their program and 22.0 years of being in the field in general. This is an increase from 2019 as that year’s statewide figures were 6.4 years in the current program and 20.0 years in the field overall. Wilkes County and Tyrrell County administrators reported the shortest time in the program in 2023 with 0.2 years. Counties with administrators reporting the longest experience in the current program were topped by Scotland County and Martin County with nearly 24 years. The two counties with the administrators who had the most years in the

Figure 7. Early Care and Education Workforce Experience



field of early child education were Gates County (32.3 years) and Martin County (30.0 years). By comparison, teaching staff statewide had a median of three years of experience in their current program and ten years in the field overall. The teaching staff in Watauga County had the fewest years of experience in their program at 1.2 years while teaching staff in Clay County had the fewest years in the field overall at 3.3 years. The three counties with the highest number of years of teaching staff experience in their programs in 2023 were Bertie County (11.5 years), Green County (10.3 years) and Northampton County (10.0 years). The three counties with teaching staff having the most experience in the field were Warren County at 26.0 years, Northampton County at 23.0 years and Tyrrell County at 22.2 years.

Table 7. ECE Workforce Experience by County

Administrators				Teaching Staff			
Years in Program		Years in Field		Years in Program		Years in Field	
Statewide	7.2	Statewide	22.0	Statewide	3.0	Statewide	10.0
Counties with lowest experience							
Wilkes	0.2	Jones	7.0	Watauga	1.2	Clay	3.3
Tyrrell	0.2	Tyrrell	9.6	Richmond	1.3	Watauga	4.3
Warren	1.0	Sampson	11.4	Clay	1.4	McDowell	4.5
Mitchell	1.6	Currituck	12.2	Beaufort	1.5	Jackson	5.0
Jones	2.0	Macon	13.0	Onslow	1.5	Pasquotank	5.6
Counties with highest experience							
Davie	20.0	Wilson	27.3	Bladen	9.0	Washington	21.5
Polk	20.0	Alexander	28.8	Mitchell	9.5	Bertie	22.0
Greene	20.1	Hertford	29.0	Northampton	10.0	Tyrrell	22.2
Martin	23.6	Martin	30.0	Greene	10.3	Northampton	23.0
Scotland	23.6	Gates	32.3	Bertie	11.5	Warren	26.0

Compensation

Center administrators reported compensation scales for center teaching staff (i.e., teachers and assistant teachers) that included starting wages and limits on the highest wages paid to teaching staff, as well as administrator salary. FCC providers' monthly earnings come from a varying mix of child care tuition fees paid by parents, subsidy payments and Child and Adult Care Food Program (CACFP) reimbursements. Their expenditures include items such as food, toys, substitute care, advertising, training fees, diapers, crafts, transportation, supplies, field trips, cleaning supplies, and gifts for the children.^{xvii}

Teaching Staff Wage Ranges and Administrator Wage Reported by Administrators

Administrators were invited to report a range of teaching staff

hourly wages (wages for starting teacher, as well as highest wages for teacher, wages for starting assistant teacher and highest wages for assistant teacher), as well as their own salary. Out of those data were calculated several median: starting and highest median hourly wages for teachers and assistant teachers, and overall median hourly wage for administrators.

As presented in Table 8, starting and highest median hourly wages for teachers were \$14.00 per hour and \$17.00 per hour respectively in 2023 across all programs statewide, as reported by administrators. The starting assistant teacher median hourly wage was \$12.01 per hour in 2023 and the highest median wage for assistant teachers was \$15.00 per hour. Administrators also self-reported their overall wage. The actual median wage for administrators was \$21.63 per hour.

Table 8. Teaching Staff Median Hourly Wage Ranges and Administrator Hourly Median Wages by Program Characteristics

		Wage Ranges				Self-Reported Wage
		Starting Teacher Wage	Highest Teacher Wage	Starting Asst Wage	Highest Asst Wage	Administrator
Statewide	All Programs	\$14.00	\$17.00	\$12.01	\$15.00	\$21.63
Type of Organization	For-Profit	\$13.00	\$16.00	\$12.00	\$13.00	\$20.00
	Not-For-Profit	\$13.00	\$16.00	\$11.00	\$13.00	\$20.19
	Public	\$21.51	\$38.30	\$15.00	\$27.31	\$31.25
Sponsoring Agency	For-Profit, Single Site	\$12.55	\$15.00	\$11.00	\$13.00	\$20.00
	For-Profit, Multi-Site	\$14.00	\$17.00	\$12.00	\$14.00	\$22.90
	Not-For-Profit, Community Board	\$14.03	\$17.00	\$12.00	\$14.00	\$22.00
	Not-For Profit, Faith-Based	\$12.00	\$15.00	\$11.00	\$13.00	\$20.00
	Head Start Programs	\$14.40	\$18.50	\$13.00	\$15.00	\$23.00
	Public Schools	\$21.51	\$38.30	\$15.00	\$27.31	\$39.45
	Other Public	\$18.20	\$19.42	\$14.00	\$14.00	\$28.00
Location	Urban	\$15.00	\$18.00	\$13.00	\$15.00	\$24.00
	Suburban	\$13.00	\$17.00	\$12.00	\$14.22	\$21.63
	Rural	\$12.50	\$16.00	\$11.83	\$13.93	\$19.23
Star Rating	Under Three Stars	\$12.00	\$15.00	\$11.00	\$13.00	\$19.00
	Four Stars	\$12.50	\$15.00	\$11.00	\$13.00	\$20.00
	Five Stars	\$15.87	\$20.00	\$14.00	\$16.00	\$24.04

2023 Administrator surveys

*Administrator median salaries are actual median salaries, not median starting/highest salaries

Center Wages & Type of Organization and Sponsoring Agency.

Table 8 also presents teaching staff hourly wage scales and administrator hourly wages by type of organization and sponsoring agency.

Public organizations paid higher median wages than not-for-profit and for-profit programs. The starting median teacher wage for public programs was \$21.51 per hour compared to \$13.00 per hour for both not-for-profit and for-profit organizations. The highest median teacher wage was \$38.30 per hour for public organizations while it was \$16.00 per hour for both for-profits and not-for-profit groups. Public programs reported a median starting assistant teacher wage of \$15.00 per hour, whereas for-profits and not-for-profits paid lower wages at \$12.00 per hour and \$11.00 per hour respectively. The highest assistant teacher wage for public programs was \$27.31 per hour and it was \$13.00 per hour for both not-for-profit and for-profit programs. Director self-reported overall median wages for not-for-profit programs and for-profit programs were almost equal (\$20.19 per hour and \$20.00 per hour respectively), while public organizations paid a much higher median director wage of \$31.25 per hour.

For-profit sponsoring agencies include single site as well as multi-site programs. Larger for-profit programs with multi-sites had higher median wages than for-profit single site programs. Not-for-profit sponsoring agencies include programs run by a community board or faith-based programs. Not-for-profit programs run by community boards paid teachers and teacher assistants more per hour than faith-based programs (e.g., \$14.03 per hour versus \$12.00 for starting teacher median wage, \$17.00 per hour versus \$15.00 per hour for highest teacher median wage). Public sector programs include Head Start, public schools and other public programs. Out of all types of organizations statewide, 2023 wages were the highest for public programs across all positions, with public schools being the highest paid providers (with a range of \$21.51 per hour for starting teachers to \$38.30 per hour for highest teachers and \$15.00 per hour for starting teacher assistants to \$27.31 per hour for highest teacher assistants). As self-reported by administrators, not-for-profit programs run by community

boards also paid administrators more per hour than faith-based programs (\$22.00 per hour versus \$20.00 per hour for administrator wage). Self-reported administrator median wage was the highest in public schools (\$39.45 per hour).

Center Wages & Location. The urban median wage for starting teachers was \$15.00 per hour while more experienced teachers received \$18.00 per hour (Table 8). Whereas suburban and rural teachers were close in median starting and highest wages, they fell behind urban wages. Teacher assistants' both starting and highest median wages in rural and suburban areas were below wages from urban areas. Between 2019 and 2023, the greatest increase in median teacher wages was for urban starting teachers with a raise from \$11.75 per hour to \$15.00 per hour. The self-reported administrator median wage was the highest in urban locations (\$24.00 per hour). Increases in median administrator wages across location was approximately \$2.00 per hour more in 2023 than in 2019.

Center Wages & Star Rating. With regard to programs' star rating, 5-star programs, across the state, had higher median wage ranges for ECE staff in 2023 (Table 8). Starting median wages in 5-star programs was \$15.87 per hour for teachers and \$14.00 per hour for assistant teachers. The highest median wages were \$20.00 per hour for teachers and \$16.00 per hour for assistant teachers. Starting teacher median wages were \$12.50 per hour in 4-star centers and \$12.00 per hour in centers 3-star and under. Wages for more experienced educators were \$15.00 per hour in both 3-star and 4-star centers. Starting assistant teacher median wages in 4-star centers and centers 3-star and under were both \$11.00 per hour, while wages for more experienced assistant teachers were \$13.00 per hour. Finally, the self-reported administrator median wage for programs with no stars through 3-stars was \$19.00 per hour while it was \$20.00 per hour for 4-star centers, and \$24.04 for 5-star centers.

Center Wages & Buying Power. Previous workforce studies conducted in the past by CCSA reported that wages were keeping pace with the cost of living. The pandemic stopped such trends for some experienced ECE professionals. Table 9 presents a comparison of median hourly wage ranges between 2019 and 2023, counting for inflation. The median starting wage statewide was \$14.00 per hour for teachers, and \$12.02 per

hour for assistant teachers, representing an increase in buying power of 12% for starting teachers and 1% for assistant teachers. However, the median highest hourly wage was \$17.00 per hour for teachers and \$15.00 per hour for assistant teachers, representing a decrease of buying power of about 5% for teachers and an increase of 5% for assistant teachers.

Table 9. Median Hourly Wages in Centers Statewide and by NC Pre-K Classroom Designation

		2019 Starting Wage	2019 Wage in 2023 Dollars	2023 Starting Wage	Percent Change 2019-2023
All Centers	Starting Teacher Wage	\$10.50	\$12.52	\$14.00	12%
	Highest Teacher Wage	\$15.00	\$17.87	\$17.00	-5%
	Starting Assistant Teacher Wage	\$10.00	\$11.91	\$12.02	1%
	Highest Assistant Teacher Wage	\$12.00	\$14.30	\$15.00	5%
Centers with NC Pre-K classrooms	Starting Teacher Wage	\$20.19	\$24.06	\$21.51	-11%
	Highest Teacher Wage	\$36.60	\$43.61	\$38.30	-12%
	Starting Assistant Teacher Wage	\$12.13	\$14.45	\$15.00	4%
	Highest Assistant Teacher Wage	\$19.26	\$22.95	\$27.31	19%
Centers without NC Pre-K classrooms	Starting Teacher Wage	\$10.00	\$11.91	\$13.00	9%
	Highest Teacher Wage	\$13.00	\$15.49	\$16.00	3%
	Starting Assistant Teacher Wage	\$9.00	\$10.72	\$12.00	12%
	Highest Assistant Teacher Wage	\$11.00	\$13.11	\$13.00	-1%

2019 & 2023 Administrator surveys
https://www.bls.gov/data/inflation_calculator.htm



Center Wages & Presence of NC Pre-K Classrooms. Table 9 also presents a comparison of teaching staff wages between centers with or without NC Pre-K classrooms. The wage ranges reported by administrators of centers with NC Pre-K classrooms were higher than those in centers without NC Pre-K classrooms.

