

Selected Survey Findings

A Survey of Centre-Based Early Childhood Education and Care in Canada



Child Care Human Resources Sector Council, February 2013

- This presentation is intended to present some of the findings of *You Bet We Still Care!*: a survey of Canada's licensed, full-day, centre-based child care sector, which was conducted from July 16 to September 30, 2012.
- The findings from this survey have the potential to contribute to a better understanding of the child care sector in Canada, and help to develop an action plan for the strategic direction of the sector; however, more analysis of the data is first required.
- Because of resources restrictions, limited analysis has been done with the data. What is presented here are, in large part, the facts and figures collected by the survey.

Presentation outline

- Background
- Methodology
- Child Care Centre Characteristics
- Child Care Staff Characteristics
- Recruitment and Retention
- Job Satisfaction
- Conclusions and Next Steps
- More Information

You Bet We Still Care! - Survey Findings

A note about terminology

Provinces and territories use a variety of terms to describe programs that serve young children and their families. In order to be consistent throughout the survey, we used the term "early childhood education and care (ECEC)" to refer to the broad range of programs offered. These include child care centres, early learning centres, early years centres, early childhood education programs, nursery schools, parent/child drop-ins, early intervention, family resource, kindergarten and other related programs. We recognize the variety of terms that are used to describe full-day programs for young children. For simplicity and consistency, this survey uses the term "child care" to refer to licensed, full-day (operating for at least 6 consecutive hours/day) centre-based programs for infants, toddlers, and/or preschool-age children, which may also include school-age children.

Data reporting

Most data has been reported using the **median**. Median figures represent the numeric point that divides one half of the population from the other. The median is better suited to wide distributions of data in order to report a central tendency. It is considered to be a more reliable and robust measure than the average or the mean.

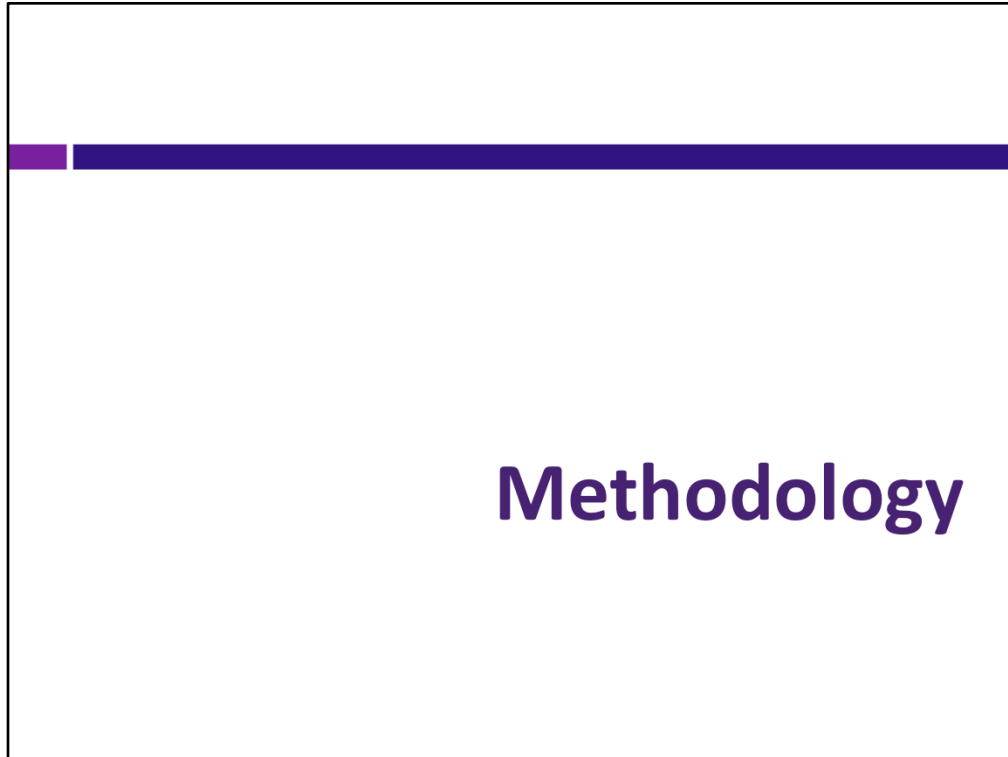
Background

- In 2009, the Child Care Human Resources Sector Council (CCHRSC) identified the development of a survey of the child care sector as a top priority
- Previous studies of the child care workforce and workplaces:
 - *Caring for a Living* (1991)
 - *You Bet I Care!* (1998)
- *You Bet We Still Care!* (2012)
- Research Team
- Project Steering Committee

You Bet We Still Care! - Survey Findings

Background

- In 2009, the Child Care Human Resources Sector Council (CCHRSC) put together an expert panel to develop a Labour Market Information Research Agenda for the child care sector. Because of the scarcity in data on the child care sector, the panel identified the development of a survey, similar to previous sector surveys, as a top priority. As a result, *You Bet We Still Care!* was conducted in 2012.
- Previous studies of the child care workforce and workplaces include *Caring for a Living* (1991); and *You Bet I Care!* (1998). These datasets are not publicly available. Any comparison of 2012 data to these studies must be done using information provided in the 1991 and 1998 final reports. Data can be compared from YBIC and YBWSC for selected questions only.
- *You Bet We Still Care!* objectives
 - Add to the Canadian body of evidence about wages, working conditions and human resource issues in regulated child care centres.
 - Build on data from *Caring for a Living* (1991) and *You Bet I Care!* (1998)
 - Contribute to a long-term picture of human resources for the Early Childhood Education and Care (ECEC) sector in Canada, and provide employers with essential data to address human resources challenges such as recruitment and retention, training and professional development opportunities for career advancement, and job satisfaction.
- Thanks to this survey, there is now a considerable amount of new data on the child care sector for researchers to work with. Initially, the purpose of this project was to inform a sector study, develop an action plan for further data analysis, and identify and priorities for further research into the sector. However, with the end of the CCHRSC program, there is no longer funding available for further analysis of the data.
- **Research team:** Kathleen Flanagan and Jane Beach - Project Co-leaders; David Northrup – York University’s Institute for Social Research; Petr Varmuza - Quantitative Data Specialist; Gillian Doherty – Survey Design Consultant; Linda Lowther - French speaking liaison
- **Project Steering Committee:** Jamie Kass - CCHRSC Board, Canadian Union of Postal Workers, Project Chair; Donna Lero - University of Guelph Martha Friendly – Childcare Research and Resource Unit; Christa Japel – University of Quebec a Montreal; Lynell Anderson - University of British Columbia; Kim Hiscott - Andrew Fleck Child Care Services; Margaret Ferniuk - Provincial/Territorial Directors of ECEC; Diana Carter, CCHRSC Executive Director; Ashley Stewart - Project Manager



Methodology

- Research questions
- Target population
- Timeline and key activities
- Survey dissemination and data collection
- Distribution of responses

Research questions

1. What are the current characteristics of centre directors and program staff in licensed, full-day ECEC centres?
2. Have experiences with recruitment and retention of staff in licensed, full-day ECEC centres changed since information was collected for *You Bet I Care!?*
3. What are the human resource practices/strategies in licensed, full-day ECEC centres that are associated with selected indicators of job satisfaction?
4. Are there centre characteristics that are associated with selected indicators of job satisfaction, and, if so, what are they?

You Bet We Still Care! - Survey Findings

Research questions

The survey was designed with the following research questions in mind:

1. What are the current characteristics of employers and employees in licensed full day ECEC centres with respect to their educational qualifications, duration of employment, job satisfaction, and terms/conditions of employment?
 - a. How have these characteristics changed since they were studied in the *You Bet I Care!* study in 1998?
 - b. Are there trends to be identified across Canada based on province/territory or respondent category?
2. Have experiences with recruitment and retention of staff in licensed full day early childhood centres changed since information was collected for *You Bet I Care!?*
3. What are the human resource practices/strategies in licensed full day ECEC centres that are associated with selected indicators of job satisfaction?
4. Are there centre characteristics that are associated with selected indicators of job satisfaction, and if so, what are they?

Target population

You Bet We Still Care! was targeted to

- 1,000 employers; and
- 4,000 employees
- Eligible respondents had to be working in full-day, centre-based child care for children aged 0 to 6 years
- Multiple versions of the survey were sent to different segments of the target population
 - i.e., there was one version of the survey for centre directors and a different version for program staff

You Bet We Still Care! - Survey Findings

Target population

- *You Bet We Still Care!* was targeted to **1,000 employers** and **4,000 employees** in full-day, centre-based child care for children aged 0 to 6 years
- For purposes of this research, the “employer” was defined as the person with overall responsibility for child care administration and human resources, such as hiring and managing staff and setting workplace policy and standards. It was recognized that this person may be an executive director, director, supervisor, administrator, owner, First Nations Band Council, or Board of Directors.
- “Employees” were defined as all permanent and temporary staff on a centre’s payroll, who regularly worked with children or provided supervision for those who work with children.
- The two surveys were programmed so that “employers” who were also centre directors of one or more centre also received questions from the employee survey, and respondents to the employee survey, who were also centre directors, received questions from the employer survey.
- Multiple versions of the survey were sent to different segments of the target population (i.e., there was one version of the survey for centre directors and a different version for program staff).
- The main difference between the employer and the employee survey was that the questions were different in their content, but there was some overlap between the two surveys since some employers were also centre directors, and some employees had responsibilities for hiring. Survey skip functions allowed us to include some employer questions for certain employees and some employee questions for certain employers.
- Employer questions asked about centre characteristics, hiring practices, recruitment challenges, fees and financial status of the centre.
- Employee questions asked about previous experiences in the child care sector, job satisfaction, wages and benefits, plans for future employment, education/training, participation in professional development, organizational membership and demographic information.
- It was anticipated that centre directors may have responded to either the employer or the employee survey, depending on the governance model of the centre. Therefore, each survey asked specific questions of centre directors.

