

**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**

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You Bet We Still Care!

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

Issued also in French under the title: Une enquête auprès des services éducatifs et de garde à l'enfance offerts en garderie et en centre de la petite enfance au Canada : Résumé et faits saillants

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Consultants: Kathleen Flanagan and Associates

Authors: Kathleen Flanagan, Jane Beach and Petr Varmuza

Translation: Jocelyne Tougas

Layout: Kim Nelson Design

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Canada

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INTRODUCTION

ABOUT THE SURVEY: *YOU BET WE STILL CARE!* (2012)

In 2009, the Child Care Human Resources Sector Council (CCHRSC) formed an expert panel to provide input on the development of a *Labour Market Information Research Agenda*. Conducting a survey of employers and employees working in the early childhood education and care (ECEC) sector was identified as a top priority.

This key recommendation was put into action by the CCHRSC in 2011. The CCHRSC worked with a research team led by Kathleen Flanagan and Jane Beach in partnership with the Institute for Social Research at York University to undertake the survey project, called *You BetWe Still Care!*. A steering committee was established to guide and support the work of the project. The members of the *You BetWe Still Care!* steering committee brought a wealth of expertise and experience from the ECEC sector in the areas of research, government, and child care administration. A complete list of members is on page 33.

The *You BetWe Still Care!* survey is the first time in over a decade that data on wages, working conditions, and human resource issues in regulated child care centres has been collected. Building on similar Canadian research studies *Caring for a Living* (1991) and *You Bet I Care!* (1998), *You BetWe Still Care!* (2012) contributes to a long-term picture of human resources for the early childhood education and care (ECEC) sector in Canada.

The survey's findings will provide employers and policy makers with essential data that can be used to address human resources challenges such as recruitment and retention, training and professional development, opportunities for career advancement and job satisfaction.

While the ECEC sector in Canada is comprised of a diverse range of programs and services,¹ this study concentrated on employers, directors, and program staff in full-time (i.e., six consecutive hours or more per day, five days per week) child care centres across Canada that were licensed by provincial or territorial governments, and that provided full-time spaces for infants, toddlers, and/or preschool age children.

THE RESEARCH APPROACH

With approval from the Project Steering Committee, the research team confirmed the following research questions:

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?
 - How have these characteristics changed since the *You Bet I Care* study in 1998?
 - Are there trends 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?

¹ The College of Early Childhood Educators (Ontario) defines Early Childhood Education as “professional practice which includes the assessment and promotion of the well-being and holistic development of children through the planning and delivery of inclusive play-based learning and care programs within the context of diverse family, school and community groups.” (College of Early Childhood Educators, 2011, p.29)
In Canada, the delivery of such practice in each province and territory takes place in a variety of settings that typically would include centre-based child care, family child care, before and after school age programs, preschool, kindergarten, family resource programs, early intervention, and other community based programs for children.

This report provides data and some analysis on the first two questions, and outlines recommendations for future research (page 29). Further analysis may be conducted by accessing the *You Bet We Still Care!* public data set that will be housed at the Institute for Social Research, York University, Toronto, Canada as of April 2014.

THE ECEC LANDSCAPE: 1998 – 2012

There have been significant changes in Canada's ECEC sector since the 1998 *You Bet I Care!* study was carried out. Key informants and focus group participants identified significant program and policy changes since that time that have impacted human resources, and include:

- Introduction of provincial/territorial (PT) policy and funding initiatives that influence human resources, including wage subsidies, educational support, bursaries and incentives, and revised policies regarding recognition of post-secondary early childhood credentials.
- Increasing involvement and oversight of ECEC programs from ministries of education.
- Introduction of early childhood curriculum frameworks.
- Increased support for human resources from national bodies such as the Child Care Human Resources Sector Council and from national / provincial / territorial early childhood organizations.
- Changing relationships between child care centres and school based kindergarten programs.

A NOTE ABOUT THE CHILD CARE HUMAN RESOURCES SECTOR COUNCIL (CCHRSC)

The Child Care Human Resources Sector Council (CCHRSC) operated from 2003 – 2013. The only pan-Canadian organization dedicated to moving forward on human resources (HR) issues in Canada's early childhood education and care sector, the CCHRSC brought together national partners and other sector representatives to help develop a confident, knowledgeable, skilled, and respected workforce valued from its contribution to early childhood education and care. The CCHRSC's goals were to:

- Build and share knowledge to advance HR and labour market issues;
- Create tools to promote good HR management practices;
- Foster the development of a skilled workforce;
- Provide leadership and coordination on HR issues; and
- Engage sector stakeholders to ensure a comprehensive, coordinated and responsive approach.

Although the CCHRSC dissolved in 2013 following changes to HRSDC's Sector Council Program, including the elimination of core funding to all councils, the organization contributed much to the sector throughout its ten year history. From developing more collaborative ways of working together to conducting major research studies and creating HR tools, the CCHRSC leaves an extensive legacy of resources that can be used for years to come. Visit www.ccsc-cssge.ca to access the many tools and resources created over the years.