The median starting teacher hourly wage for centers with NC Pre-K classrooms was \$21.51 per hour in 2023 while the median highest teacher hourly wage for centers with NC Pre-K classrooms was \$38.30. The starting median assistant teacher wage increased from \$12.13 per hour to \$15.00 per hour between 2019 and 2023. The highest assistant teacher wage increased from \$19.26 per hour in 2019 to \$27.31 per hour in 2023. In other words, the buying power of NC Pre-K assistant teacher wages was higher than in 2019 but was lower for NC Pre-K teachers.

Median hourly wages for teachers at centers without NC Pre-K classrooms showed similar trends as the median hourly wages for all centers reported through administrator surveys. Starting median hourly teacher wages increased from \$10.00 in 2019 to \$13.00 in 2023. Highest teacher wages increased from \$13.00 per hour in 2019 to \$16.00 per hour in 2023. For assistant

teachers, the reported median hourly starting wage increased from \$9 in 2019 to \$12.00 in 2023. The highest assistant teacher wage rose from \$11.00 per hour in 2019 to \$13.00 per hour in 2023.

ECE Professionals Self-Reported Wages

In addition to wage ranges data provided by administrators, wage data were collected from teaching staff and FCC surveys, who self-reported their wages as well.

Center and FCC Homes Earning Percentiles. Table 10 presents self-reported earnings of the ECE workforce. In 2019 ECE teachers had a median wage of \$14.35 per hour in 2023 dollars.^{xviii} The median wage for these teachers in 2023 is slightly higher at \$15.00 per hour, a 4.5% percent increase. On the contrary, for assistant teachers the median wage in 2023 remained similar to 2019. Teachers and teacher assistants in the 90th percentile of reported wages saw a decrease, -9.6% and -1.3% respectively, from their 2019 wage in 2023 dollars. Assistant teachers in the 10th percentile of wages reported an increase of 3.8% in wages from \$9.63 per hour to \$10.00 per hour in 2023.

Table 10. Self-Reported Earnings of the Early Care and Education Workforce

	2019* Wage in 2023 Dollars	2023 Wage	Percent Change 2019* - 2023
90 th Percentile Wage: Teacher	\$22.13	\$20.00	-9.6%
50 th Percentile Wage: Teacher	\$14.35	\$15.00	4.5%
10 th Percentile Wage: Teacher	\$10.72	\$10.50	-2.1%
90 th Percentile Wage: Teacher Assistant	\$17.23	\$17.00	-1.3%
50 th Percentile Wage: Teacher Assistant	\$13.11	\$13.00	-0.8%
10 th Percentile Wage: Teacher Assistant	\$9.63	\$10.00	3.8%
90 th Percentile Wage: Administrator	\$38.95	\$33.75	-13.4%
50 th Percentile Wage: Administrator	\$22.91	\$21.63	-5.6%
10 th Percentile Wage: Administrator	\$14.14	\$14.00	-1.0%
90 th Percentile Wage: FCC Provider	\$18.74	\$17.90	-4.5%
50 th Percentile Wage: FCC Provider	\$10.83	\$10.20	-5.8%
10 th Percentile Wage: FCC Provider	\$3.51	\$2.58	-26.5%

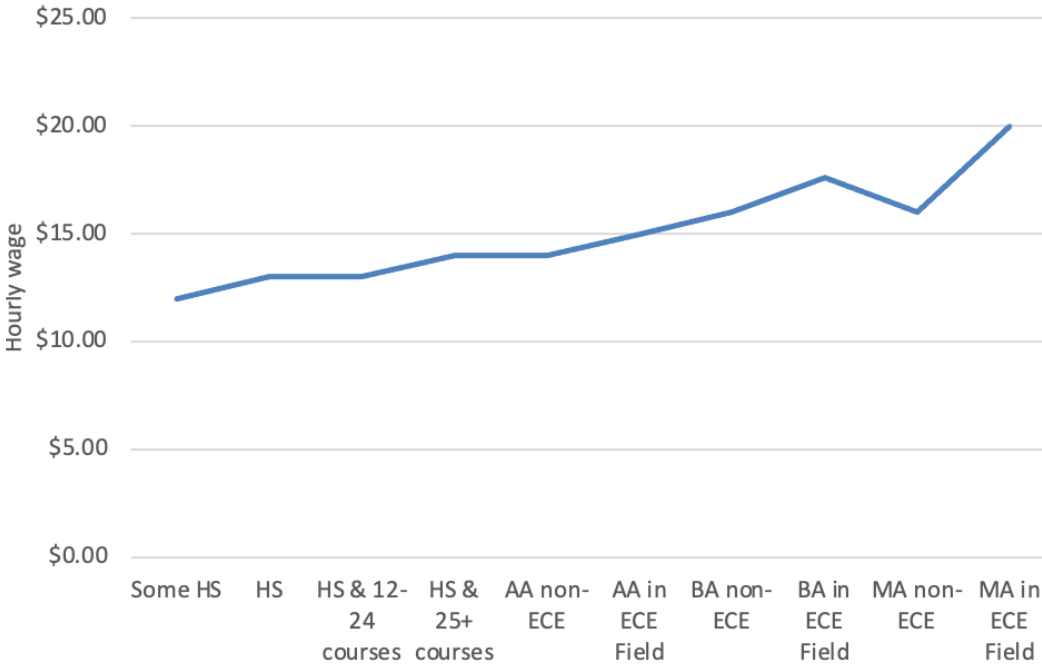
Source: 2019 and 2023 Administrator, Teaching Staff and FCC Provider Surveys
https://www.bls.gov/data/inflation_calculator.htm

Unlike teachers and teacher assistants, administrators experienced a decrease in reported earnings, in each percentile, in 2023 from 2019 levels. The 90th percentile administrator wage for 2023 was \$33.75 per hour, down a significant 13.4% from the 2019 wage in 2023 dollars (\$38.95). The median administrator wage and 10th percentile wage declined as well, -5.6% and -1% respectively. It is worth noticing that the center director median salary, just below \$22.00 per hour, falls far short of the base salary for public school principals (\$31.25 per hour).

A decrease was also observed in the self-reported earnings of FCC providers, already very low. FCC providers at the 90th percentile wage reported a decrease of 4.5% from 2019 wages in 2023 dollars to \$17.90 per hour. At the 50th percentile of reported wages, FCC providers were paid \$10.20 in 2023. The lowest paid FCC providers experienced a -26.5% change in 2023 wages from 2019 levels, earning \$2.58 per hour for their ECE work.

Wages & Education Level. As presented in Figure 8, ECE teachers earned, overall, more as they increased their level of education. In addition, those who hold ECE-related degrees earned more in the field in comparison with those who graduated with non-ECE related degrees. Teachers with a high school diploma and some course work earned \$1.00 per hour more than those with a diploma and no course work (\$13.00 per hour with high school diploma to \$14.00 per hour for diploma and 25+ courses). Teachers with a Bachelor’s degree in the ECE field earned close to \$2.00 per hour more than their counterparts with a Bachelor’s degree in a non-related field (\$17.60 per hour versus \$16.00 per hour). Those with a Master’s in the ECE field earned a median of \$20.00 per hour. Teachers with an Associate degree in the field earned \$1.00 per hour than teachers with an Associate degree in another field.

Figure 8. Median Hourly Wage of Teachers (only) by Level of Education



For assistant teachers, a clear pattern of wage progression was difficult to ascertain specifically among the higher education levels. However, for assistant teachers, a significant difference in salary could be found between those who had any type or level of degree and those who did not. Assistant teachers with no degree had a median of \$12.00 per hour while their counterparts with a degree of any type or any level had a median of \$14.56 per hour.

Similar to assistant teachers, educational attainment is not as clearly linked to income for FCC providers as with teachers. When grouped into just two categories, earnings do tend to rise for FCC providers holding a college degree. FCC providers without a degree earn a median of \$9.41 per hour but those with a degree earn \$10.47 per hour. No consistent pattern of earning differences emerged for other levels of education.

Center Wages & Age Served. Teaching three- to five-year-olds proved to be financially beneficial for educators. Teaching staff who taught three- to five-year-olds could expect approximately \$1.00 per hour higher wages over teaching staff who taught infants and/or toddlers. For teachers and lead teachers, those who taught infants and/or toddlers had a median salary of \$14.00 per hour. Those teachers who taught preschool children fared better with a median salary of \$15.00 per hour. The same held true for assistant teachers of infants and/or toddlers who made \$12.50 per hour compared to their preschool counterparts who made \$14.00 per hour. Many teachers and assistant teachers indicated that they taught multiple age groups spanning across infant and/or toddlers and preschoolers. These teachers and assistants were counted in both age groups.

Center Wages & Counties. Table 11 shows the counties with the highest and lowest median wages for administrators and teaching staff in 2023. The median hourly wage for administrators was \$21.63 statewide, an increase of \$2.40 per hour from 2019. Camden County had the lowest reported median wage for administrators in 2023 at \$11.00 per hour followed by Martin County (\$11.05) and Pamlico County (\$11.18).

Wilkes County reported the highest median administrator wages at \$46.61 per hour. Other 2023 counties with highest median administrator wages included Yadkin County (\$34.62), Davie County (\$32.25) and Burke County (\$30.00).

The statewide wage for teaching staff was \$14.42 per hour, a \$2.42 increase from 2019. The two lowest wages were reported for Washington County and Anson County, \$8.24 per hour and \$9.30 per hour respectively. The counties with the four highest reported teaching staff wages in 2023 were Currituck County at \$23.13, Hyde County at \$18.07, Tyrrell County at \$17.02 and Buncombe County at \$17.00.