Timeline and key activities

- Late 2011 to May, 2012: Survey development and ethics review
- May to June, 2012: Pretest of survey
- July to September, 2012: Online survey open
- October 2012 to December 2012: Data cleaning and analysis
- December 2012 to January 2013: Dissemination of survey results

You Bet We Still Care! - Survey Findings

Timeline and key activities

Reference period: July 16 to September 30, 2012 (11 weeks)

- Available on the CCHRSC's website and promoted with the help of provincial/territorial child care organizations.
- Closing date was extended until the end of September in order to maximize the response rate and accommodate those employers and employees who may not have been able to access the survey during the summer months

Project timeline

- **Summer to Fall 2011:** Tendering process; Hire research team; Steering Committee; Project launch
- **Nov 2011 to March 2012:** Situational analysis
- **March to May 2012:** Survey development and programing; Research Ethics Board approval
- **April 2011 to September 2012:** Research team: ongoing communication and collaboration with PT officials, child care organizations; CCHRSC: ongoing promotion of the survey
- **May to June 2012:** Pretest, revise, refine surveys
- **July 2012:** Survey launched; On-line until September 30
- **October-November 2012:** Data cleaning; Data sorting; Preparation of frequencies
- **November 2012:** Summary of key findings; Limited analysis; Preparation of summary report
- **December 2012 and beyond:** Preparation of public data set and methodological considerations for future analysis

Survey dissemination and data collection

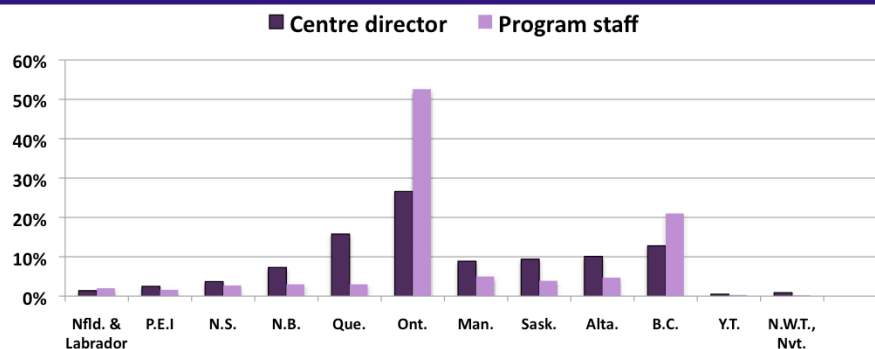
- Online survey conducted from July to September 2012
- Direct emails with survey link were sent to target population
- York University's Institute for Social Research (ISR) used Computer-assisted Survey Execution System (CASES)
 - Hosted and administered the survey
 - Data stored on their servers

You Bet We Still Care! - Survey Findings

Survey dissemination and data collection

- Online survey conducted from July 2012 to September 2012 (survey reference period)
- York University's Institute for Social Research (ISR) used Computer-assisted Survey Execution System (CASES) to host and administer the online survey; data stored on ISR's servers
 - Link for centre directors' survey was open due to an initial low response
- Initially, an email was sent to every centre for which an email address was available, along with a unique ID and password
- An open link for employees was created; information about the employee open link was circulated via employers, CCHRSC bulletins, provincial/territorial child care organizations, labour unions, and provincial/territorial governments
- As additional email addresses became available, it was necessary to create an open link for employers in order to allow expanded access; ID and passwords were not necessary for the employer open link
- Email and address list was compiled primarily by working with provincial/territorial officials, child care organizations, and through supplementary Google/Web searches
- Direct mail providing the link to the survey was sent by CCHRSC to those without an email address
- Regular reminders sent
- Publicized through social media (Facebook, Twitter, LinkedIn)
- Engagement through an email account for trouble-shooting and questions (flanaganbeach@gmail.com)
- Articles about the survey published in sector newsletters and publications
- The survey was reviewed and approved by the Research Ethics Board at York University

Distribution of responses



Total of 4,625 completed surveys

- 1,145 responses from employers
- 3,480 responses from employees

These included responses from 2,344 program staff, 1,427 centre directors and 437 administrators and owners who did not work directly at a centre

You Bet We Still Care! - Survey Findings

Distribution of responses

- The graph demonstrates the provincial/territorial distribution of survey responses
- Total of 7,000 emails were sent to child care centres
 - Responses from incomplete surveys were not included in the analysis
 - Over 400 respondents who were outside of the target population were also excluded
 - Individual email follow ups were done in cases where it was uncertain whether or not the respondent was within the target population or not
- Total of 4,625 respondents who administered or worked in programs who fell within the target population completed surveys
 - The employer survey had 1,145 responses
 - The responses from each province and territory as a percentage of the total responses were similar to *You Bet I Care!* (1998), with the exception of Saskatchewan which was considerably higher, and Nova Scotia, which was lower.
 - The employee survey had 3,480 responses
 - Ontario was overrepresented
 - Quebec underrepresented
- Respondents of the employee survey included First Nations/Inuit/Metis (4.1%) and members of visible minorities (5.4%). The majority of respondents were white/Caucasian (86.5%).

Response rate

An accurate response rate for the survey is not available because it is unknown how many people actually received the survey.



Characteristics of Child Care Centre

Child Care Centre Characteristics

- Quick facts
- Child care centre policies
- Quality improvement activities
- Governance / business models
- Types of child care offered in addition to full-day child care
- Languages of operation
- Parent fees
- Spaces
- Staff-to-child ratio

Quick facts

- Median years in operation of all respondent centres is 20 years
- 55% operated at least one program in addition to operating a full-day child care
- 50% of centres have one or more child who has been identified as having special need
- 40% of centres have staff whose primary job is to support inclusion
- 42% of centres are operated by an organization that runs one or more other centre(s)

You Bet We Still Care! - Survey Findings

Quick facts

- Median years in operation of all respondent centres is 20 years
- 55% operated programs in addition to full-day child care
- 50% of centres have one or more child with identified special need
- 40% of centres have staff whose primary job is to support inclusion
- 77.4% of centres are located in urban areas
- 19.3 % of centres are located in rural areas

Human Resource (HR) practices

In terms of the policies of child care centres,

- 83% have a policy and/or procedures manual;
- 71% have written job descriptions;
- 51% conduct regular, written performance appraisals;
- 4% of child care centres do none of the above.

You Bet We Still Care! - Survey Findings

Quick facts

- 83% of child care centres have a policy and/or procedures manual
- 71% of child care centres have written job descriptions
- 51% of child care centres conduct regular, written performance appraisals
- 4% of child care centres do none of the above
- Most centres have at least one of these practices

Quality improvement activities

Employers undertook a number of quality improvement measures, including

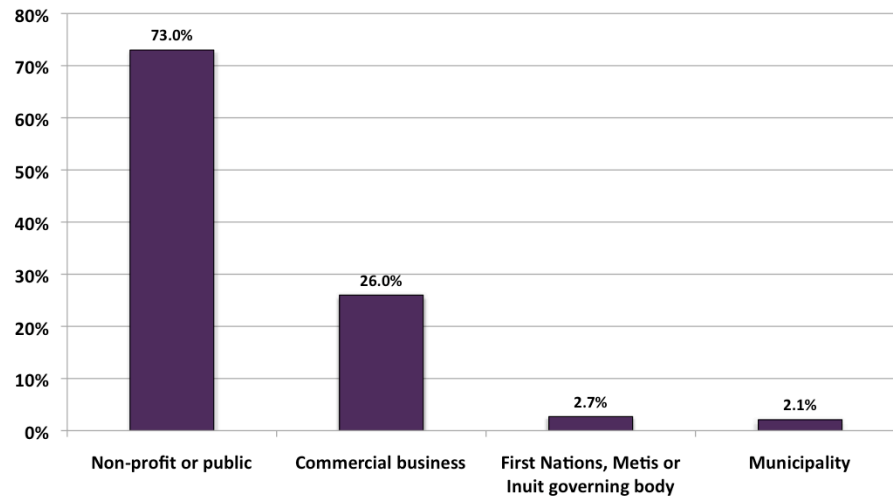
- introducing a new curriculum (57%);
- conducting an external quality assessment (44%);
- conducting a quality self-assessment (46%);
- conducting staff training on inclusion (45%);
- providing a mentorship program for staff (26%).