METHODOLOGY

SURVEY DESIGN

The *You Bet We Still Care!* research study included two distinct survey instruments: the Employer Survey and the Employee Survey. Both on-line surveys were hosted at the Institute for Social Research (York University, Ontario, Canada) using the Computer-Assisted Survey Execution System (CASES).

As much as possible, the surveys replicated questions used for the 1998 *You Bet I Care!* survey and the 1991 *Caring for A Living* survey. Additional questions were developed based on results of focus groups and key informant interviews. The surveys were conducted in English and in French.

SURVEY SAMPLE

The *You Bet We Still Care!* population sample included all licensed full-day child care centres in Canada that provided spaces for infants, toddlers, and/or preschool age children. All centres in this “population sample” were invited to participate. The survey sample did not include family child care providers, employers/staff in half-day or part-time programs, or employers/staff in school age only programs.

For the Employer Survey, the research team worked with provincial and territorial (PT) government offices to develop a data base of licensed, full-day child care centres with email addresses. Email addresses were obtained for employers with help from PT governments, PT organizations, and internet searches. An email was sent to every centre for which an email address was available, inviting their participation in the survey, and providing an ID number and unique password. Additional employers identified after the initial directory of employers was established were invited to participate using an open link to the survey, which did not require an ID number or a unique password. The CCHRSC mailed letters to those centres without available email addresses, and invited them to contact the research team in order to participate in the survey.

For the Employee Survey, an open link was created that allowed employees to access the survey. This link was communicated to staff by their employers, and/or through activities promoted by the CCHRSC, PT governments, relevant labour unions, and both national and PT organizations.

ETHICS REVIEW

The surveys were reviewed and approved by the Research Ethics Board at York University.

DEFINING EMPLOYERS AND EMPLOYEES

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 centres also received questions from the employee survey, and respondents to the employee survey who were also centre directors received questions from the employer survey.

SURVEY INCENTIVE

Each respondent who completed the survey was eligible to submit her/his name to win an iPad. One iPad was available for each survey.

DATA COLLECTION PERIOD

The surveys were launched during the week of July 16, 2012, and were available on the Institute for Social Research website for 11 weeks until September 30, 2012.

MATCHED SURVEY DESIGN

The *You Bet We Still Care!* (2012) survey was designed as a matched survey, in order that employees' responses regarding job satisfaction could be analyzed according to the human resource policies and practices as reported by their employer. For this reason, employees were asked to provide the name of the centre where they worked, and the postal code.

One of the limitations to the data for this research concerns the relatively small number of "matched" survey responses. In the majority of cases, employers and employees from the same centre did not respond. As a result, analysis of research questions 3 and 4 have not been carried out for this report; however, the research team has proposed recommendations for such future research (see Future Research, page 24).

REPRESENTATIVENESS OF THE SAMPLE

The on-line approach to the *You Bet We Still Care!* survey did not allow for a representative sample. Some jurisdictions were not able to provide a comprehensive list of full-day child care programs with the specific age groups for children younger than school age. Not all centre employers have email addresses. It was not possible to determine the number of full- and part-time employees that work in full-day child care centres, nor to have email addresses for all employees.

While it was not possible to determine the number of people who are employed in full-time licensed child care centres, estimations were made about the relative proportion of people working in full-time child care centres by considering the relative "size" of this portion of the licensed ECEC sector.

Approximately half of all spaces in the licensed/regulated child care sector are in full- and part-time centre based programs.² Another 35% of spaces are in school-age programs, and 15% are in family child care homes (Public Investments in Early Childhood Education and Care, 2010, Table 4).

REPORTING ON THE DATA

Median is the numeric point that divides one half of the population from the other.

- Unless otherwise indicated, data has been reported using the median.
- In many instances, data is also provided for the 25th and 75th percentiles.
- The median is better suited to wide distributions of data in order to report a central tendency. It is considered a more reliable and robust measure.

Mean – or average – is calculated by adding the total value of responses and dividing by the number of respondents.

- Calculation of the mean is appropriate when the sample of respondents are more alike than not.
- However, the mean is easily influenced by "outliers" – values that are numerically distant from the rest of the data.

² It is not possible to disaggregate full and part-time spaces, due to variations in provincial territorial data reporting.

While the methodological approach for *You Bet We Still Care!* precluded the development of a representative sample, analysis of the data indicates that survey respondents in both employer and employee surveys are in fact representative of child care centres across Canada with respect to language, auspice, and the proportion of centres that are operated by organizations that hold more than one license:

- 42% of centres operated by an organization with more than one centre
- 54.5% operated programs in addition to full-day child care
- 73% non-profit and public; 26% commercial
- 77.4% of employers in urban centres, 19.3% in rural centres
- 2.7% First Nations, Métis, Inuit governing body; 2.1% municipally operated

WHO WAS INVITED?

The project objective was to gather responses from 1,000 employers and 4,000 employees working in full-day, licensed child care centres that provided spaces for infants, toddlers, and/or preschool age children.