Table 11. ECE Wages by County

Administrators		Teaching Staff	
Statewide	\$21.63	Statewide	\$14.42
Counties with lowest ECE wages			
Camden	\$11.00	Washington	\$8.24
Martin	\$11.05	Anson	\$9.30
Pamlico	\$11.18	Bladen	\$10.00
Anson	\$12.00	Martin	\$10.00
Bertie	\$12.00	Perquimans	\$10.00
Counties with highest ECE wages			
Buncombe	\$26.68	Durham	\$16.71
Burke	\$30.00	Buncombe	\$17.00
Davie	\$32.25	Tyrrell	\$17.02
Yadkin	\$34.62	Hyde	\$18.07
Wilkes	\$46.61	Currituck	\$23.13

2023 Administrator and Teaching Staff Surveys

FCC Homes Wages & Geographical Region. Because FCC providers reported working long hours each week (median of 55 hours each week statewide) often with little or no help, and because of the expenses inherent to running a child care business, FCC providers often make low wages (\$10.19 statewide). This hourly wage varies for FCC providers based on geographic areas. While those FCC providers in urban areas reported an hourly rate of \$10.19 per hour, FCC providers in suburban areas reported an hourly rate of \$10.78 per hour. Rural FCC providers made just \$10.00 per hour.

Benefits

Table 12 shows a comparison of employment benefits offered by North Carolina ECE centers between 2019 and 2023. In 2023, 17% of ECE centers offered fully paid health insurance compared to 15% in 2019. The percentage of centers that offered partially paid health insurance was roughly the same between the two years. About 17% of programs offered free child care in 2023, an increase of seven percentage points compared to 2019. Fewer ECE centers offered disability insurance, parental leave and reduced child care fees. Retirement benefits offered by centers in the state were similar between 2019 and 2023 (43%). The majority of ECE centers in the state reported that they offer paid sick leave, paid vacation and paid holidays. The percentage of centers offering these benefits between 2019 and 2023 remained fairly consistent.

Table 12. Employment Benefits in ECE Centers

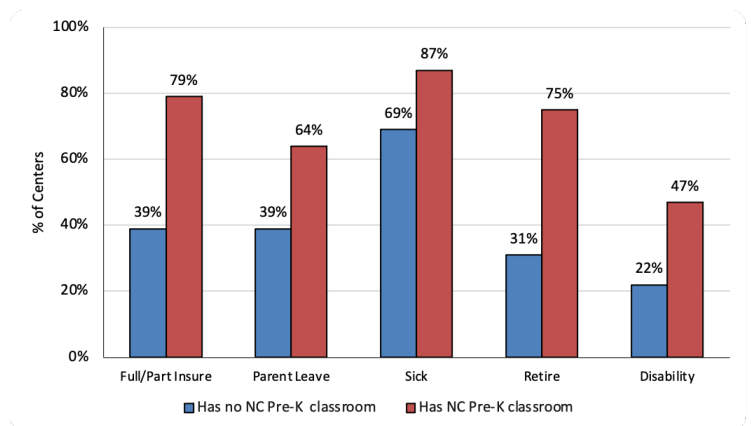
	2019	2023
Fully Paid Health Insurance	15%	17%
Partially Paid Health Insurance	33%	32%
Free Child Care	10%	17%
Disability Insurance	32%	29%
Parental Leave	64%	46%
Reduced Child Care Fee	57%	55%
Retirement Benefits	43%	43%
Paid Sick Leave	71%	71%
Paid Vacation	87%	88%
Paid Holidays	93%	94%

2019 & 2023 Administrator surveys

FCC providers usually worked alone or with the help of an unpaid or underpaid family member, and less often have established policies regarding paid benefits. Hence, they often receive less paid benefits than ECE center staff. Child care tuition covered providers' vacation time in 65% of homes and 55% of FCC providers charged for days when they were sick. These measures help identify the extent to which providers run their child care programs using a business model designed to meet providers' personal and professional needs.

Benefits & Presence of NC Pre-K Classroom. As presented in Figure 9, more teaching staff from centers with NC Pre-K classrooms had benefits such as insurance, parental leave, retirement and disability. In fact, more than twice of centers with an NC Pre-K classroom offer retirement (75%) and disability (47%) compared to programs without an NC Pre-K classroom (31% offer retirement and 22% offer disability insurance).

Figure 9. Benefits in Centers With and Without NC Pre-K Classrooms



Benefits & Auspices. Table 13 shows health insurance offered by auspice. In 2023, the majority of public-funded programs provided partly or fully paid health insurance (over 90%). Private not-for-profit centers run by community boards saw a four percentage points decrease from 2019 to 2023 in the number of its centers that offered partly or fully paid health insurance (50%). Private for-profit multi-centers reported an eight percentage point increase from 2019 to 2023 in the number of centers (55%) that offered the benefit. Private for-profit single centers also reported a significant increase from 2019 (18%) to 2023 (32%) of its centers that provided partly or fully paid health insurance. Private not-for-profit faith-based centers offering health insurance increased from 29% in 2019 to 35% in 2023.

Table 13. Health Insurance by Auspice

Type of Center	Partly or Fully Paid Health Insurance
Private For-Profit (single center)	32%
Private Not-For-Profit (faith community)	35%
Private For-Profit (multi-center)	55%
Private Not-For-Profit (comm./board sponsored)	50%
Public Program	89%
Public Head Start	93%
Public School	97%

2023 Administrator surveys



Table 14. Individual Economic Well-being of Child Care Providers

	Administrators	FCC Providers	Teachers	Assistant Teachers
Median Hourly Earnings	\$21.63	\$10.19	\$15.00	\$13.00
“Single Parent” with Child 0-18	15%	22%	32%	25%
Public Assistance Usage Past 3 Years	No data	35%	42%	42%
No Health Insurance, 2023	No data	12%	15%	12%

2023 surveys

Economic Well-being

Many people working in the early childhood field face severe economic challenges that affect their families and them personally. Table 14 reports the median economic wellbeing of early child education providers.

Median hourly earnings for administrators in 2023 was reported at \$21.63, and 15% of administrators identified as “single parents” (i.e., having sole responsibility for the care/support of their children) with children birth to 18 years old.

FCC providers reported median hourly earnings of \$10.19, which is \$1.10 more than what was reported in 2019. The percentage of FCC providers who are “single parents” with children birth to 18 years old was 22%. Also, the percentage of FCC providers who had no health insurance decreased from 16% to 12% in

2023. Due to their low wages, many FCC providers are forced to rely on public assistance (e.g., Medicaid, SNAP, TANF, child care subsidy). The percentage of FCC providers who used public assistance in the past three years was 35%.

Teachers and assistant teachers also had higher median hourly earnings in 2023 at \$15.00 and \$13.00 per hour respectively. The percentage of “single parent” teachers and assistant teachers with children birth to 18 years old increased significantly from 2019. A total of 32% of teachers and 25% of assistant teachers identified as “single parents” with children ages birth to 18.

Data from 2023 surveys also showed that the percentage of teachers with no health insurance was 15% and 12% for assistant teachers. These amounts were lower than what was reported in 2019 for teachers (22%) and assistant teachers (20%), i.e. more teaching staff had health insurance.



Turnover Rate and Reasons to Stay in the Field

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

Table 15 shows that the workforce turnover of full-time teachers and assistant teachers in the state rose from 21% in 2019 to

38% in 2023. Looking further, 22% of all teachers (full time and part time) reported they would leave the field in the next three years, which is greater than the percentage reported in 2019 (19%). For assistant teachers, 2023 surveys showed that 26% reported that they would leave the field in the next three years, compared to 22% in 2019. The percentage of infant/toddler and preschool teaching staff that reported leaving the field was 25% and 22% respectively. This is an increase of three percentage points from 2019. Data from administrator surveys indicated that in 2023, 17% of administrators considered leaving the field in the next three years. In 2019, approximately 8% of administrators reported that they definitely or probably would leave the field in the next three years. Table 15 also shows that in 2023, 20% of FCC providers considered leaving the field in the next three years compared to 14% in 2019.

Table 15. ECE Workforce Turnover

Statewide Separation Rates	2019	2023
Full-time Teachers and Assistant Teachers	21%	38%
Full-time Teachers	22%	39%
Full-time Assistant Teachers	18%	33%
Teachers Leaving the Field in 3 years	19%	22%
Assistant Teachers Leaving the Field in 3 years	22%	26%
Infant/Toddler Teaching Staff Leaving the Field in 3 Years	22%	25%
Preschool Teaching Staff Leaving the Field in 3 Years	19%	22%
Administrators Leaving the Field in 3 Years	8%	17%
Family Child Care Providers Leaving the Field in 3 Years*	14%	20%

2019 & 2023 FCC, Administrator and Teaching Staff surveys



The top three factors that would motivate administrators to stay in the field were the opportunity to find qualified teachers (67%), more respect for the profession (57%) and more pay (55%) (Table 16). Other major components administrators indicated might keep them in the field were having more benefits (42%), fewer money problems for centers (35%), more administrative help (31%) and finding substitutes (44%). Overall, 36% of

administrators expressed their decision to leave the field due to retirement.

The top three factors that would motivate FCC providers to stay in the field would be to earn more money (47%), have more time off (36%) and assistance with finding and/or availability of substitutes (27%). Other factors that would appeal to administrators and FCC providers can be found in Table 16.

Table 16. Factors Motivating Administrators and FCC Providers to Stay in the Field

Administrators		Family Child Care Providers	
Motivator	2023	Motivator	2023
Finding qualified teachers	67%	Earn more money	47%
More respect for the profession	57%	More time off	36%
More pay	55%	Find substitutes	27%
Finding substitutes	44%	More respect for the profession	22%
More benefits	42%	Receive training	10%
Fewer money problems for center	35%	Help working with children with challenging behaviors	8%
More administrative help	31%	Meet others (FCC providers)	5%
Opportunity to network	28%	Help working with children with special needs	3%
Working fewer hours	28%	Nothing, because retiring	31%
Better working conditions	21%		
Professional growth opportunities	16%		
Nothing, because retiring	36%		