You Bet We Still Care! - Survey Findings

Quick facts

- Some measures were mandatory (provincial/territorial regulation or policy) and some were voluntary
- 57.3% introduction of a new curriculum / early learning framework
- 43.7% conduct an external assessment of quality that provided results and suggestions for improvement
- 45.9% conduct a self-assessment of quality using a standardized measure
- 44.8% conduct staff training on inclusion
- 26.1% provide a mentorship program for staff
- 14.5% do none of the above

Governance / business model



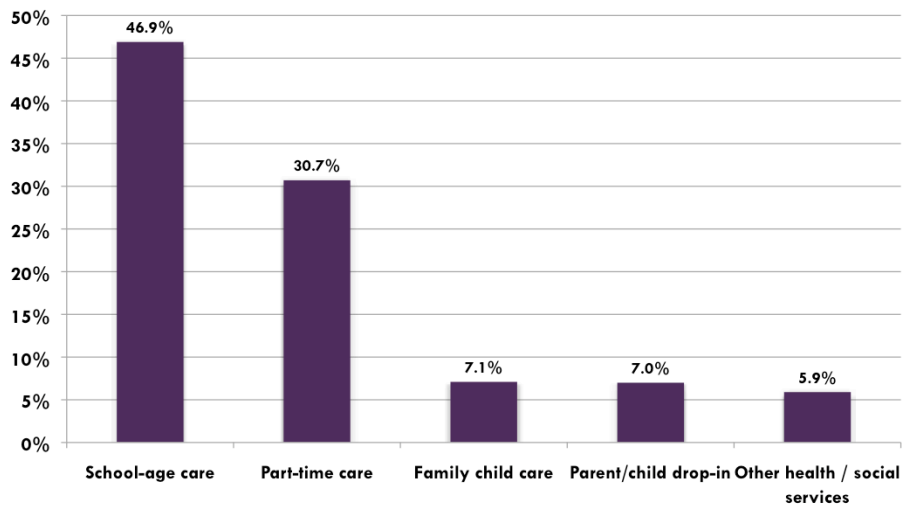
You Bet We Still Care! - Survey Findings

- 73.0% operate under a non-profit or public model;
- 26.0% operate as a commercial business;
- 2.7% are governed by a First Nations, Metis or Inuit governing body; and
- 2.1% are governed by a municipality.

Single and Multiple Centres

- 58% of centres were run by an organization that operated one child care centre serving children 0-6
- 42% of centres are run by an organization that operated more than one centre
 - 339 centre directors who are responsible for 963 centres
 - Most multi-site centre directors only run two centres
 - The largest multi-site centre runs 91 centres
 - 29% of multi-site centre directors plan to expand their operations in the next three year
- 73% of employers operated one or more public or non-profit centres, including those run by parent and community boards, cooperatives, municipalities and First Nations governing bodies.
- 25.8% of employers operated one or more centres as a business, including as sole proprietors, partnerships, corporations and franchises.
- 31% of non-profit organizations and 20.9% of commercial operators held a licence for more than one centre for children 0-6

Types of child care offered by centres in addition to full-day child care



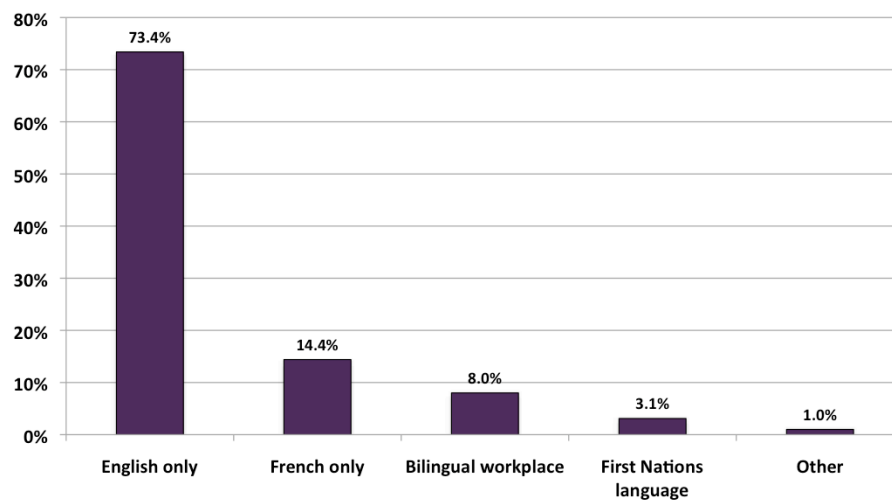
You Bet We Still Care! - Survey Findings

Quick facts

More than half the employers (54.5%) operated at least one program in addition to full-day child care for children 0-6.

- 46.9% provided school age care.
- 30.7% provided part-time child care.
- 7% offered parent/caregiver and child drop in programs.
- 5.9% operated regulated family child care.
- 7.1% offered a range of other health and social service programs
- 6.3% of centre directors who operate one centre offered three or more additional services; compared with 15.9% of centre directors with with more than one centre.

Languages of operation



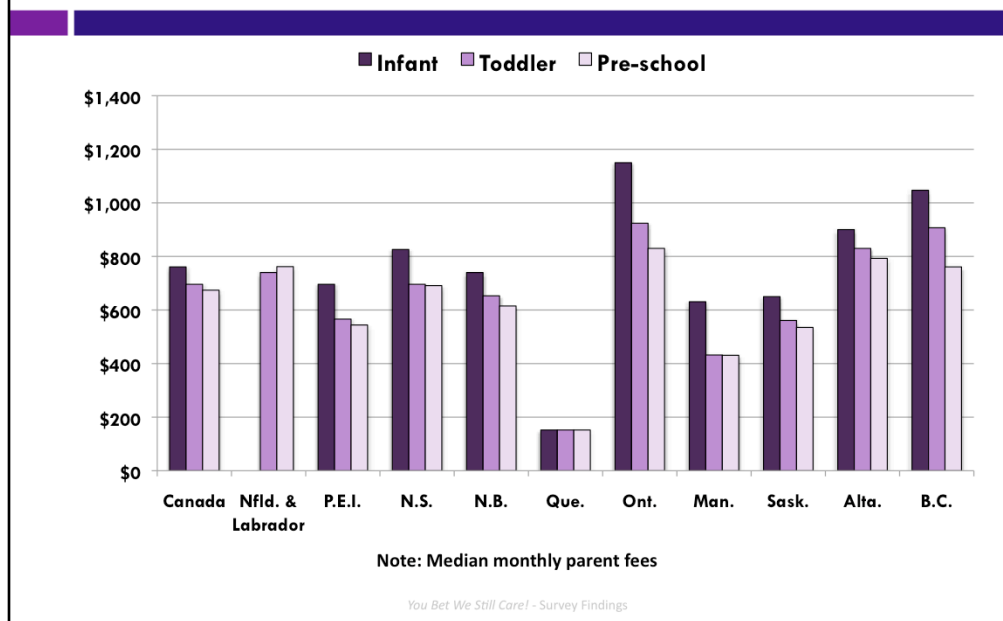
You Bet We Still Care! - Survey Findings

Quick facts

When asked which language is usually spoken in their centre employers replied that

- 73.4% of centres operate in English only;
- 14.4% of centres operate in French only;
- 8.0% of centres have a bilingual workplace;
- 3.1% of centres operate in a First Nations language; and
- 1.0% of centres said that they operate in an “Other” language.

Parent fees



Quick facts

- The highest fees are in Ontario; the lowest are in Quebec
- After adjusting for inflation, fees were higher than they were in 1998 in all provinces except Quebec and Manitoba, where they decreased for all age groups.
 - Fees in Quebec were approximately 75% lower in 2012 than in 1998
 - Fees in Manitoba were between 12% and 18% lower, depending on the age group
- The greatest fee increases between 1998 and 2012 in both percentage and dollar increases for toddlers and preschool age care were in Newfoundland and Labrador, and Alberta.
 - Preschool-age fees increased by 58% and \$230/month in Alberta (in adjusted dollars).
- Fees have increased significantly beyond the cost of living (except in Manitoba and Quebec)

Breakdown: Median monthly parent fees

	Infant	Toddler	Pre-school
Canada	\$761	\$696	\$674
Nfld. & Lab.	-	\$740	\$762
P.E.I.	\$696	\$566	\$544
N.S.	\$826	\$696	\$691
N.B.	\$740	\$653	\$615
Que.	\$152	\$152	\$152
Ont.	\$1,150	\$924	\$830
Man.	\$631	\$432	\$431
Sask.	\$650	\$561	\$535
Alta.	\$900	\$830	\$793
B.C.	\$1,047	\$907	\$761

Notes: To ensure confidentiality, infant fees for Nfld. & Labrador are excluded due to the small number responses.

Due to the low number of responses from the each of the territories, territorial-specific data is not include. However, the data from the territories is included in the total for Canada.