The research team identified and contacted approximately 6,500 employers with email addresses. The employer survey was directed to administrators in both single-site centres and multi-site organizations; centre owner/directors in single-site centres, and executive directors in multi-site organizations. The employee survey was directed to centre directors in both single and multi-site organizations, program staff and inclusion staff.

WHO RESPONDED TO THE SURVEY?

In total, the researchers received usable surveys from 1,145 employers, who were responsible for 1,769 centres, and from 3,480 employees, including assistants, program staff, supervisors and centre directors.

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. In total, 1,427 (on-site) centre directors and another 437 owners and administrators (off-site) responded to the survey.

LIMITATIONS OF THE STUDY

Although the research has provided valuable information regarding human resources in the full-day child care centre workforce, there are limitations to the study. Such limitations include:

- The on-line nature of the survey meant that only those employers with available email addresses could be invited to participate.
- The on-line nature of the survey meant that only those with access to a computer were able to participate.
- The provincial and territorial databases varied in the type of licensing information provided. While every effort was made to remove ineligible centre types from the database before the survey invitations were released, it was not possible to identify them all. As a result, it was challenging to determine if a centre received the email, self-selected out if they did not meet the criteria, or if they completed it.
- The level of computer literacy skills of those working in full-day child care centres impacted their ability to navigate the survey website and complete the survey.

- The open link to the on-line survey meant that the researchers were not able to control access to the survey itself. Extensive data cleaning has helped to control for ineligible responses and eliminate survey responses from more than 400 respondents working in other parts of the ECEC sector beyond full-day centre-based care for 0-6 year olds.
- Due to the small number of responses from each of the territories, territorial-specific data was not included in the tables in this report. However, the data from the territories was included in the Canada-wide totals.
- Resources for the study did not allow for translation of the survey beyond English and French. This has likely impacted responses from Inuit or First Nations respondents not comfortable in English or French.
- Responses from employers in Québec were low, compared to the proportion of spaces in that province; however they are similar to the overall percentage of responses found in *You Bet I Care!* (1998). Responses from Québec employees are even lower. Therefore, data from Québec must be treated with caution.

PT DISTRIBUTION OF EMPLOYER RESPONSES

	YBWSC EMPLOYER RETURNS (2012)	% OF TOTAL YBWSC EMPLOYER RETURNS (2012)	PT CENTRE-BASED SPACES 0-6 AS A % OF CANADA TOTAL (2012)	YBIC CENTRE RETURNS (1998)	% TOTAL YBIC CENTRE RETURNS (1998)
NEWFOUNDLAND AND LABRADOR	16	1.4	1.1	20	2.4
PRINCE EDWARD ISLAND	28	2.5	0.8	18	2.1
NOVA SCOTIA	42	3.7	2.6	60	7.1
NEW BRUNSWICK	84	7.3	2.0	42	5.0
QUÉBEC	181	15.8	28.4	131	15.4
ONTARIO	306	26.6	36.7	247	29.1
MANITOBA	102	8.9	3.9	76	9.0
SASKATCHEWAN	108	9.4	1.6	40	4.7
ALBERTA	116	10.1	11.3	93	11
BRITISH COLUMBIA	147	12.8	11.1	115	13.6
YUKON TERRITORY	6	0.5	0.2	1	0.1
NORTHWEST TERRITORIES, NUNAVUT	10	0.9	0.2	5	0.6
CANADA	1,145	100	-	848	100

The above table describes the number of employer responses from each province and territory, and explains the percentage of responses from that jurisdiction compared to the total number of responses in the *You Bet We Still Care!* (YBWSC) survey. The percentage of spaces in each jurisdiction compared to Canada as a whole shows how the percentage of PT employer responses relates to the share of 0-6 spaces. For example, although Nova Scotia has 2.6% of all centre-based spaces for 0-6 year olds, they had a higher proportion of employer responses when compared to the total. Likewise, the proportion of employer responses as compared to proportion of spaces is lower for Québec, Ontario, and Alberta. The last two columns describe the number of returns in the 1998 *You Bet I Care!* (YBIC) survey, along with the proportion to the total.

- The significant proportion of full-day licensed child care centres operated by organizations holding more than one license added a level of complexity to the sample. In some cases, these multi-site organizations had one administrator who responded for a large number of centres; in other organizations, each centre director responded for an individual centre.
- Ontario is over-represented in the employee survey.
- Due to the complexity of the survey, it was not launched until July. Although the survey remained open until the end of September, the summer time frame likely impacted the number of responses.

Note: Direct comparisons between *You Bet I Care!* (1998) and *You Bet We Still Care!* (2012) should be treated with caution as different samples and methodologies were used in the two studies.

DATA ANALYSIS

Quantitative data have been analyzed using Stata Data Analysis and Statistical Software. Open-ended questions have been analyzed using NVivo 10.

PROFILE OF PROGRAM STAFF AND DIRECTORS

PROGRAM STAFF

Respondents identified as program staff are typically counted in a centre's child:staff ratio, and include educators, assistants, and inclusion staff.

More than half of the program staff respondents (60.5%) said they worked as part of a team, while another 23.5% worked as the primary lead for a class/group of children.