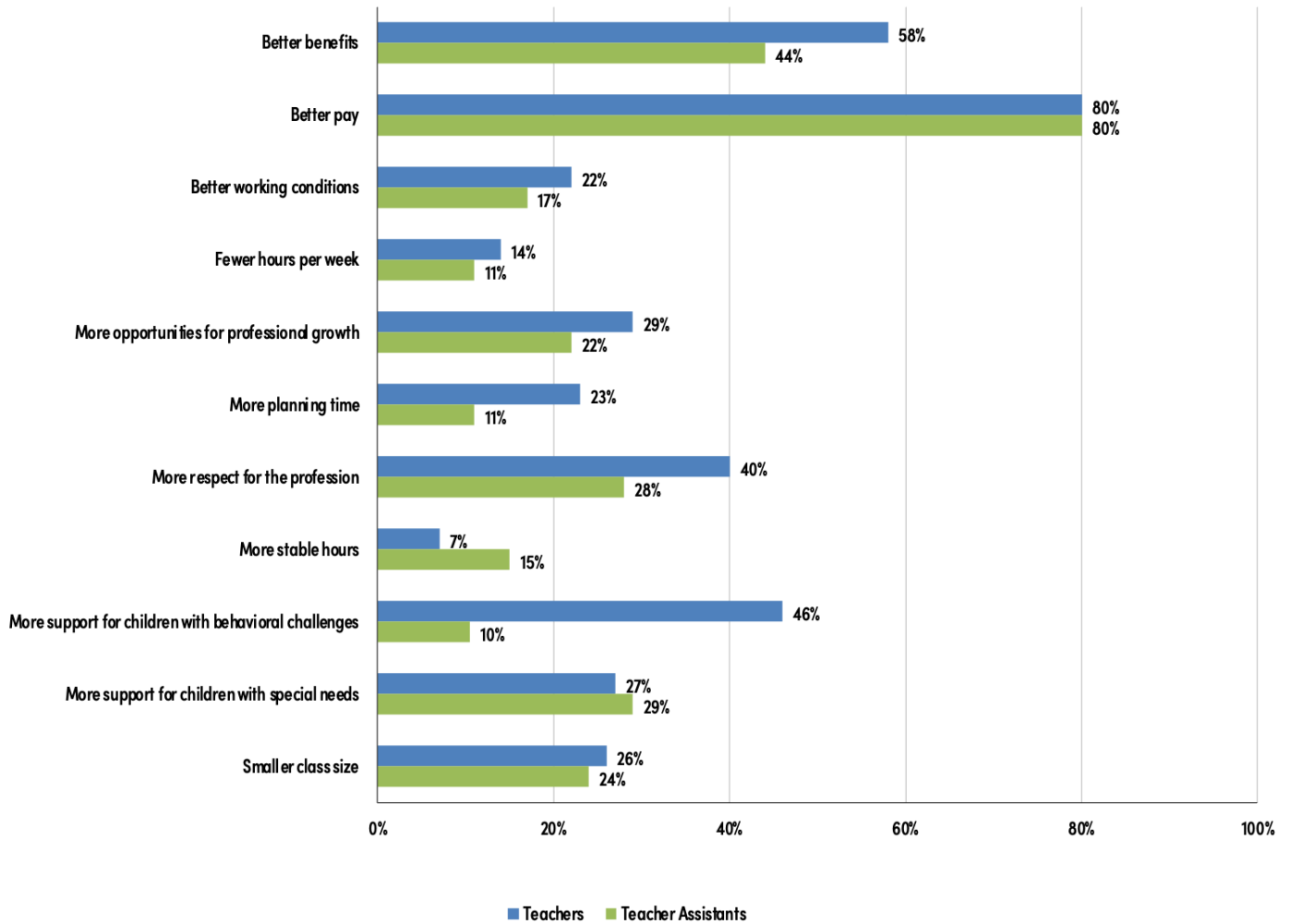
2023 Administrator and FCC surveys



As presented in Figure 10, 80% of teachers and teacher assistants cited better pay as a factor that would motivate them to stay in the field. This percentage remained similar to previous data collected in the 2019 report. The second highest

motivator was more benefits for both teachers and assistant teachers. Other factors important for teaching staff included more respect for the profession and more support for children with special needs.

Figure 10. Factors Motivating Teaching Staff to Stay in the Field



Effect of the Pandemic

Administrator, teaching staff and FCC provider surveys also included a few questions on the effect of the pandemic on their daily life. In addition, participants in interviews and focus groups were invited to reflect on the two or three most significant ways the pandemic changed their daily work as professionals in ECE.

Effect of the Pandemic on Programs and Their Workforce

The most common impact on centers discussed in focus groups and interviews was the loss of staff and the difficulty in finding and hiring qualified early childhood professionals, leading to an increased workload and caregivers being mentally and physically exhausted. The closing and reopening of centers posed problems for enrollment, consistency of educational curriculum as well as financial health of child care businesses and administrators' ability to retain staff. In spite of these challenges, child care providers have still been expected to meet state requirements on licensing and keeping educated, qualified staff on hand.

Most of my teachers that are here, they're very passionate about what they do and they are going to put themselves, how they're feeling, their own health, on the back burner to be in their classrooms and take care of their children. Administrator, Urban, 5-star

We had to close one classroom down and we had siblings in those classrooms and they had to go to other daycares because we couldn't find teachers . . . We ended up closing one classroom permanently. Administrator, Rural, 4-star

Overall, teaching staff and administrators noticed high turnover, being short-staffed, staff burnout and no-shows from prospective employees throughout the pandemic. They noted higher pay in other industries, namely retail, lack of benefits,

low return and exposure to illness during COVID-19 with little protection as some potential reasons for people leaving the field. By contrast, a few professionals mentioned no change in turnover rate, noting they were already high pre-COVID-19.

They would just ghost us . . . knowing that people [were] saying, well, no one's hiring, you know. They wouldn't answer the phone, they wouldn't reply to emails. Administrator, Rural, GS-110

I would rather stay home or go to work at McDonalds or Walmart or Chick-fil-a where I'm gonna get better benefits, [better] hours. FCC Provider, Urban, Temporary



Administrators noted that while retention was a concern prior to 2020 and the onset of COVID-19, the pandemic made it more difficult to find and retain qualified teachers. Some administrators brought up being unable to pay teachers more without raising prices for parents who may be unable to pay. Administrators also mentioned a changing work ethic amongst some applicants who may be unwilling to stay due to lack of pay, growth opportunities and benefits compared to public schools, retail or the food industry. They also mentioned that there was a need for attention to mental health, noticing more burnout amongst those entering the field.

I've got my infant room teacher [who] has been here 22 years and she just turned 72 last week. My cook is 75, and she's been here 13 years and both of them want to retire, and they are stuck with me for two years because I can't find a replacement for the cook. So they are very loyal, very dedicated, and that makes me very, very sick that they have to work at their age. They don't have to but they do it for me.
Administrator, Suburban, 5-star

It's very discouraging because I'm using all types of platforms to try to hire. I've increased my pay. I'm looking to increase it again, just to even try to come close to what 5-star centers are offering right now. And again, it's been very hard, very hard.
Administrator Focus Group, across the state

I see that a teacher would leave because they've been offered more money and I can match money up to a certain amount, but once they get over \$15, it's very, very hard for me. Administrator Focus Group, across the state

Incentives suggested to retain and recruit professionals included pay, offering positive feedback, more growth opportunities and benefits such as health and dental insurance.

I don't know what makes me stay. I do think that if we were treated more like teachers in the public school system and we got the benefits and the respect. I mean, I had a parent come up to me the other day and say: "Did you ever not want to be a real teacher?" and [I] just looked at her and said: "I really thought I was". Teaching Staff, Rural, 4-star

I love learning new things, and I love seeing other people learn and grow. And then I get paid a fair wage . . . If more people made closer to what I made, I think it would be more consistency. Teaching Staff Focus Group, across the state



Participants showed their dedication to the field and children by continuing to work despite increased workload due to heightened sanitation and difficulty with retention and recruitment.

Participants mentioned having to wait longer periods of time to get access to the training/workshop needed, lack of assistance or training being at an inconvenient time. They also expressed how virtual training was difficult for some staff, which was one of the reasons for staff loss. Finally, they discussed the hardships that came with staff shortage and not getting more time for planning during the day.

Virtual meetings don't feel the same because you're not as connected with your team "work family." Teaching Staff, Rural, 4-star

Some positive effects were noted by participants, such as how the perception of ECE educators changed for the public. Smaller teacher to child ratios and preventing parents from entering the classrooms led to smoother transitions for children at drop off. Participants also expressed an uptick in attention to sanitation and precautionary health measures as a positive result of the pandemic procedures. There were also positive responses to the accessibility of virtual meetings and training. Teachers appreciated the virtual training option which they could do in the comfort of their homes instead of driving elsewhere after work hours. The FCC providers and administrators appreciated the extended timeline for renewing their licenses.



Effect of the Pandemic on Families and Their Children

Although the present study does not focus on young children and their families *per se*, data collected from surveys, interviews and focus groups provide some insights worth reporting—training to support children in grief, new hygiene practices, alternative to in-person learning, etc.

Supporting Children in Grief

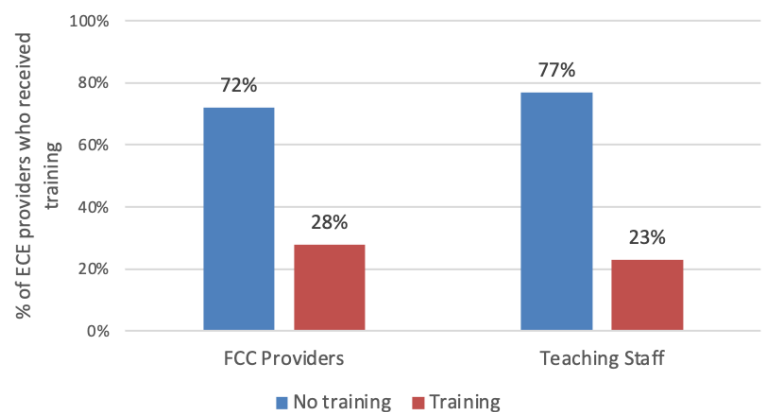
One of the dramatic consequences of the pandemic is the loss of close ones. Thousands of children lost a parent due to COVID-19, an experience described by one interview participant.

One of my kids' dads passed away because of COVID . . . My boss, I talked to her . . . I needed to know what I should do about him. What is the right way to talk to him? How can I support his loss and his sadness? . . . She actually bought a book for me to read it first, and then to read it to the kids and she did print some information for me . . . So I read the book, and every time he came to me and said "I really miss my dad." Oh, my God! That was hard! It was very hard . . . But anybody can die anytime, and I would like to be more prepared to help my child, and not just say I'm sorry because sometimes saying I'm sorry it's not good enough for them. Teaching Staff, Rural,

Teaching staff and FCC providers were asked in the survey whether they had ever received formal training to support children who had experienced grief. As presented in Figure 11, participants largely responded that they had not received any, with only 28% of FCC providers and 23% of teaching staff responding that they did have some type of formal training in handling childhood grief.



Figure 11. Training to Support Children Who Had Experienced Grief



Effect of Hygiene Practices on Young Children

During interviews and focus groups, participants also discussed the effect of wearing masks on children's social emotional development. Specifically, participants mentioned that younger children had difficulty adjusting to wearing masks because they were unable to read facial expressions. Participants noticed that some children they served had developmental delays, specifically speech, along with anxiety and stress. Those were reflected in their behavior with teachers and peers. Educators had to re-teach three year old children how to share and how to appropriately use toys.