Spaces

- Median centre size: 50 spaces
- Average centre size: 62 spaces
- In the past three years
 - 27% of centres increased their number of spaces
 - Less than 1% decreased their number of spaces
- In the next three years
 - 20% of centres plan to increase their number of spaces
 - Less than 1% expect to decrease their number of spaces
 - 16% plan to open one or more other centres
 - 19% plan to change the age groups to which they provide their services

You Bet We Still Care! - Survey Findings

Quick facts

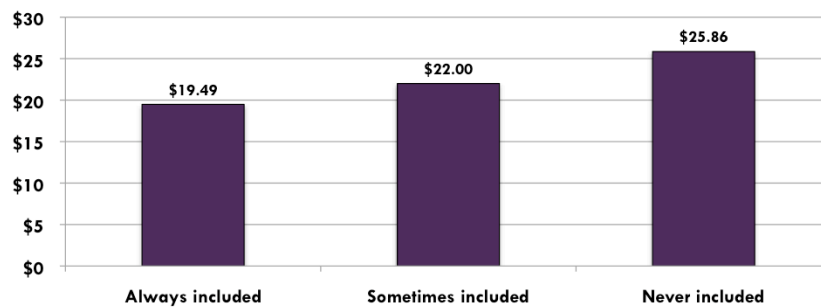
- Median centre size: 50 spaces
 - Smallest is located in BC (median of 25 spaces); the largest is located in Ontario (median of 62)
 - Largest centre in the sample was licensed for 180 spaces)
- In the past three years
 - 27% increased spaces (by a median 19 spaces)
 - Fewer than 1% decreased spaces
- In the next three years
 - 20% plan to increase spaces, ranging from an increase of 3 spaces to 75 spaces
 - Fewer than 1% expect to decrease number of spaces
 - 16% plan to open one or more centres
 - 19% plan to change age groups to which they provide their services

Staff-to-child ratio

When are centre directors counted in the staff-to-child ratio?

- 27% are always included in the ratio
- 48% are sometimes included in the ratio
- 25% are never included in the ratio

How does working in the ratio affect centre directors' hourly wages?



You Bet We Still Care! - Survey Findings

Quick facts

Ratios vary from province to province and territory to territory

When are centre directors counted in the staff-to-child ratio?

- 27.2% are counted in ratio all of the time
- 47.6% are counted in ratio part of the time
- 25.1% are never included in the ratio

How does working in the ratio affect centre directors' wages?

Where centre directors are always included in the ratio, the median hourly wage is \$19.49

Where centre directors are sometimes included in the ratio, the median hourly wage is \$22.00

Where centre directors are never included in the ratio, the median hourly wage is \$25.86



Characteristics of Child Care Staff

You Bet We Still Care! - Survey Results

Child Care Staff Characteristics

- Quick facts
- Sex
- Age
- Mother tongue
- Employment patterns
- Post-secondary ECE education
- Benefits
- Wages
- Wages of program staff, by level of education
- Wages of program staff, 1998 and 2012

Note: The following section includes information on both program staff and centre directors (some of whom may also be centre owners).

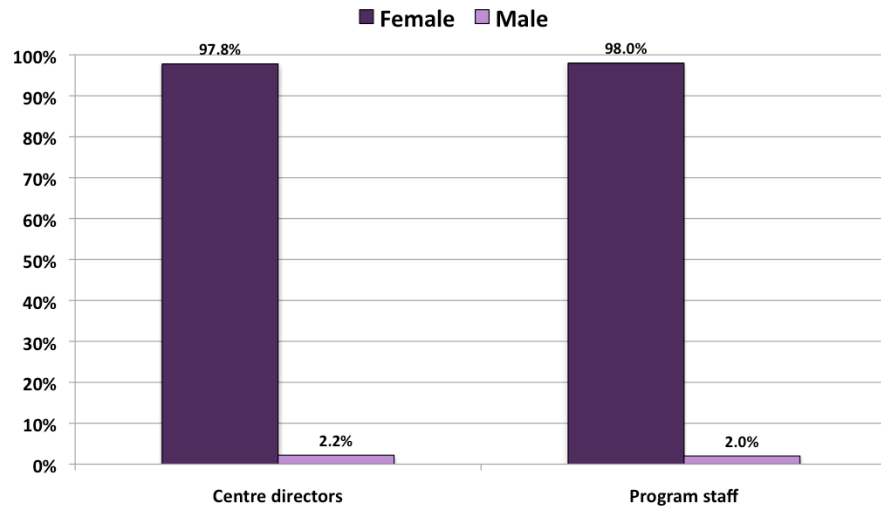
Quick facts

- The majority of program staff were born in Canada. Another 12.8% were born in other countries, but are now Canadian citizens; less than 5% were permanent residents, on work visas, or other types of arrangements.
- The majority of centre directors (87%) were born in Canada. Almost 10% were born in other countries, but are now Canadian citizens; less than 5% were permanent residents, on work visas, or other types of arrangements.
- Centre director respondents included First Nations/Inuit/Metis (5.7%) and members of visible minorities (2.1%). The majority of respondents were white/Caucasian (87%).

You Bet We Still Care! - Survey Findings

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- Centre director respondents included First Nations/Inuit/Metis (5.7%) and members of visible minorities (2.1%). The majority of respondents were white/Caucasian (87%).

Sex



You Bet We Still Care! - Survey Findings

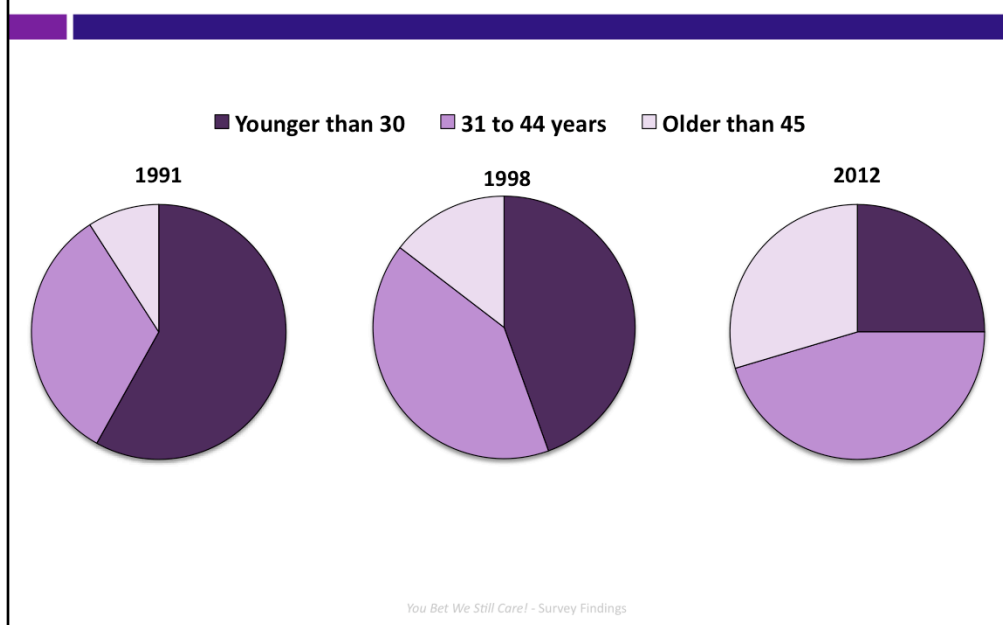
Quick facts

- The overwhelming majority of staff are female

Breakdown: Sex

	Directors	Program Staff
Female	97.8%	98.0%
Male	2.2%	2.0%

Age of program staff



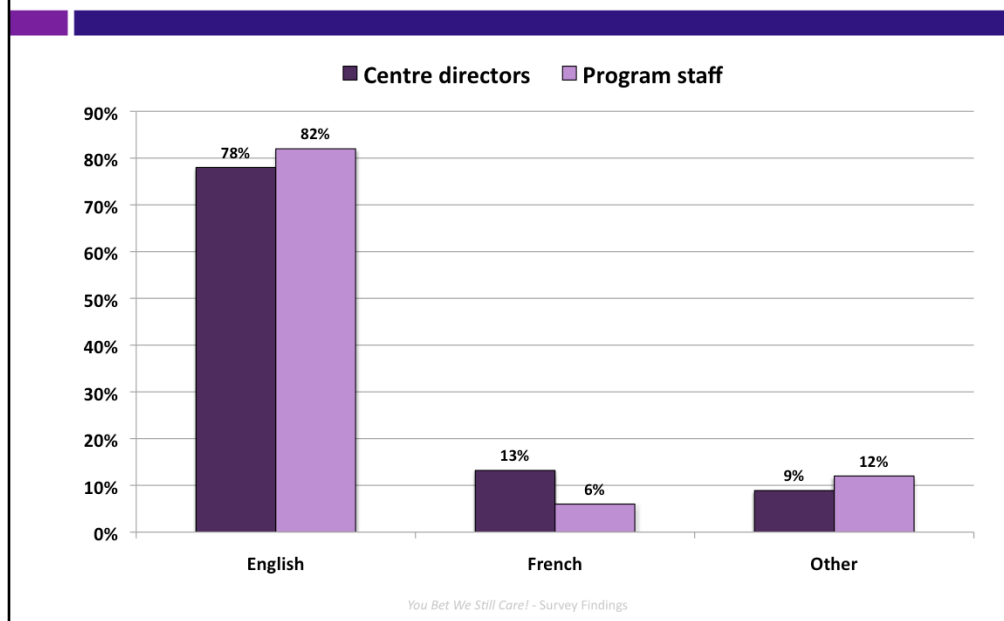
Quick facts

- The sector is ageing; this trend mirrors the current trend in other professions and is not unique to the child care sector
- The proportion of the workforce that is younger than 30 is shrinking
- The proportion of the workforce that is older than 45 is growing
- Oldest female is 71; oldest male is 63

Breakdown: Age

	1991	1998	2012
Younger than 30 years	58.1%	44.5%	25.0%
From 31 to 44 years	32.8%	40.9%	45.4%
Older than 45 years	9.1%	14.6%	29.6%