Approximately 30% of program staff reported they also had some supervisory responsibilities. Of this group, about half supervised within their own classroom, and half had supervisory responsibilities beyond the room where they typically worked.

Employment Patterns

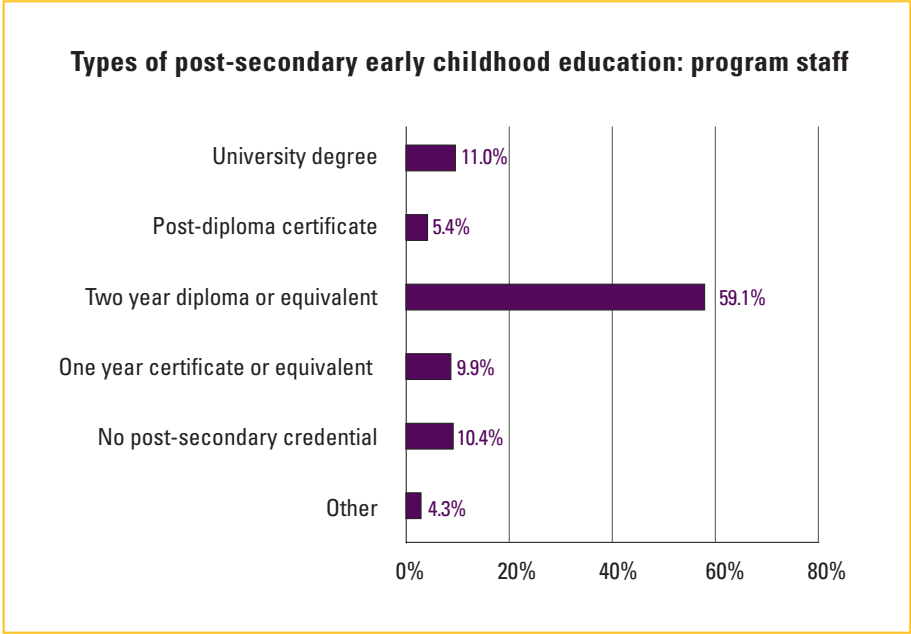
- The vast majority (92.5%) of program staff worked the same number of hours each week. The median number of hours worked per week was 37, and 88.5% of program staff work five days per week.
- The median number of years working for their current employer was four, but 25% had been there for ten years or more, and another 25% had worked for two years or less.
- The majority (59.8%) were working in the same position as when they started. The median number of years in this position was three, although 25% had only been in their position for one year, and another 25% had been in the same position for seven years or more.
- 78.5% have received a wage increase in the last three years.

Education and Experience

On average, program staff respondents had worked in the child care sector for 12 years (median: 10 years); 25% had worked for five years or less, while another 25% had worked for 18 years or more.

89.6% of program staff respondents reported that they held a post-secondary ECE-related credential. 74.4% reported that the highest ECE credential they completed was done at a community college, and 11% received this credential at a university; 4.3% reported some other form of post-secondary ECE credential. Almost 95% of respondents with early childhood education reported that they obtained their highest ECE credential in the province or territory where they lived.

The majority of respondents to the employee survey (59.1%) had completed a two-year ECE diploma. This figure is significantly higher than the 48.2% of program staff with a two-year diploma in ECE as reported in 1998. This increase must be analyzed with consideration of the numerous initiatives introduced in provinces and territories over the last 14 years to support program staff in obtaining a post-secondary credential in ECE. At the same time, the percentage of staff with an ECE two-year diploma varied across provinces and territories, and therefore these figures must be considered within each jurisdictional context.



Professional Development

The majority of program staff respondents (87.9%) participated in some form of professional development in the past twelve months. Program staff reported that the main reason for participating in professional development was to keep current in their field.