The kids, they definitely changed because they couldn't really see our emotions. We have to take training based on how to move like, you know, your eyebrows. They had to see important expressions in your eyes so they knew if we were happy or disappointed. Teaching Staff, Rural, 4-star

[The pandemic] has been very stressful on the children, because, you know, for two or three years, they were home and now they're starting to come back and we're seeing a lot of children that are having trouble handling, you know, being in a group setting, because they're so used to just family settings. Administrator, Rural, GS-110

They don't play with toys, like we're teaching our three year olds what we would normally teach our toddler classroom. Administrator, Rural, Temporary

Some practices and routines implemented during the pandemic had a positive impact on children, as participants reported greater hygiene awareness and independence. The pandemic also made it necessary to have students in smaller groups, which ultimately led some children to improve their

social emotional skills.

There was access to a lot of trainings during that time period for social, emotional, mental health, and I think that because a lot of the children were being isolated . . . some of the teachers that I know really try to have a positive impact by providing some of those mental, social, emotional strategies to the children and not just focus on academic. FCC Provider, Urban, Temporary

Going back to the sanitation practices, [children] are helpers now... They definitely enjoy using the spray bottle of soapy water or helping the teacher wipe down, getting into those routines of doing [sanitation procedure] all the time . . . has allowed them to have a little more responsibility in what they're doing. Administrator, Urban, 4-star

I think we talk more about cleaning up and covering our nose and washing our hands, talk more about germs. So, the kids are made a little bit more aware . . . And they will tell each other, 'we don't put toys in our mouths. We don't put our fingers up our nose.' So they are aware of it now. Mixed Administrator and Teaching Staff Focus Group, across the state

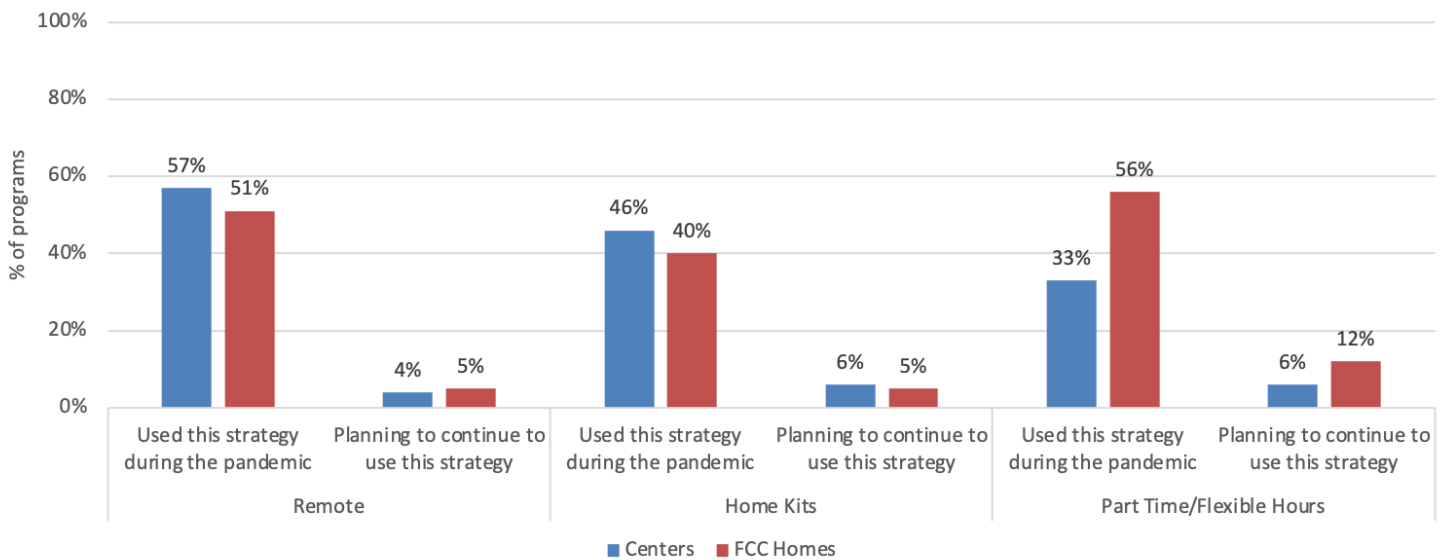


Participants recognized that families were forced to adapt as well. They had to navigate relationships with families during the pandemic in the midst of heightened emotions due to consistent changes. Participants noted that changing communication methods both increased and decreased the frequency and depth of relationship with families. Participants also reported that parents were not allowed to enter classrooms and in some cases they were not allowed in the building altogether. However, families were kept informed of their children’s progress through phone calls, texts and apps.

Due to sites having to close and open unexpectedly, alternatives to in person learning were offered. Those alternatives included, for instance, remote learning, take home kits and part time or flexible hours for staff. As presented in Figure 12, 57% of administrators and 51% of FCC providers used remote learning in their programs. However, a small percentage of administrators (4%) and FCC providers (5%) planned to continue using remote learning. In addition, 46% of administrators and 40% of FCC providers provided families with home kits during the pandemic. Again, a small percentage of them planned to use this strategy moving forward (6% of administrators and 5% of FCC providers). Finally, 33% of administrators and 56% of FCC providers used part time or flexible hours during COVID-19, and 6% of administrators and 12% of FCC providers planned to continue to use flexible hours.

So you had to communicate with families that weren’t able to come into your building and actually meet your teachers.
Administrator Focus Group, across the state

Figure 12. Alternatives to In-Person Learning



Those percentages align with discussions occurring during interviews and focus groups. Most of the participants reported that they did offer alternatives to in person learning: some sent out take-home packets or did virtual classes. However, they also discussed the challenges of teaching young children virtually and teaching them social distancing. Participants who did not offer alternatives either shut down completely during that time or remained open.

We had barriers that we built, out of a project board. We just did everything that we could to keep [children] separated. Administrator, Suburban, 3-star

It is difficult when you have children who are learning through purposeful play to try to do that online. Administrator Focus Group, across the state

[We] didn't try it for that age group. It's very hard to do anything online. Administrator Focus Group, across the state

We did not do a lot of the virtual learning. We still welcomed our families to come in. Administrator, Suburban, 4-star

Due to lockdown restrictions, participants reported that their programs were forced to cancel field trips and regular outings in their communities. Thus, providers resorted to taking advantage of outdoor learning opportunities in order to build on social skills and prevent the spread of illness.

Basically we spent as much time outside as we possibly could and we kind of tabled the things like Letter of the Week and some more academic things that we used to work on and it was basically just about keeping kids safe and that was kind of the primary focus. Administrator, Rural, 5-star

Any chance we got to spend any extra time outside, we did, so that gave them the opportunity to learn how to play on the playground. Teaching Staff Focus Group, across the state

Participants shared examples of creative alternatives to field trips to engage children and give them new experiences, such as virtual field trips to museums, zoos and aquariums. Beyond field trips, children also missed out on occupational therapy sessions. Participants also reported more difficulties offering center tours to families.

They had virtual field trips that you can go on like different science centers and zoos and things like that. Teaching Staff, Urban, 5-star

It was difficult giving in person tours. We also weren't able to do a grand opening as we wished with bounce houses and face paint and [we were] unable to make it festive. Administrator Focus Group, across the state



Support Received During the Pandemic

Throughout interviews and focus groups, participants showed gratitude for the funds received from the state and other organizations. Most administrators stated that they were able to stay open due to the stabilization grants, recognizing that they would have had to shut down if not for that support. Additional forms of support participants mentioned were income tax credit and the WAGES program.^{vii} They also recognized the support from non-profit organizations such as Smart Start and the Partnership for Children. Participants also showed appreciation for support from families.

Support from the State and Stabilization Grant

During the focus groups and interviews, administrators discussed how the stabilization grant assisted in raising wages for their staff and getting new equipment for their centers. They expressed that their experiences with the stabilization grant were generally positive.

The stabilization grant allowed administrators to provide staff bonuses or raises, training and benefits. Administrators discussed how the stabilization grant allowed them to open retirement accounts, to contribute to their staff's 401K, to do much needed renovations at their centers and to keep their doors open through the pandemic.

I just wanted to say that I appreciate it.
Mixed Administrator and FCC Provider
Focus Group, across the state

*The stabilization grant really helped me
be able to stay open and stay in business.*
Administrator, Rural, Temporary

*Bonuses from [the] stabilization grant
helped so much and kept the staff morale.*
Administrator, Suburban, 3-star

Teaching staff reported an increase in pay, bonuses, money for supplies and were, too, very positive about the stabilization grant.

*It shouldn't [have] took the pandemic to
give teachers and staff money to help live.*
Teaching Staff Focus Group, across the
state

*At that time, it was very, very helpful. My
supervisor really didn't tell us what it was
for and where it came from.* Teaching Staff,
Rural, 3-star

*I believe we had different amounts
according to how long you've been at the
center and your position.* Teaching Staff,
Suburban, 4-star

The only negative statement from participants was that NC Pre-K only sites were not eligible to apply for the stabilization grant and administrators wished their teachers had access to those funds as well.

FCC providers also stressed their ability to purchase playground equipment and mulch for their homes to better accommodate their children.



We definitely worked on our own retirement funds so that was a really wonderful boost. I got a \$700 load of mulch at one point and I need to get another one now. Unfortunately, it goes away. FCC Provider, Suburban, 5-star

I was able to purchase food, do maintenance on the facility like painting. . . I was even able to start a library, an African American library for my children. I was able to purchase books to do that, which I was never able to do because it was pricey and money was going towards other things like the food, the maintenance of the facility . . . I was able to replace the fence, the privacy fence in the back for the children to keep them safe. FCC Provider, Suburban, 4-star

Participants were invited to reflect on the main consequence of the termination of the stabilization grant, and the pandemic relief funding cliff. Indeed, the 2021 federal funding for North Carolina child care was over one billion dollars, compared to a \$400 million during a typical year.^{xix} Respondents expressed general concerns and regrets over the ending of the stabilization grants. Participants explained that they believed the loss of funding will lead to even more retention issues, particularly the loss of educated teaching staff. Some

administrators will have to let some staff go, leaving enormous workloads and stress on remaining teachers. The added stress will also have an effect on the mental health of professionals. Less funding will also ultimately lead to rising child care costs.

I don't know how some of them are going to survive without the additional funding. FCC Provider, Urban, 4-star

To address the end of the stabilization grant, ECE providers suggested maintaining raises started during the grant period so that professionals in the field could achieve a livable wage. Some respondents believed that through taxes for child care, the state could invest in the industry and provide a retirement plan for workers. Tuition increases for parents, although not desirable, were also mentioned as a way to address the ending of the grant.

We are now looking at our budget to make sure we can maintain the raises. Mixed Administrator and FCC Provider Focus Group, across the state

Continue to offer teachers true livable wages. If the state can't provide us with actual money, maybe they can start a retirement program or something for early childhood education settings. Administrator, Suburban, 4-star



Other support

ECE providers recounted the support they received during the pandemic from relatives, friends, and families of children they served, while recognizing that many of them were in need themselves. Businesses and community institutions provided not only help for centers and FCC homes, but also for families. Churches, Smart Start, Child Care Resource & Referral agencies and Early Head Start were cited as sources of support. Additionally, the Department of Social Services and food programs in the areas also gave much needed assistance. ECE professionals also expressed gratitude to state and federal agencies that

provide mental health resources.