Mother tongue



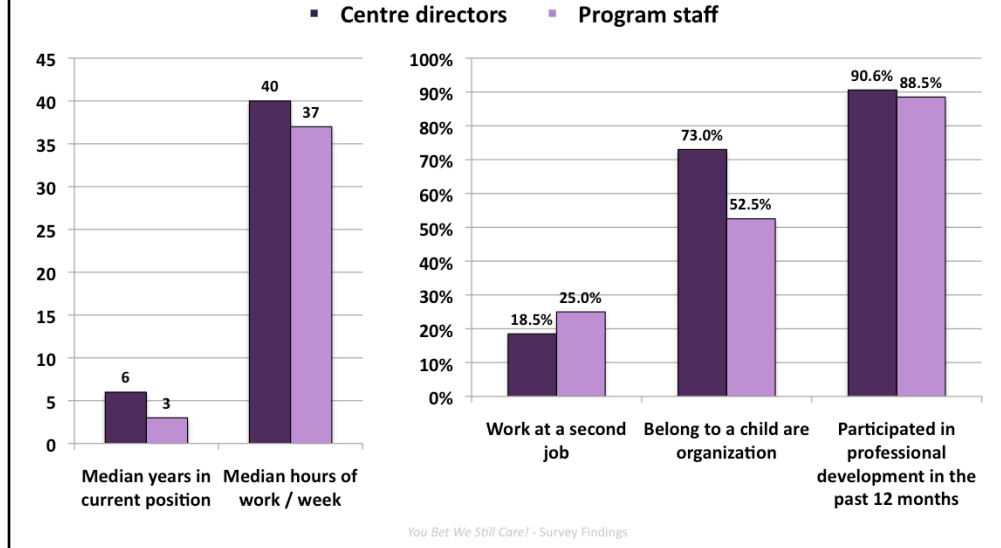
Quick facts

- The question asked was “When you were growing up, what language was most commonly spoken in your home?”
- Most child care staff’s first language is English

Breakdown: First language

	CDs	PS
English	78%	82%
French	13%	6%
Other	9%	12%

Employment patterns



Quick facts

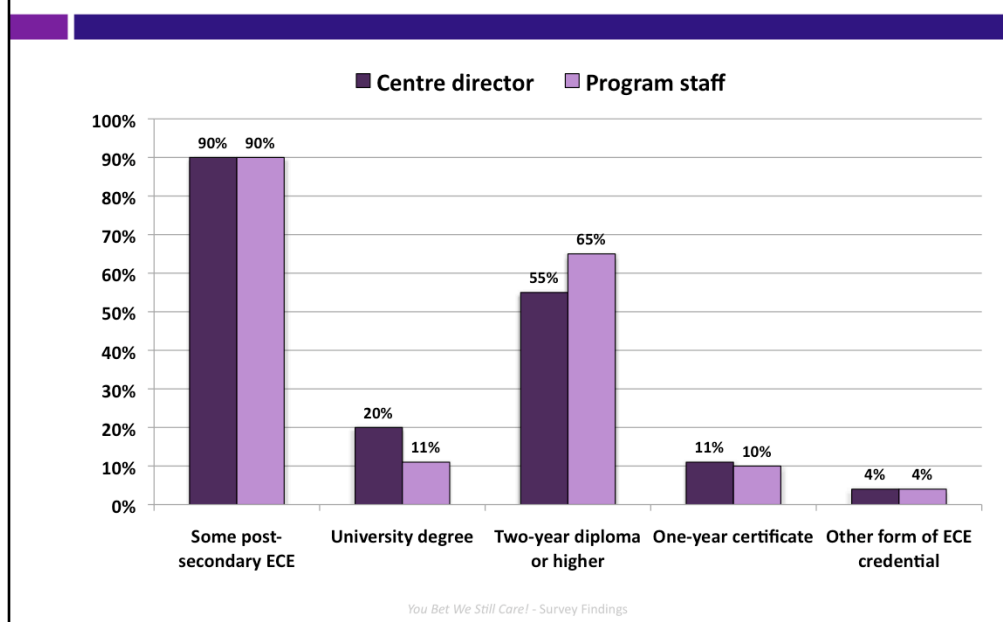
- Median number of years for centre directors in their current position is 6; compared to a median of 3 years in their current position for program staff
- Median hours of work per week for centre directors is 40; compared to a median of 37 hours of work per week for program staff
- 91.5% of centre directors worked five days per week; compared to 88.5% of program staff work five days per week
- Median number of years in the sector for program staff is 10 years (average 12 years)
- The majority of program staff (59.8%) are working in the same position as when they started
- 21.5% of program staff work in a unionized centre
- 18.5% of centre directors worked at a second job; compared to 25% of program staff
 - Second jobs were primarily on a part-time basis with a median of 10.5 weeks per year for centre directors and 15 weeks per year for program staff.
 - Main reason for working a second job was the need for additional income
- 73.0% of centre directors belong to a child care organization; compared to 52.5% of program staff
- 90.6% of centre directors participated in professional development in past 12 months; compared to 88.5% of program staff.
 - The main reason for participating in professional development was to keep current in their field
- 63% of centre directors have more than 15 years in the sector
- 10% of centre directors have been working in their current position for 21 years or more

Breakdown: Selected employment patterns

	Median years in current position	Median hours of work / week
Employers	6	40
Employees	3	37

	CDs	PS
Work at a second job	18.5%	25.0%
Belong to a child care organization	73.0%	52.5%
Participated in PD in the past 12 months	90.6%	88.5%

Post-secondary ECE education



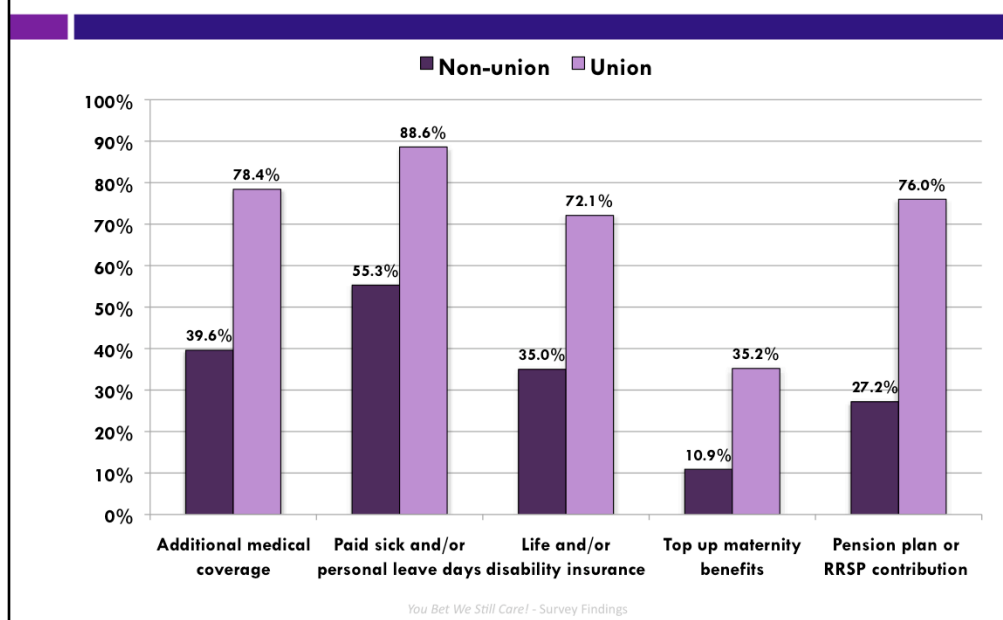
Quick facts

- Most, but not all, staff have completed some form of post-secondary education directly related to ECE
- Most common form of post-secondary education for both centre directors and program staff is a college credential
- 10% of centre directors and 10% of program staff do not have any post-secondary ECE education
- Almost 95% of respondents with early childhood education reported that they obtained their highest ECE credential in the province or territory where they lived.

Breakdown: Post-secondary ECE education

	CDs	PS
Some post-secondary	90%	90%
University degree	20%	11%
Two-year or more diploma	55%	65%
One-year certificate	11%	10%
Other form of credential	4%	4%
No post-secondary		

Benefits



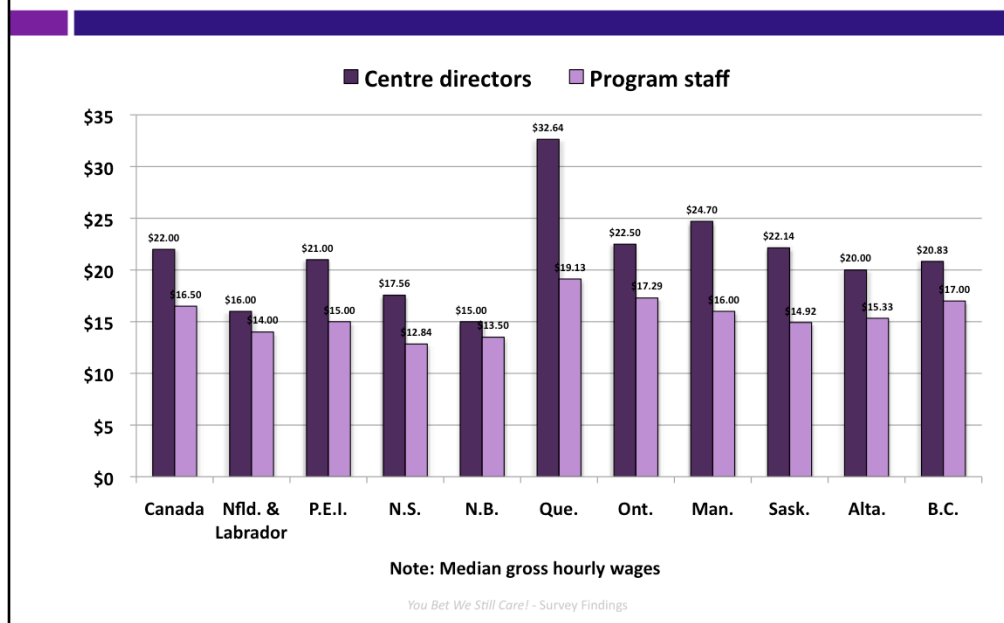
Quick facts

- Between 1998 and 2012, there were both gains and losses in the percentage of program staff who had access to benefits and worked in centres with well-defined human resource (HR) practices in place
- Overall, with the exception of pension plans and RRSP contributions, a lower percentage of staff had access to a number of key benefits that they did in 1998 (such as extended medical coverage and paid sick days)
- However, there was a significant gap between unionized and non-unionized staff (e.g., 72% of unionized staff have access to life and/or disability insurance, compared to 35% of non-unionized staff)