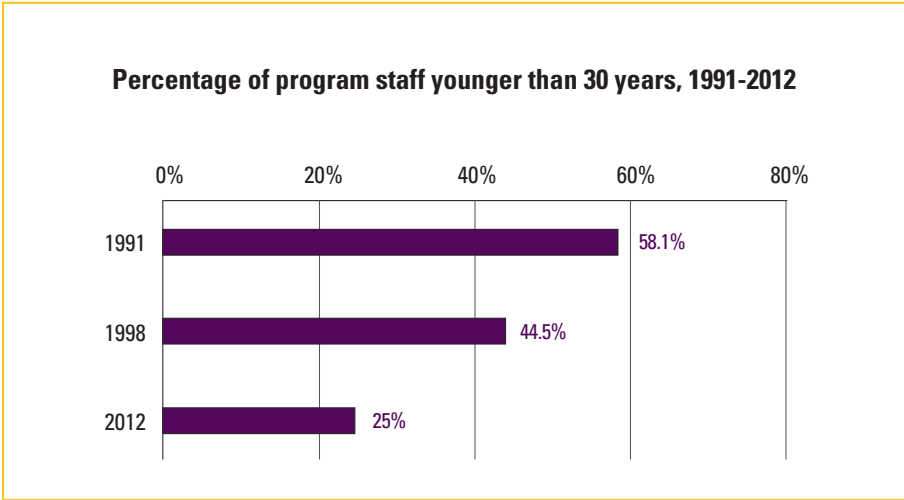
Other Characteristics

- Almost 25% of program staff worked at a second job. The main reason was the need for additional income. These arrangements were primarily on a part-time basis, with a median of 15 weeks per year in the second job.
- Respondents were predominantly female (98.2%).
- 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.
- Respondents included First Nations/Inuit/Métis (4.1%) and members of visible minorities (5.4%). The majority of respondents were white/Caucasian (86.5%).
- English was the mother tongue of a majority of respondents (81.9%). French was the mother tongue of 5.7%, and 12.4% had a mother tongue other than English and French.³

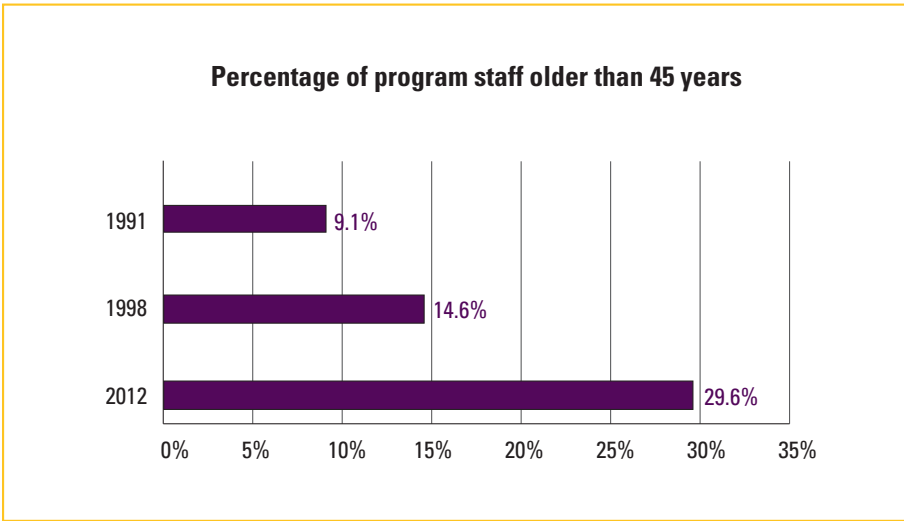
³ Statistics Canada defines mother tongue as “the first language learned at home in childhood and still understood by the person at the time the data was collected.” See: <http://www.statcan.gc.ca/concepts/definitions/language-langue01-eng.htm>

An Aging Workforce

In 2012, the program staff median age was 38 years; a lower percentage of program staff were younger than 30 than the teaching staff in the 1998 *You Bet I Care!* study – where a lower percentage were younger than 30 in the 1991 *Caring For A Living* study:



Similarly, the percentage of program staff respondents in 2012 who are older than 45 years of age has increased since the 1991 and 1998 studies:



CENTRE DIRECTORS

Directors who responded to the *You Bet We Still Care!* survey worked in centre based programs, and may or may not be included in child:staff ratios. Directors may be employees of an organization, or may also be the owner of the centre.

Employment Patterns

- The majority of directors worked the same number of hours each week (89.7%) and worked five days per week (91.5%). The median number of hours worked per week was 40.
- The median number of years working for their current employer was six years – but 25% had been there for 13 years or more, and another 25% had worked for three years or less. Ten per cent had been working in their current position for 21 years or more.
- Approximately 76% of centre directors received a wage increase in the last three years.

Education and Experience

A total of 62.9% of centre director respondents have been working in the ECEC sector for more than 15 years. This was significantly higher than data reported in 1998, when 37.1% of directors had been working in the ECEC sector for more than 15 years. Comparable data was not available from the 1991 *Caring for a Living* study.

The majority (90%) of centre directors who responded to the survey held some type of post-secondary ECE credential:

- 66% held a college credential
- 55% had a two year diploma or higher
- 11% had a one-year certificate
- 20% had a university degree
- 4% had some other form of ECE credential

As was the case with program staff, a majority of centre director respondents (66.3%) obtained their highest ECE specific credential at a community college, and for the majority of those respondents (91.3%), this was in the province/territory where they work. Of those with an ECE credential other than a degree, the majority of respondents (67.4%) completed a two-year ECE diploma.

Professional Development

Directors' participation in professional development activities continued to be as high as was noted in 1998 when 88.5% participated in some form of professional development. In 2012, 90.6% of centre directors participated in professional development in the past 12 months. The main reason for doing so cited by centre director respondents was to keep current in their field.