They [families] gave me and my co-teacher both \$250 gift cards. Teaching Staff Focus Group, across the state

The local child care resource and referrals agency provided us with cleaning supplies and Smart Start provided us with grant money. Administrator and FCC Provider Focus Group, across the state



Challenges & Successes

Practices to Maintain

Participants shared during interviews and focus groups practices that were created during the pandemic that should be maintained post pandemic.

Centers and FCC providers indicated that sanitation and deep cleaning practices should be continued. In addition, some participants suggested keeping masking policies as well as temperature checks. Also, having parents outside of the classroom during drop off and pick-ups was a practice that is still being implemented in a number of sites. Participants also talked about virtual communication with families. Some noticed an increase in the empathy/care given towards children, teachers and families.

Now they [parents] bring the children in the building, but they still don't come in the classrooms, which keeps germs down.

Teaching Staff, Urban, 5-star

It is good all the extra cleaning that we're having to do because again, if you have healthy kids, you have healthy staff.

Administrator, Suburban, 4- star

I think having parents pick-up/drop-off at the door is good. I mean, it involves more staff because they have to come to the rooms and get the child, but it's also less disruption in the classroom. Administrator and FCC Provider Focus Group, across the state

The pandemic gave me a chance to reevaluate everything. [It's] not just a business. We also have to remember that we're dealing with children, and we're dealing with adults who have lives outside

of our facility. Administrator Focus Group, across the state

During the pandemic, participants found virtual training more accessible than traditional courses which often required long commutes or were offered at inconvenient times. Many mentioned that they hoped these options to pursue virtual technical assistance would continue long-term. Educators also cited local Partnerships for Children and Child Care Resource & Referral agencies in offering technical assistance.

Being able to offer some of the trainings and things that were required to have online through Zoom would help out because we're in a very rural county. Administrator, Rural, GS-110

Required trainings that were online and on Zoom instead of having to go were great. FCC Provider, Suburban, 5-star

Martin Pitt Partnership and [Onslow County] have provided tremendous [technical assistance] to our teachers and classrooms. Administrator Focus Group, across the state

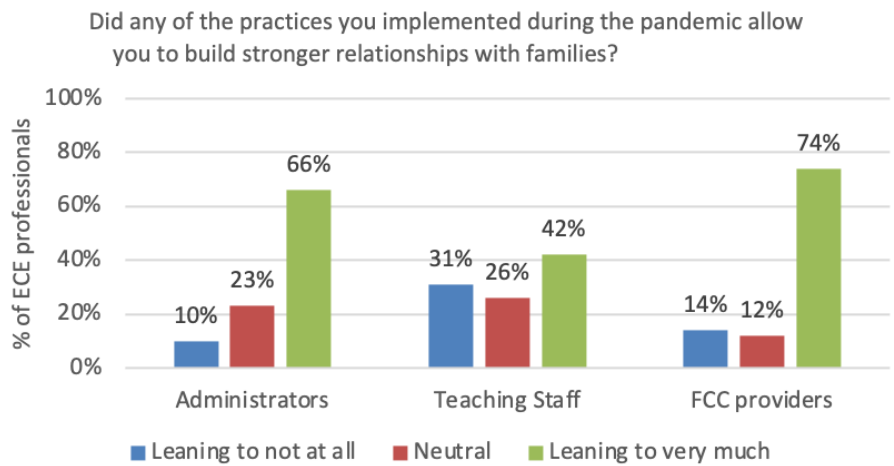
Relationships with Families

ECE providers were asked in their survey if the practices they implemented during the pandemic led to stronger relationships with families. As presented in Figure 13, 74% of FCC providers indicated that their practices contributed to the building of stronger relationships with families. About 66% of administrators believed that their practices helped develop stronger relationships with the families they served. About 42% of teaching staff believed that stronger relationships were built.

During interviews and focus groups, ECE professionals cited examples of practices that have led to stronger relationships with families. Even though communication during the pandemic was strained due to lack of in-person opportunities, staff relied on technology to communicate with parents such as email, phone calls, text messages and virtual communication apps. These communication methods allowed for more family involvement and led to more family support and interaction. Additionally, providers shared that having strict policies and procedures in place with staff, children and families led to fewer closures which ultimately helped relationships with families.

Being firm with procedures and sticking with them. Parents were more accepting to rules and procedures. Mixed Administrator and FCC Provider Focus Group, across the state

Figure 13. Relationships with Families



Now that parents are coming back in, they talk more to the teachers and teachers communicate with them more. Administrator, Suburban, 3-star

[They were] more supportive because it was like we were the only people they saw for those couple of months. Families expressed appreciation. FCC Provider, Rural, 2-star



Across positions, regions and program sizes, participants expressed that families had more open communication and were more willing to discuss their children’s behaviors.

Because they weren’t able to go into the schools at the time, we really put emphasis on building that communication with the parent . . . [We] went to a lot of implementation of softwares like Wonder School or Hi Mama or Pro Care, things like that. FCC Provider, Urban, Temporary

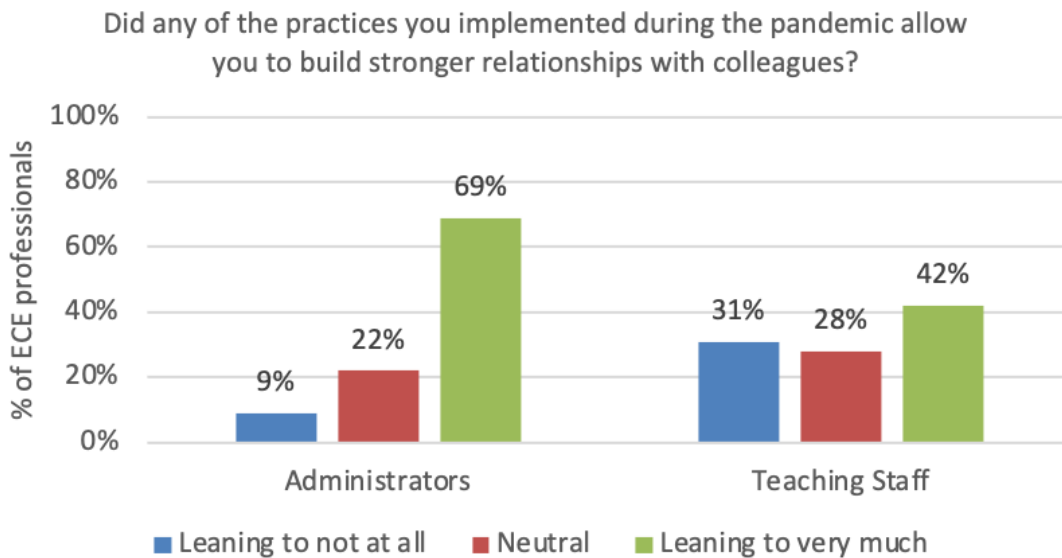
I think that embracing the parents as partnership in their child’s education was something that we really kind of were forced to do through the pandemic. And I think that it became something that although we wanted to do in the past, we had no choice at this point and we really

had to navigate it and make it work in order to keep everybody moving forward to the best of our ability. And I think some parents really benefited from it and I think that some teachers really benefited from it. Mixed Administrator, FCC Provider and Teaching Staff Focus Group, across the state

Relationships with Colleagues

Administrator and teaching staff survey recipients were also asked if any of the practices they implemented during the pandemic helped to build stronger relationships with colleagues. As presented in Figure 14, nearly 70% of administrators felt that their practices implemented during the pandemic helped build stronger relationships with colleagues. About 42% of teachers believed that their efforts and practices helped in developing better relationships with fellow staff.

Figure 14. Relationships with Colleagues



During interviews and focus groups, ECE professionals shared examples of new practices and routines that have had a positive impact on them and their coworkers. One positive practice has been more empathy and advocacy for providers in this field. This has led to stronger relationships for those who went through the pandemic experience together. Being together throughout the pandemic enabled staff to vent and to render support to each other. More understanding from administrators was also cited as a positive impact. Also addressing health and safety has been beneficial through practices such as health checks, masking and being aware of mental health challenges.

Just going through all of it together strengthened everybody's relationship [who have] been here through the whole thing. Administrator, Suburban, GS-110

Teachers and administrators also mentioned that staff showed more attention to both physical and mental health during the pandemic. Respondents believed new routines and practices boosted the morale of staff and their coworkers. As teachers fell into the routine of social distancing, many educators relied on one another for support and had more empathy for their coworkers.

There's a lot more attention now to staff's physical and mental health, because a lot of us saw a lot [of] hard times just dealing with our own sort of source of trauma from the pandemic. Mixed Administrator, FCC Provider and Teaching Staff Focus Group, across the state

Because I was trying to build a team of people in an unorthodox time when people didn't want to work, there was nobody to work. I knew that my attention immediately went to 'how do we create policies and procedures that are more favorable to

staff?,' because if the goal is to have staff in the building, that's the only way we can open. Administrator, Suburban, 4-star

Suggestions to Bounce Back From the Pandemic and Strengthen the Field of ECE

Participants were asked to reflect on the support they need to bounce back from the pandemic and strengthen the field of ECE.

Support Needed to Recover from the Pandemic

Participants shared during interviews and focus groups the support they believed would be helpful in moving beyond and recovering from the pandemic.

One of the leading areas of need for professionals related to teacher shortage. Administrator participants indicated that recruitment support and basic training is needed for programs to move forward and recover from the pandemic. Participants reported that many centers have lost qualified staff and need to replenish teachers in order to ease workloads. Related to staffing, professional development to support social and emotional skills emerged for a participant.

It had been hard staffing for a while, to keep staff and find staff and find substitutes. Administrator, Rural, 5-star

Keeping my staff, qualified staff that really love early childhood education, and the children, and that's willing to do what the state of North Carolina tells me to do. That's what will keep me forward. Administrator, Rural, 4-star

Focus groups and interview participants discussed the financial support that would allow them to recover from the pandemic. This would include increasing teacher pay, paying bonuses and ensuring staff receive benefits. Investment is also needed for the education of staff and pay commensurate with education and experience. Support is also needed for hiring substitute teachers, replacing supplies and materials and maintaining safety procedures put in place during the pandemic.