Breakdown: Benefits

	Non-union	Union
Medical coverage	39.6	78.4
Paid sick or personal leave	55.3	88.6
Life/disability insurance	35.0	72.1
Top up maternity benefits	10.9	35.2
Pension plan or RRSP contribution	27.2	76.0

Wages



Quick facts

- 76% of centre directors and 78.5% of program staff have received a wage increase in the last three years
- The wages of both centre directors and program staff were higher in unionized centres

Breakdown: Median gross hourly wages

	CDs	PS
Canada	\$22.00	\$16.50
Nfld.&Lab	\$16.00	\$14.00
P.E.I.	\$21.00	\$15.00
N.S.	\$17.56	\$12.84
N.B.	\$15.00	\$13.50
Que.	\$32.64	\$19.13
Ont.	\$22.50	\$17.29
Man.	\$24.70	\$16.00
Sask.	\$22.14	\$14.92
Alta.	\$20.00	\$15.33
B.C.	\$20.83	\$17.00

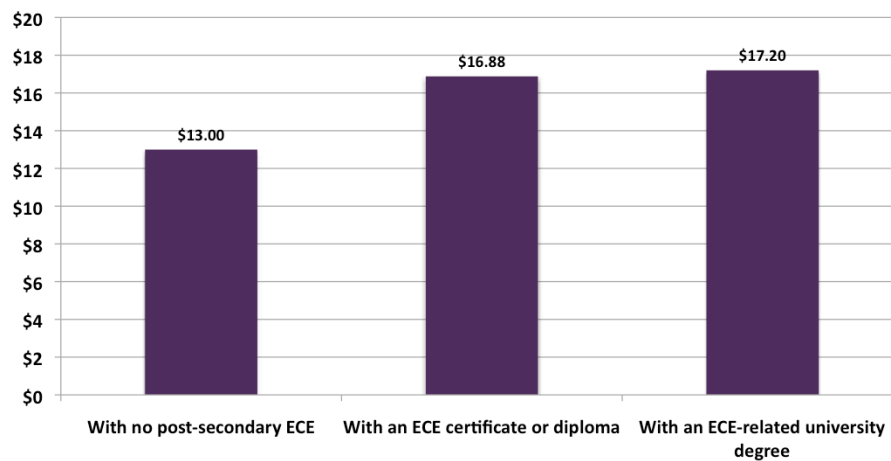
Notes

Median: The middle point

Gross: Without tax or other contributions having been deducted

Due to the low number of responses from the each of the territories, territorial-specific data is not include. However, the data from the territories is included in the total for Canada.

Wages of program staff, by level of education



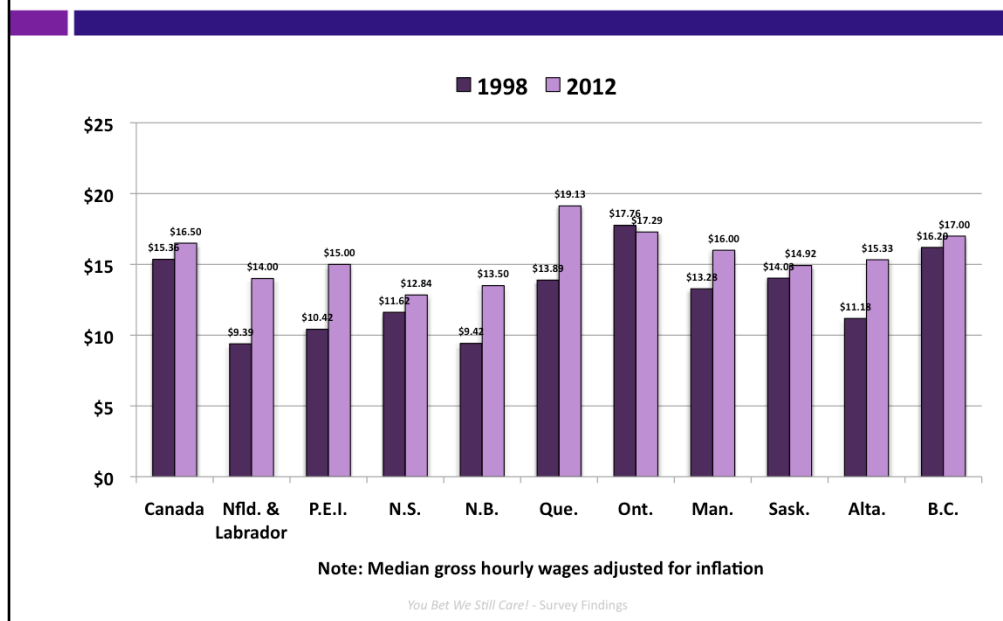
Note: Median gross hourly wages

You Bet We Still Care! - Survey Findings

Quick facts

- Education levels affect the wages of program staff;
 - More education equals higher wages
- Program staff with
 - no post-secondary ECE: \$13.00
 - an ECE certificate or diploma: \$16.88
 - an ECE-related degree: \$17.20

Wages of program staff, 1998 and 2012



Quick facts

- In 1998, the average hourly wage for a centre director was \$16.49; compared with \$11.48 for program staff
 - Adjusted for inflation, in 2012, those wages would have increased to \$22.05 and \$15.36, respectively
- Adjusted for inflation, program staff saw real increases in their wages in all provinces except Ontario, where there was a decrease of 2.7%
 - However, Ontario wages remained among the highest in the country
- Wages increased, in real terms, more than 40% in Newfoundland and Labrador (49.1%), Prince Edward Island (43.9%), and New Brunswick (43.4%).
- In 1998, the highest median wages were 88% higher than the lowest; in 2012 the gap had been reduced to 35%.

Breakdown: Hourly wages for program staff 1998 and 2012, adjusted for inflation (2012 dollars)

	1998	2012
Canada	\$15.36	\$16.50
Nfld.&Lab.	\$9.39	\$14.00
P.E.I.	\$10.42	\$15.00
N.S.	\$11.62	\$12.84
N.B.	\$9.42	\$13.50
Que.	\$13.89	\$19.13
Ont.	\$17.76	\$17.29
Man.	\$13.28	\$16.00
Sask.	\$14.03	\$14.92
Alta.	\$11.18	\$15.33
B.C.	\$16.20	\$17.00

Note: Due to the low number of responses from the each of the territories, territorial-specific data is not include. However, the data from the territories is included in the total for Canada.



Recruitment and Retention

Recruitment and Retention

- Recruitment challenges
- Coping with recruitment challenges

Recruitment challenges

Centre directors found the following recruitment challenges 'relevant' or 'very relevant':

- Applicants' lack of skills (65%)
- Few or no applicants (65%)
- Applicants' lack of related work experience (60%)
- Lack of money for recruitment (45%)
- Applicant not satisfied with salary (43%)
- Lack of time to recruit (36%)

You Bet We Still Care! - Survey Findings

Quick facts

- Competition from the school system was more of a challenge in Ontario than in other provinces and territories, with 76% of employers in Ontario (compared to 40% across the rest of the country) reporting competition from the school system as a relevant or very relevant challenge.
- Centre directors found the following recruitment challenges 'relevant' or 'very relevant':
 - 65% applicants' lack of skills
 - 65% few or no applicants
 - 60% applicants' lack of related work experience
 - 45% lack of money for recruitment
 - 43% applicant not satisfied with salary
 - 36% lack of time to recruit
- 10.8% of centre directors reported that it took more than six months to fill a position for a qualified program staff
- 13.2% of centre directors took more than six months to fill a supervisory position

Coping with recruitment challenges

Of the proportion of centre directors who could not find qualified staff to fill a vacancy,

- 63% hired a less qualified applicant;
- 50% re-advertised the job position;
- 40% shared the extra responsibilities among the existing staff;
- 33% transferred internally; and
- 12% reduced the number of spaces in their centre.

You Bet We Still Care! - Survey Findings

Quick facts

- Quite a few centres are operating without the required number of trained staff
- About 63% of centre directors reported recruitment challenges

- The most common course of action for centre directors who could not find qualified staff to fill a vacancy was to hire a less qualified applicant
- Of the proportion of centre directors who could not find qualified staff to fill a vacancy,
 - about 63% hired a less qualified applicant;
 - about 50% re-advertised the job position;
 - about 40% shared the extra responsibilities among the existing staff;
 - about 33% transferred internally;
 - about 12% reduced the number of spaces in their centre; and
 - about 9% cited 'Other' courses of action.