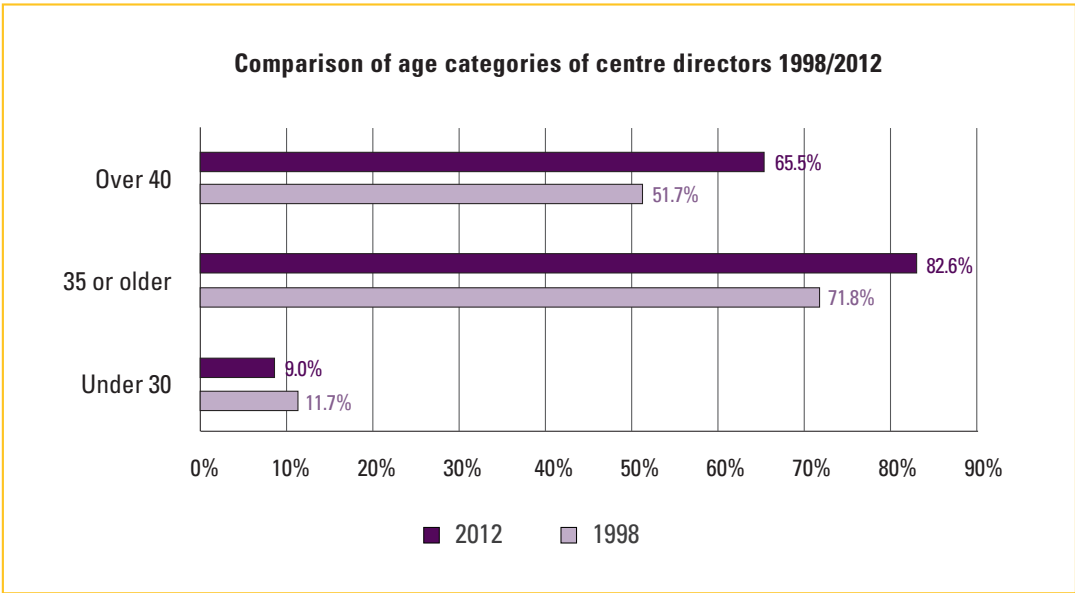
Other Characteristics

- Centre directors were less likely (18.5%) to be employed at a second job than were program staff (25%). Those who did work at a second job said they did so primarily for additional income (42%) or because they enjoyed it (29%), or because they were gaining skills related to ECE (14%).

- Of those with second jobs, the median number of weeks worked per year in the second job was 10.5 weeks per year, and 48% said their hours varied with the season.
- Centre directors were more likely (73%) than program staff (52.5%) to belong to a child care organization.
- 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.
- Respondents included First Nations/Inuit/Métis (5.7%) and members of visible minorities (2.1%). The majority of respondents were white/Caucasian (87%).
- The majority of respondents spoke English growing up (78%). French was spoken by 13.2%, and 8.9% spoke other languages.

An Aging Workforce

In 2012, the median age for centre directors was 45 years. As was the case with program staff, the age range for centre directors in 2012 is higher than the age range for such directors in 1998. Using age categories from the 1998 *You Bet I Care!* survey, there were more directors who responded to the 2012 *You Bet We Still Care!* survey who were over 40 years old, and fewer who were younger than 30 years old. Comparable data was not available for 1991.



PROFILE OF EMPLOYERS AND CENTRES

The *You Bet We Still Care!* survey defined an employer as the person with overall responsibility for child care administration and for human resources issues, such as hiring and managing staff and setting workplace policy and standards. Respondents included executive directors, supervisors, administrators, owners, and members of Boards of Directors. Employers provided information on the centres they operate and about their hiring practices and experiences.

EMPLOYER AND CENTRE CHARACTERISTICS

Child care centres varied in size, delivery model and auspice:

Centre Size

The median centre size was 50 spaces. BC had the smallest median size with 25 spaces and Ontario the largest, with 62. The largest centre in the sample was licensed for 180 spaces.

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 were run by an organization that operated more than one centre.

Many Employers Operate Additional ECE-Related Programs

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

- 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 employers who operate one centre offered three or more additional services, as do 15.9% of employers with more than one centre.

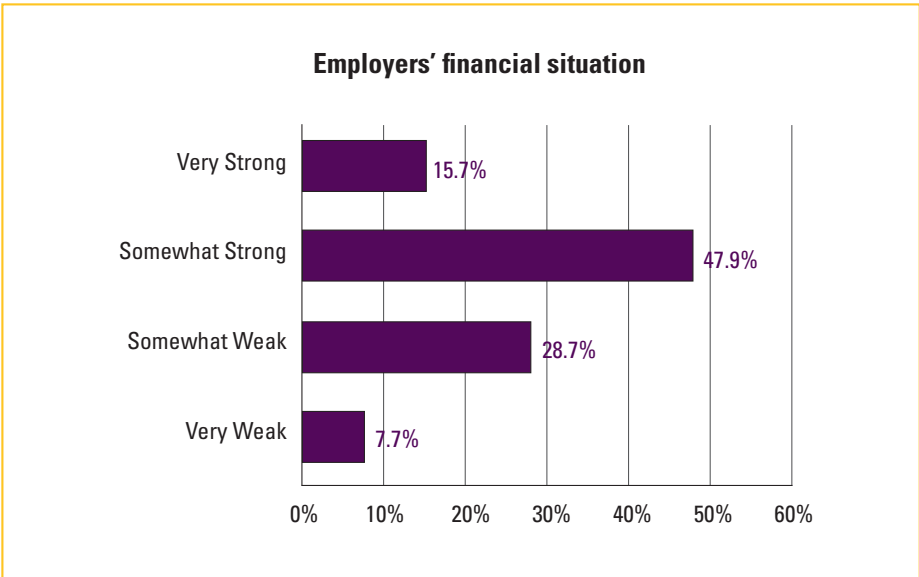
Governance

- 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.⁴
- 31% of non-profit organizations and 20.9% of commercial operators held a licence for more than one centre for children 0-6.