We had to pretty much across the board, raise everybody \$1.00 to \$2.00 an hour, just to keep up with things to be competitive with other jobs in our area. Administrator, Rural, 5-star

Some teachers who are looking to further their career or go back to teaching after they left for the pandemic, maybe they have to refresh some skills . . . or they need to take a course to, you know, go to a higher teaching position but they don't, they can't necessarily afford to pay for that. I think it would be wonderful if their employer would support them in that financially and give them, give them funds to do that on the side in addition to working. Teaching Staff, Suburban, Temporary

Another important theme arising from participants was the need for mental health and wellbeing strategies to support early childhood professionals following the pandemic. Respondents indicated that encouragement from center leadership along with a wellness program paid by the state would help in managing job-related stress. Access to private counseling, with insurance assistance, has also been recommended by ECE providers. A mental health specialist on staff, with specialized training, as well as the capacity to provide resources and financial help for teachers and administrators is needed. Other needed strategies include paid

mental health days, workdays for classroom preparation and occasional free meals for teachers.

Of course, [mental health] is something serious. That's something we don't take lightly at all because if we're not on our game, teachers are not on 100%, how can they help someone else when they've fallen apart inside? Administrator, Suburban, 3-star

A lot of centers still are so understaffed . . . it's so stressful on the staff that are there. Teaching Staff, Suburban, 5-star

Be able to go and see like a counselor or therapist when they feel burned out or overwhelmed. Teaching Staff, Urban, 3-star

it's so stressful. And I agree. I mean we're pushing them to their max. Administrator Focus Group, across the state

The teacher part is wonderful, but being able to replace all that stuff as often, you know, is really a challenge. I mean, it's very costly. It adds up, especially when you're looking at every couple of months that you're needing to replace things to continue meeting you know your indicators. . . . So those, I mean, I think those are probably two of the biggest challenges of having all of the new staff, you know, worried about not meeting all of our education requirements. Administrator, Rural, 5-star

Support From the State

Focus group and interview participants expressed their interest in receiving help from state agencies to recover from the effects of the pandemic. Suggestions to support child care centers included funding for staff and for families with low incomes, and receiving specialized training to meet the needs of children. Agencies such as the Department of Public Health were vital for programs to receive PPE and other supplies. Participants also reported the need for more involvement of members of the state legislature in advocating for the field.

One of the big ways that the state can help us specifically is if there's anything more they can do about the grants.

Administrator Focus Group, across the state

Funding to help educate the parents, materials that we could share in the classroom, definitely materials.

Administrator, Rural, 4-star

I just don't feel like the state by any means does enough. I think they're still in kind of an old school way sometimes of thinking "Okay well they're just babysitters. They don't do anything." And you know, there's been a big battle in this field because that's not what we are, and you know that educating the state, educating the officials in the state that kind of have the power over funds that can go to centers, that can, you know, help boost them up to help, which might bring in more staff. Teaching Staff, Suburban, 5-star

Support From Families

Participants recognized and appreciated the help received from families throughout the pandemic. Moving forward, they explained that families could continue by being advocates for the centers or FCC homes their children attend. Participants have expressed the importance of good communication between families and teachers, keeping families, children and programs safe and healthy by being transparent regarding sickness. Participants also reported that parents can help with consistency between school and home by practicing skills learned with their children. Families can also help strengthen centers and FCC homes by providing food and supplies if able.

Families and community can advocate for early childhood providers. Administrator Focus Group, across the state

My parents and families, they helped me in whatever way... sometimes they would just purchase the milk for me. Administrator, Rural, 4-star

Support From Communities

Interview and focus group participants also provided suggestions regarding the support they receive, or wish to receive, from their communities. Activities outside of school at libraries and museums could support and help programs recover from the pandemic. Other institutions in the community such as the local school system could help with providing services to children in child care centers and FCC homes. Technical assistance through Smart Start or CCR&R agencies and advocacy in the community was also reported as beneficial and as a crucial part of recovering from the pandemic.

Smart Start is a wonderful resource. They do a lot of marketing to get people interested in having a child care home. Teaching Staff, Suburban, 5-star

We work with the county school system a lot. They come in and do a lot of work with the kids: speech, therapy and some other things. Teaching Staff, Suburban, 4-star

Recommendations from ECE Professionals to Strengthen the Field of ECE

Finally, interview and focus groups participants were invited to reflect on two or three strategies they would recommend the field of ECE to endorse regarding recruiting and retaining highly qualified early childhood professionals. Those strategies cannot be implemented by programs on their own without critical financial support from the state.

Recruiting Highly Qualified Early Childhood Professionals

Strategies participants recommended for the recruitment of highly qualified early childhood professionals included offering specific training for center administrators on how to address recruitment. Potential recruits should have a definite interest working in the field and hiring managers should clearly communicate information about quality and employee expectations to candidates. Administrators expressed a need for administrative help when in hiring mode. Grants for recruiting staff and help with targeting community colleges to find pools of teachers and interns were also advised. In

addition, encouraging the offering of early child care courses in high schools was suggested, which could be associated with an internship or apprenticeship program. Using word of mouth by families as well as consistently advocating for the field could also be beneficial. Once candidates are found, sign-on and keep-on bonuses, funded through the state or other sources could be offered as final steps in the recruitment and hiring process.

A lot of people are just interested in the paycheck and I would want to know if a person is interested in working with children. . . . You have to be able to keep your balance emotionally. Teacher, Rural, 5-star

To recruit I often have in the past looked at some of the community colleges. Mixed Administrator, FCC Provider and Teaching Staff Focus Group, across the state

We have hired some interns that came out to get their hours joining and were hired after the internship. Mixed Administrator, FCC Provider and Teaching Staff Focus Group, across the state



Interview and focus group participants mentioned some benefits that, if offered, could be helpful in the recruitment process. The onboarding process should include a few weeks of intensive training which could be offered virtually or in-person. Training could also include clear pathways in the field and opportunities for growth. Child care teacher recruits should receive pay for the education they have and receive full tuition assistance to enroll in higher education. Compensation packages should also offer benefits such as health, dental, vision, vacation pay, PTO and free child care for staff.

. . . offering paid continuing education for college coursework, some type of subsidized funding for education. Administrator Focus Group, across the state

So the reason that I came to the job that I'm currently at is because they did have good recruitment strategies. They offered 40 hours of new hire pay. They offer competitive wages and training and onboarding time. So there was three weeks of just training and onboarding so I knew exactly what this company expected of me. Teaching Staff, Suburban, 5-star

Yes, well, I think, you know, having a really clear path to continue to educate oneself and to be able to kind of move up and to continue to move up and not just get to a point where you are kind of maxed out on what you can do. Teaching Staff, Rural, 3-star

Administrator participants shared incentives they used to recruit highly qualified early childhood educators. Health insurance and benefits that include paid sick time, vacation and PTO were offered in some centers. Certain programs expressed that they provide quarterly bonuses in addition

to hiring and recruitment bonuses, as well as raises based on education. Other center administrators indicated the importance of demonstrating appreciation for staff and offering incentives such as paid birthdays off, teacher workdays and maintaining a positive and supportive work environment.

I do birthdays. . . [and] if they take a day off in the month, I pay them. Administrator, Rural, 4-star

We offer hiring bonuses, recruitment bonuses. Administrator Focus Group, across the state

We offer luncheons, paid training days, bonuses, paid holidays. Administrator Focus Group, across the state

Some incentives that were mentioned by teaching staff were being reimbursed for the initial requirements like: CPR, First Aid training, and background check.

Retaining highly qualified early childhood professionals

Participants from interviews and focus groups were also invited to reflect on strategies to retain highly qualified early childhood professionals. Valuing and respecting child care educators along with funding to raise wages provide a solid base for retaining staff. Offering state benefits including an adequate health package would also help with retention. Additional funding for training programs to groom and grow qualified staff was also suggested. Partnerships with community colleges can offer support to retain staff by offering courses to help teachers advance in their careers, along with incentives by the state, such as increased pay for education and reimbursement for school supplies. Relationships with families, with guidance from center leadership, could allow teachers to know their students better and be more prepared to meet their needs utilizing parental conferences and home visits.

You work really, really hard for a little amount of pay. That's gonna burn you out as well. Nobody's gonna stick around just to get the bare minimum. Teaching Staff, Rural, 5-star

Retaining good employees really comes down to support and respect. It is not an easy task to implement curriculum and build a classroom community, spend the time that I needed to inform myself on what these children needed before they came to me. And they also require home visits. Teaching Staff, Suburban, 5-star

Teaching staff participants noted spending their personal time and money to buy/create activities and supplies for their children/classroom. Multiple educators spoke about their planning time not being compensated when done outside the working hours. One of the incentives that was highlighted was being able to take personal time or sick days off without worrying about not getting compensated.

When we had to have CPR in, you know, or any of that and we had to do it outside of work. Teaching Staff, Large, Suburban, 5-star

Always coming down my pockets about extra things and make sure that my babies are good. Teaching Staff, Urban, 3-star

FCC participants highlighted that they were putting in more hours than they were compensated. Since they work from their homes, they find themselves working before and after hours on a daily basis; from cleaning, coaching families, shopping for groceries to doing laundry.

There is no more [money] whether we work 60 hours a week or 100 hours that week there is no more money. FCC Provider Focus Group, across the state

There is no alternative. We are the administrators, we're the educators, we're the maintenance crew. FCC Provider Focus Group, across the state

Focus group and interview participants not affiliated with the public school system wished they could offer benefits (e.g. insurance, paid time off, retirement) similar to what K-12 teachers receive. Administrators also wished they could offer more training during the day instead of having it after hours in order to respect staff who have worked long days. In fact, some administrators would like to offer personal wellness to staff. Providers mentioned the importance of compensation for teachers buying materials and desire to connect teachers with more resources like the WAGES program.

[Department of Public Instruction] is a state agency so they get [a] state health plan. And you know that's the largest employer. I think as a general rule, the public school has better pay, better benefits, especially since it's a state agency. Mixed Administrator, FCC Provider and Teaching Staff Focus Group, across the state

I'm very, very grateful . . . when I get that extra money that comes in from T.E.A.C.H., WAGES . . . I'm so grateful for that, because sometimes with that money I have bought a lot of my extra stuff that I've got. So I'm so grateful that we get that money. Teaching Staff, Suburban, 4-star

Conclusion

The 2022/2023 workforce study report, through quantitative and qualitative data, provides a snapshot of the ECE workforce, insights on their experiences during the pandemic and suggestions to strengthen the field of ECE. Several main findings should be highlighted in view of the COVID-19 pandemic. Although some positive effects emerged from interviews/focus groups, such as the focus on sanitation, some negative effects must be examined in order to be addressed.

An important theme that emerged from interviews/focus groups was the loss of teaching staff during the pandemic, and the issues with hiring new people who are highly/adequately qualified. People leaving the profession, or the temptation to do so, was noticed by administrators, teaching staff and FCC providers, and align with the survey data showing a higher percentage of people saying they would leave the profession in the next three years than prior to the pandemic. Turnover has always been an issue in the ECE field, but the pandemic amplified such a phenomenon. One must listen to ECE professionals' suggestions echoed during interviews and focus groups to strengthen the field, and consequently, create a more attractive career for new hires.