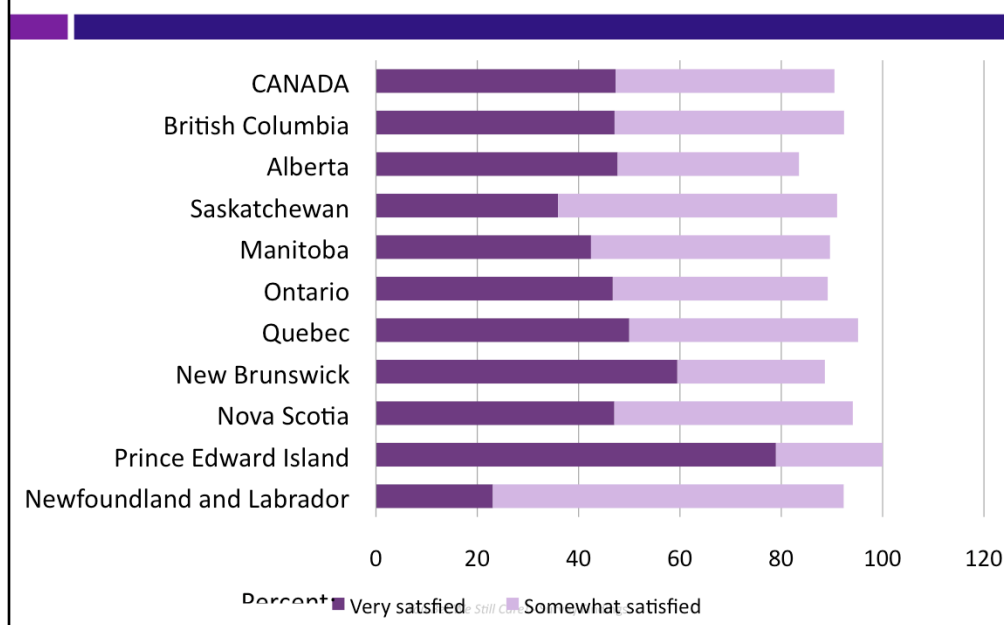


Job Satisfaction

Job Satisfaction

- Job satisfaction of centre directors
- Job satisfaction of program staff
- Aspects of job satisfaction of program staff
- Plans of program staff who plan on staying in child care
- Plans of program staff who plan on leaving child care
- Proportion of centre directors and program staff looking for a new job
- Main reasons for looking for a new job

Job satisfaction of centre directors



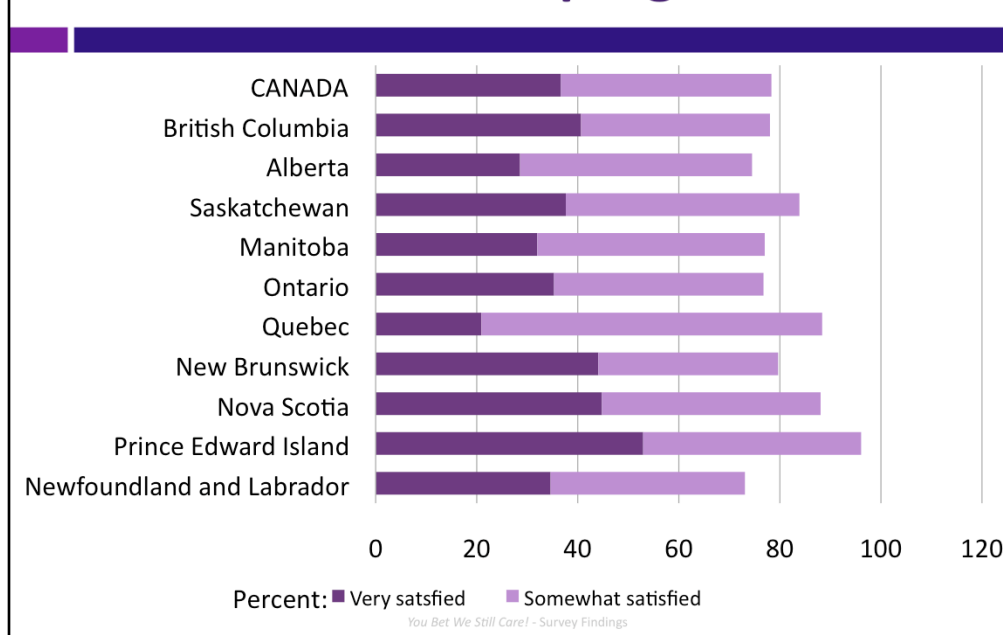
Quick facts

- Centre directors generally have higher rates of job satisfaction than program staff in specific aspects of their work, including their sense of accomplishment, (91% vs. 84%); viewing their work as stimulating (91% vs. 81%); and being in control (79% vs. 61%) of aspects of their work that impact job satisfaction.
- Prince Edward Island reported the highest rate of job satisfaction for centre directors, followed by New Brunswick
- After wages, people feeling they had control over their job was the greatest cause of job satisfaction
- Centre directors reported an overall rate of job satisfaction at 90.5% - significantly higher than the 78.3% reported by program staff.

Breakdown: Job satisfaction of centre directors

	Very satisfied	Somewhat satisfied
Canada	47.3%	43.2%
Nfld.&Lab.	23.1%	69.2%
P.E.I.	79.0%	21.1%
N.S.	47.1%	47.1%
N.B.	59.5%	29.1%
Que.	50.0%	45.2%
Ont.	46.8%	42.4%
Man.	42.5%	47.2%
Sask.	36.0%	55.1%
Alta.	47.7%	35.8%
B.C.	47.1%	45.3%

Job satisfaction of program staff



Quick facts

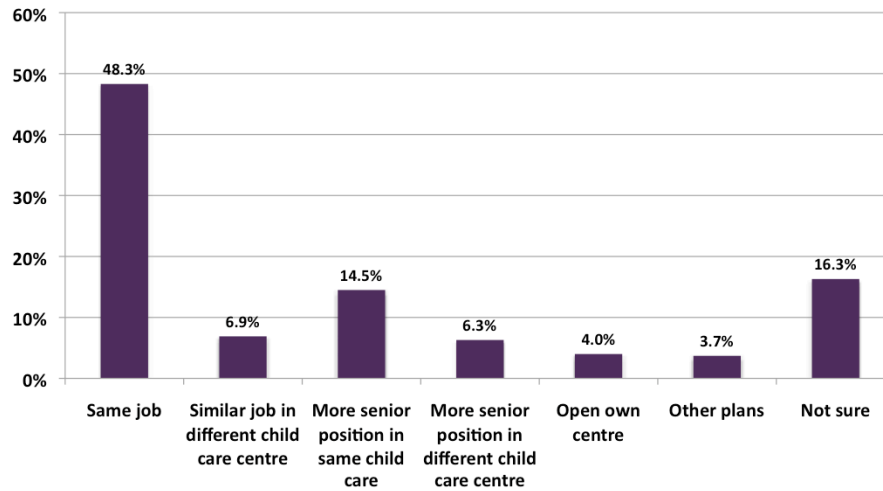
- Program staff employed in single-site programs reported higher rates of job satisfaction (81.3%) than those who work in centres operated by organizations or individuals who hold more than one license (75.3%)
- Overall, program staff in unionized centres reported higher levels of job satisfaction, but this varies by province/territory. In some jurisdictions, program staff reported higher satisfaction levels in non-unionized centres.
- Prince Edward Island reported the highest rate of job satisfaction for program staff, followed by Nova Scotia, and Saskatchewan
- Note that the number of responses from Quebec is very low and should be used with caution

Breakdown: Job satisfaction of program staff

	Very satisfied	Somewhat satisfied
Canada	36.7%	41.7%
Nfld	34.6%	38.5%
P.E.I.	52.9%	43.1%
N.S.	44.8%	43.3%
N.B.	44.1%	35.6%
Que.	20.9%	67.4%
Ont.	35.3%	41.5%
Man.	32.0%	45.0%
Sask.	37.6%	46.2%
Alta.	28.6%	45.9%
B.C.	40.7%	37.4%

Note: Due to the low number of responses from the each of the territories, territorial-specific data is not include. However, the data from the territories is included in the total for Canada.