⁴ In this study all types of centres run as a business are referred to as a commercial centre.

Financial Situation

- 63.6% of respondents described their financial situation as somewhat or very strong, and yet many were operating at a loss.
- 28.8% of those who said their finances were somewhat strong and 53.3% of those who said they were somewhat weak reported that they were not breaking even.



Parent Fees

The Canada-wide median monthly fee charged for infant care was \$761, for toddler care \$696 and for preschool age care \$674. Fees varied considerably within and across jurisdictions and age groups. Fees for preschool age children were generally higher in centres that also provided care for infants and toddlers than in those that did not.

- 25% of monthly fees for infants were \$585 or below, for toddlers \$522 or below, and for preschool age \$431 or below.
- 25% of monthly fees for infants were \$1,030 or higher, for toddlers \$902 or higher and for preschool age \$816 or higher.
- After adjusting for inflation, fees were higher than they were in 1998 in all provinces except Québec and Manitoba, where they decreased for all age groups. Fees in Québec were approximately 75% lower in 2012 than in 1998 and in Manitoba between 12%-18% lower, depending on the age group.⁵
- 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 58.2% and \$230/month in Newfoundland and Labrador and 39.5% and \$224/month in Alberta (in adjusted dollars).

⁵ Parental fees have been regulated in Quebec and Manitoba since 1997 and 1987 respectively. In 2010, Prince Edward Island regulated parental fees in all provincially funded Early Years Centres.

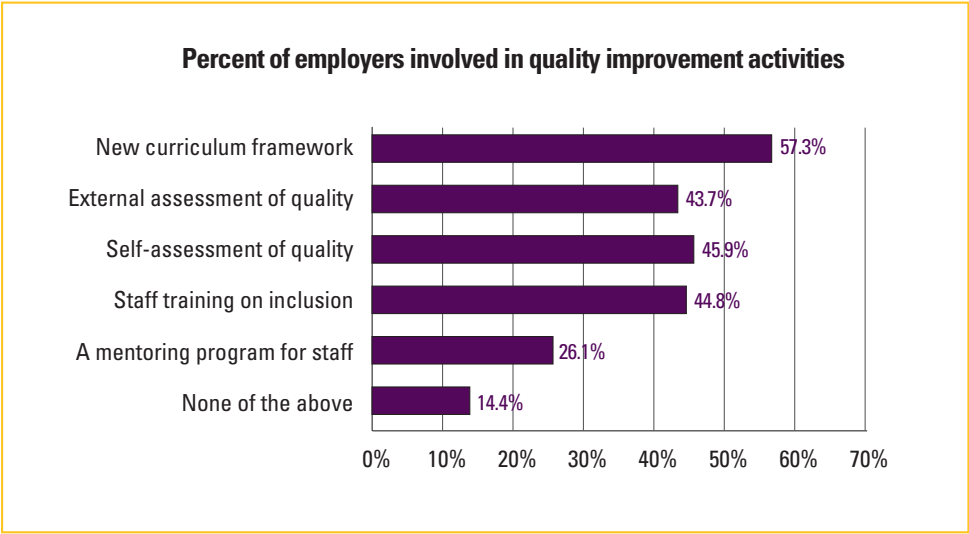
MEDIAN REPORTED PARENT MONTHLY FEES 2012 (\$)			
	INFANT	TODDLER	PRE-SCHOOL
NEWFOUNDLAND AND LABRADOR	-	773	783
PRINCE EDWARD ISLAND	696	566	544
NOVA SCOTIA	825	694	685
NEW BRUNSWICK	740	653	620
QUÉBEC	152	152	152
ONTARIO	1,152	925	835
MANITOBA	631	431	431
SASKATCHEWAN	650	561	535
ALBERTA	900	825	790
BRITISH COLUMBIA	1,047	907	761
CANADA	761	701	674
<i>Note: Due to the very few infant programs in Newfoundland and Labrador, the median reported fees for infants has not been included. The territories are not included due to small sample size.</i>			

Other Characteristics

- English was spoken in 73.4% of centres and French in 14.4%. As well, 8% of centres were bilingual, 3.1% included a First Nations language and 1% spoke another language.
- 49.7% of centres had one child or more with an identified special need and 39.8% had staff whose primary job it was to support inclusion.
- 68.9% of employers regularly have ECE students on practicum placements.
- The median length of time a centre had been in operation was 20 years. 10% had been in operation for 37 years or more, and 10% had been in operation for less than 3 years.
- 27% of employers increased the number of spaces they operate in the past 3 years, with a median increase of 19 spaces; 20.2% plan to increase the number of spaces within the next 3 years - from 3 to more than 75 spaces.
- 6.4% decreased their capacity by a median of 6 spaces; fewer than 1% plan to decrease the number of spaces within the next 3 years.
- Within the next 3 years, 15.5% plan to open one or more centres and 18.5% plan to change the age groups they serve.