A major issue that was reported prior to the pandemic and continuing to the present relates to wages. Although the stabilization grant allowed programs to offer hire bonuses or higher pay to people joining the field, some more experienced professionals did not see an increase in their buying power since 2019. In other words, though the stabilization grants allowed programs to increase salaries, those increases often did not keep up with inflation rates over the past several years.

Programs such as Child Care WAGES® and the Infant/Toddler Educator AWARDS® Plus programs, have helped by addressing the education, compensation and turnover of the early childhood workforce in North Carolina. WAGES, beginning in the mid-1990s, blends funds from local Smart Start Partnerships and the Division of Child Development and Early Education in those counties across the state where the local Partnership chooses to participate. In response to a growing body of research on the importance of the very earliest years of life, the AWARDS® program began in 2018, transitioned to AWARDS Plus during the pandemic, and is available in every county across the state to those teachers, assistant teachers and family child care providers who work full time with infants and/or toddlers.



The effect of the pandemic on the workforce education level is also worth noting, as data suggest that the workforce, overall, continued to grow their knowledge in ECE. In 2023, a higher percentage of professionals currently taking ECE courses was observed across all professions i.e., administrators, teaching staff and FCC providers, compared to prior to the pandemic. Easier access to education may be a contributor as the pandemic opened the door to courses offered remotely, as discussed during interviews and focus groups. 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® Scholarship Program have addressed some of the educational and financial needs of early care and education providers while lowering staff turnover. At the program level, child care centers offer staff opportunities to develop their teaching skills and professionalism through coursework and by creating a supportive work environment.

Another effect of the pandemic worth highlighting relates to the additional stress on the ECE workforce, as mental health challenges emerged as a significant concern. Indeed, the demands of working with young children, coupled with factors like high stress levels, low pay, long hours and limited resources often contribute to mental health issues. Thus, ECE professionals may experience burnout, anxiety and depression due to the emotionally taxing nature of their work.^{xx} Additionally, the lack of adequate support systems, both within the workplace and from the broader community, can exacerbate these challenges.

Finally, it is important to point out that the number of FCC providers continues to decline, barring families access to a

unique form of child care. Challenges that emerged from interviews/focus groups aligned with another studyⁱⁱⁱ in which FCC providers cited needs for more supportive infrastructure, expanding current benefits, providing technical assistance and professional development geared towards FCCHs as potential supports. In this study, FCC providers also mentioned the need for substitute programs to provide reassuring care for the children when FCC providers are absent, similarly to what was reported during interviews and focus groups.

At the end of the interviews and focus groups, participants were asked to highlight one thing that would potentially strengthen the field of ECE. The majority of the participants mentioned financial support, increased pay and benefits. Participants also discussed having a pool of substitutes that all ECE providers can have access to, a pool of individuals that would be already trained and certified. Participants shared their concerns about the ending of the stabilization grant, urging the state to continue the funding to help prevent a return to the low wages that were in place prior to the COVID-19 pandemic.

Early childhood is a crucial phase of development and access to high quality early care and education provides rich social and educational experiences to support the growth of young children. Such access also provides a supportive structure for working families. During the pandemic, ECE professionals were recognized as “essential workers,” along with doctors, nurses, firefighters and so on. Although the stabilization grant was of tremendous help, wages in the field are still below living wage for many ECE professionals, despite the vital role they play in young children’s development, families’ financial security and the economic viability of communities. Let’s not wait until the next pandemic to show them a well-deserved respect and fully support their economic well-being.



Recommendations

1. Distribute the findings of this study widely both within the ECE community and the larger public. Presentations should encourage center directors and FCC 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. Most importantly, the findings of this study should be reported to lawmakers and others in charge of the state budget and other funding sources so that significant funds can be invested in this essential field.
2. Advocate for fair and equitable compensation of the workforce. Despite the stabilization grants, wages in the field are still below the living wage for many ECE professionals. Significant and long-term efforts should be made by the state to provide the ECE workforce the financial stability they deserve.
3. Continue to elevate voices of early childhood professionals, especially those working on the front lines, directly with children in both centers and FCC homes. Because the study was conducted in English only, despite the richness of the non-English speaking ECE workforce and because recruitment of the participants for interviews and focus groups was based on programs, lifting up voices based on individual participants' identities (e.g., age, native language, race/ethnicity, etc.) was not possible. A follow-up study to advance the voices of people whose native language is different than English and the voice of people of color, especially women of color who have been reported to have been the most affected by the pandemic^{xxi},^{xxii} is strongly recommended.
4. Support the mental health of early childhood professionals by providing funding to programs ensuring that administrators, teaching staff and FCC providers can be fully present in their work. As highlighted in the report, the pandemic has been associated with much higher levels of stress among ECE professionals. While many programs have developed some strategies to help their staff, far more is needed to ensure that those teaching young children each day are at their best.
5. Support the recruitment of highly-qualified teachers, through financial grants and other programs from the state in particular. Indeed, throughout the study, participants indicated the desire to hire educated teachers despite the difficulty in finding qualified staff. Efforts from the state to create multiple pathways towards higher education should be recognized and supported. Teaching staff already hired should be encouraged to stay in the field through wage increase, and access to higher education. Programs such as Child Care WAGES[®], Infant-Toddler Educator AWARD[®] Plus and the T.E.A.C.H. Early Childhood[®] program are examples of efforts already available and working in our state.
6. Continue to prioritize funding to gain knowledge about the field. The 2023 workforce study provides critical information about the ECE workforce in North Carolina. Though these data have provided a better understanding of the ECE landscape two to three years following the start of the pandemic, the field continues to evolve. The state of North Carolina should continue to routinely fund a similar study of the workforce for the entire state.
7. Investigate the ECE education needs of families for their young children. Additional research studies are needed to uplift and understand the complex needs of families, who have been deeply affected by the pandemic, and the subsequent lack of child care options in their areas. Indeed, DCDEE data showed a decrease in child enrollment in all types of organizations – private for-profit, private not-for-profit, and public-funded centers. Studies are needed to investigate the cause, and the ECE alternatives young children not enrolled in licensed programs, received during the pandemic.

8. Address the FCC decline and support the growth in FCC. Some communities have no FCC homes. They provide a unique service to families, specifically for those needing flexible or nontraditional hours of care.
9. Advertise across the state ECE programs already in place. The knowledge early childhood professionals have of state and county programs to support their work should be assessed. Some of the supports mentioned by participants as needed are already available and may just have been unknown by ECE professionals. More marketing is needed for those programs.



Endnotes

- i See for instance National Academies of Sciences, Engineering, and Medicine (2018). *Transforming the Financing of Early Care and Education*. Washington, DC: The National Academies Press. doi: <https://doi.org/10.17226/24984>.
- ii See for instance, positive effects of preschool education reviewed in Barnett (2008). *Preschool education and its lasting effects: Research and policy implications*. National Institute for Early Education Research, Rutgers, NJ.
- iii See for instance a 2005 North Carolina Early Childhood Systems Study, conducted by Child Care Services Association, highlighting how “over the last ten years, North Carolina has made great strides in improving the early care and education of children across the state” (introduction, p. 2).
- iv Working in Early Care and Education in North Carolina. Workforce Study (2019). <https://www.childcareservices.org/research/workforce-studies/working-in-early-care-and-education-statewide-workforce-studies/2019-north-carolina-child-care-workforce-study/>.
- v e.g., the T.E.A.C.H. Early Childhood® North Carolina Scholarship Program provides educational scholarships to early care professionals and those who perform specialized functions in the early care system. For more information, see <https://www.childcareservices.org/programs/teach-north-carolina/>.
- vi e.g., the Child Care WAGES® Program provides education-based salary supplements to low-paid teachers, directors and family child care providers working with children between the ages of birth to five in participating counties. <https://www.childcareservices.org/programs/wages/>. The Infant-Toddler Educator AWARDS® (AWARDS) program provides education-based salary supplements to low-paid early educators working full-time with children birth through age two in North Carolina. <https://www.childcareservices.org/programs/awards/>.
- vii e.g., services offered to families by Child Care Services Association through Child Care Referral Central. <https://www.childcareservices.org/families/find-child-care/>.
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- ix Glasmeier, Amy K. Living Wage Calculator (2020). Massachusetts Institute of Technology. <https://livingwage.mit.edu/>.
- x Lin, Y.; McDoniel, M. (2023). Understanding child care and early education program closures and enrollment during the first year of the COVID-19 pandemic. OPRE Report #2023-237. Office of Planning, Research, and Evaluation, Administration for Children and Families, U.S. Department of Health and Human Services.
- xi North Carolina Rapid COVID-19 Response to Early Care and Education (2023) North Carolina Department of Health and Human Services and Frank Porter Graham Child Development Institute.
- xii Barnett, W.S., & Jung, K. (2021). *Seven Effects of the Pandemic on Young Children and their Parents: Initial Findings from NIEER's December 2020 Preschool Learning Activities Survey*. New Brunswick, NJ: National Institute for Early Education Research.
- xiii Jung, K. & Barnett, W.S. (2021). *Impacts of the Pandemic on Young Children and their Parents: Initial Findings from NIEER's May-June 2021 Preschool Learning Activities Survey*. New Brunswick, NJ: National Institute for Early Education Research.
- xiv North Carolina Child Care Resource and Referral (2020). Family Child Care Home Report
- xv Licensed child care centers include programs operated by public schools, for-profit entities, and not-for-profit entities and include Head Start/Early Head Start and programs with NC Pre-K classrooms. Family child care homes are owned and operated by an individual providing ECE within their home.
- xvi The percentage of school programs with an NC Pre-K program only include those elementary schools with licensed programs serving children birth to five. This percentage is not reflective of all public schools. “Other” public programs include sites such as state funded mental health sites or those run by public universities.
- xvii Home occupancy costs such as utilities, home repairs, insurance, and rent or mortgage payments are not included in this analysis.
- xviii FCC providers self-reported their hourly wage in the survey. For those who did not, wages were calculated from their expenses, source of income, and weekly hours.
- xix North Carolina Department of Health and Human Services
- xx Stein, R., Garay, M. and Nguyen, A. (2022) It matters: Early childhood mental health, educator stress, and Burnout Early Childhood Education Journal [Preprint]. doi:10.1007/s10643-022-01438-8.
- xxi E.g., Lee, E. K., & Parolin, Z. (2023) The Care Burden during COVID-19: A National Database of Child Care Closures in the United States, *Socius: Sociological Research for a Dynamic World*, Volume 7: 1-10.
- xxii Supporting the Child Care and Early Education Workforce: A Menu of Policy Options for the COVID-19 Pandemic and Recovery (2021). Urban Institute.

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