Plans of program staff who plan on staying in child care



Note: Program staff intending on working in regulated child care in three years

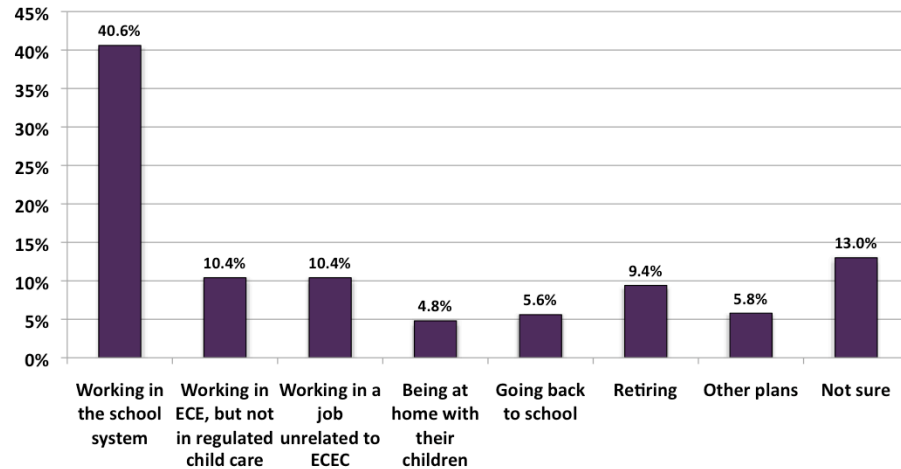
You Bet We Still Care! - Survey Findings

Quick facts

- About 75% of program staff said they still plan to be working in regulated child care in three years. Of this 75% (i.e., only of those intending to still be working in regulated child care in the three years),
- 48.3% plan to be in the same job
- 6.9% plan to be in a similar job, but in a different child care centre from the one they currently work in
- 14.5% plan to be in a more senior position in the same child care centre they currently work in
- 6.3% plan to be in a more senior position, but in a different child care centre from the one they currently work in
- 4.0% plan to open their own centre
- 3.7% cited 'other' plans
- 16.3% of program staff intending to be working in regulated child care in three years were not sure where they would be working

Note: Program staff intending on working in regulated child care in three years

Plans of program staff who plan on leaving child care



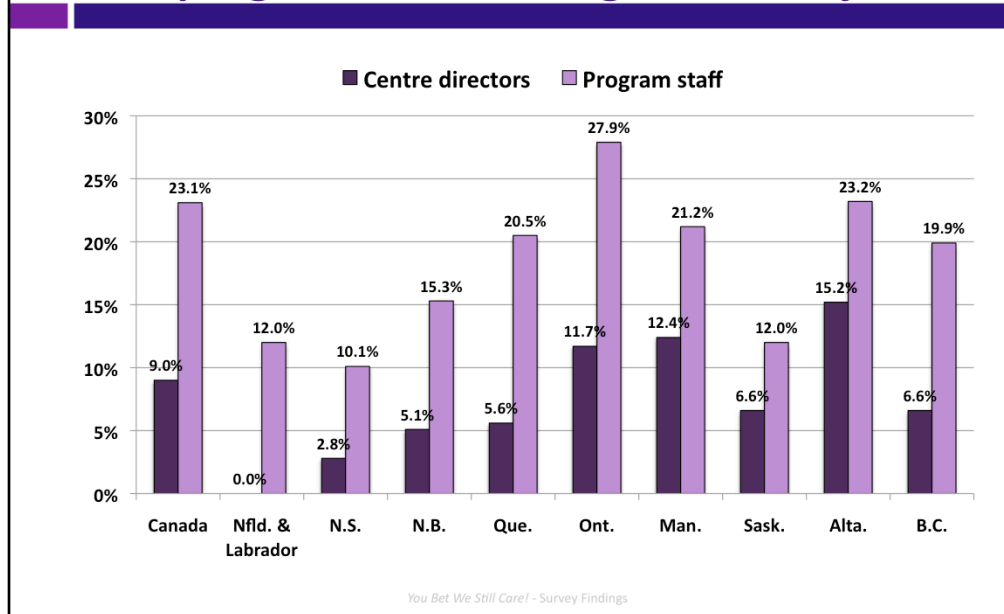
Note: Program staff intending on leaving regulated child care in the next three years

You Bet We Still Care! - Survey Findings

Quick facts

- 40.6% plan on being in the school system;
 - 70% of people from Ontario plan on being in the school system, compared to about 26% of people in the rest of the country;
- 10.4% plan on working in early childhood education (ECE), but not in regulated child care;
- 10.4% plan on working in a job that is unrelated to early childhood education and care (ECEC);
- 4.8% plan on being at home with their children;
- 5.6% plan on going back to school;
- 9.4% plan on retiring;
- 5.8% cited 'other' plans;
- 13.0% of program staff intending on leaving regulated child care in the next three years were not sure where they would be working.

Proportion of centre directors and program staff looking for a new job



Quick facts

- Alberta reported the highest proportion of centre directors looking for a new job, followed by Manitoba, and Saskatchewan
- Ontario reported the highest proportion of program staff looking for a new job

Breakdown: Proportion of centre directors and program staff looking for a new job

	CDs	PS
Canada	9.0%	23.1%
Nfld.&Lab.	0.0%	12.0%
P.E.I.	-	-
N.S.	2.8%	10.1%
N.B.	5.1%	15.3%
Que.	5.6%	20.5%
Ont.	11.7%	27.9%
Man.	12.4%	21.2%
Sask.	6.6%	12.0%
Alta.	15.2%	23.2%
B.C.	6.6%	19.9%

Notes: Data for Prince Edward Island is not included because the data is not statistically significant. Due to the low number of responses from the each of the territories, territorial-specific data is not include. However, the data from the territories is included in the total for Canada.

Main reasons for looking for a new job

1. Looking for higher pay (25%)
2. Wanting career advancement (21%)
3. Dissatisfied with the workplace (20%)
4. Want a job in ECE, but not child care (9%)
5. Want to work with a different age group (8%)
6. Moving to another town or city (5%)
7. Want a job that is unrelated to ECEC (4%)
8. Want better benefits (3%)

You Bet We Still Care! - Survey Findings

Quick facts

- About 23% of all survey respondents are looking for another job
 - 25% are looking for higher pay
 - 21% are looking for a new job is to advance their career
 - 20% are dissatisfied with the workplace
 - 9% want a job in early childhood education (ECE), but not child care
 - 8% want to work with a different age group
 - 5% are moving to another town or city
 - 4% want a job that is unrelated to early childhood education and care (ECEC)
 - 3% want better benefits
 - 13% reported 'Other' reasons



Conclusions and Next Steps

Conclusions and Next Steps

- Survey challenges
- Summary of survey findings
- More research is needed...

Summary of survey findings

Based on this survey's findings, some general conclusions can be drawn:

- Program staff and directors have more education and experience than those in the 1998 study
- The workforce is aging, and retirements can be expected
- Approximately 40% of all child care centres are operated by organizations holding more than one child care license
- Wages are increasing but challenges remain
- Parent fees have increased even after adjusting for inflation
- Job satisfaction is high
- Education makes a difference
- Unionized centres had higher wages and more benefits

You Bet We Still Care! - Survey Findings

Summary points

- Program staff and directors have more education and experience than those in the 1998 study
- The workforce is aging, and retirements can be expected
- Approximately 40% of all child care centres are operated by organizations holding more than one child care license
- Wages are increasing but challenges remain
- Parent fees have increased even after adjusting for inflation
- Job satisfaction is high
- Education makes a difference
- Unionized centres had higher wages and more benefits
- Recruitment and retention of qualified staff and directors continue to be challenges for many employers
- Centre directors and program staff report high rates of job satisfaction
- Levels of job satisfaction in 2012 are consistent with earlier findings
- The majority of program staff who do not intend to be working in the regulated child care sector in three years plan to be working in the school system

Survey challenges

- Developing standard terminology that would be applicable to all respondents (i.e., sector-specific terminology varies from province to province)
- Compiling an e-mail contact list for survey dissemination to the target population (i.e., a master list did not exist)
- Reaching respondents via online surveys only (i.e., no print surveys were produced and mailed)
- Language barriers in the North
- Low response rate from Quebec

You Bet We Still Care! - Survey Findings

Survey development challenges

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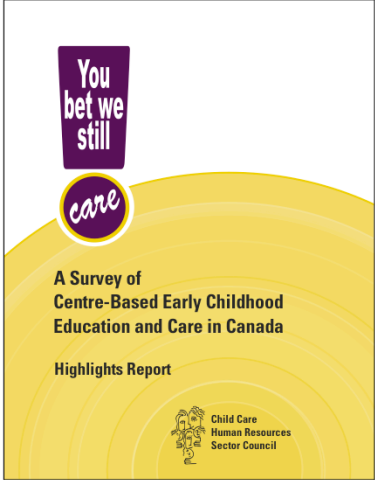
More research is needed...

- Difficult to draw many in-depth conclusions due to lack of funding for further research and analysis
- Need for ongoing, systematic data collection; availability of data on the child care sector remains inadequate
- Data set available through York University's Institute for Social Research (ISR) in April 2014
- To benefit from findings, more research is needed...

You Bet We Still Care! - Survey Findings

More research is needed...

- The data set will be available through York University's Institute for Social Research (ISR) in April 2014 (<http://www.isr.yorku.ca/contact/index.html>)
- Difficult to draw many in-depth conclusions due to lack of funding for further research and analysis.
- Need for ongoing, systematic data collection; availability of data on the child care sector remains inadequate
- To benefit from *You Bet We Still Care!*'s findings, more research is needed...



You bet we still care!

**A Survey of
Centre-Based Early Childhood
Education and Care in Canada**

Highlights Report

Child Care
Human Resources
Sector Council

**For more information
on the survey or to
download the
You Bet We Still Care!
Highlights Report visit:
www.ccsc-cssge.ca**

For more Information ...

- The *You Bet We Still Care! Highlights Report* contains recommendations for future research topics that may be addressed by this survey's dataset
- The data will be housed at York University and will be made available publicly in 2014.
- For more information on how to access the data, visit www.ccsc-cssge.ca