QUALITY IMPROVEMENT ACTIVITIES

A number of employers undertook assessments of their programs, provided mentoring and training, and introduced new curriculum frameworks. More than 85% of employers undertook one or more quality-related activities in the past 12 months.



WAGES AND BENEFITS

A SNAPSHOT OF WAGES

You Bet We Still Care! (2012) found a median hourly wage of \$16.50 for program staff and \$22.00 for a program director. For full-time, full-year employment this represents an annual salary of \$30,146 and \$40,194 respectively.

- 25% of all program staff earned below \$14.00 and 25% earned more than \$21.19.
- 25% of all directors earned less than \$18.01 and 25% earned more than \$27.00.

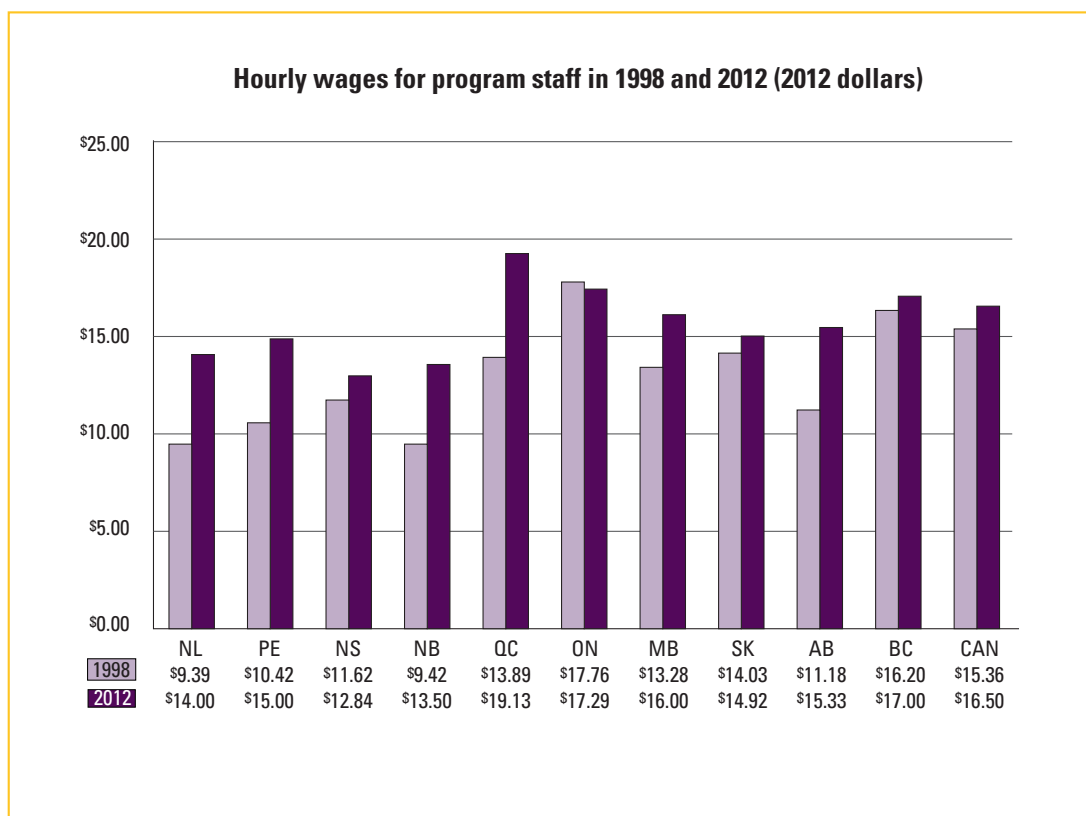
MEDIAN GROSS HOURLY WAGES, 2012		
	PROGRAM STAFF	PROGRAM DIRECTORS
NEWFOUNDLAND AND LABRADOR	\$14.00	\$16.00
PRINCE EDWARD ISLAND	\$15.00	\$21.00
NOVA SCOTIA	\$12.84	\$17.56
NEW BRUNSWICK	\$13.50	\$15.00
QUÉBEC	\$19.13	\$32.64
ONTARIO	\$17.29	\$22.50
MANITOBA	\$16.00	\$24.70
SASKATCHEWAN	\$14.92	\$22.14
ALBERTA	\$15.33	\$20.00
BRITISH COLUMBIA	\$17.00	\$20.83
CANADA	\$16.50	\$22.00
<i>Note: The territories are not included due to small sample size. Figures from Québec should be treated with caution due to low number of respondents.</i>		

Survey findings showed that working with children in the child:staff ratio had a negative impact on directors' salaries. 75% of directors worked at least part of the time in the program with children, and their wages varied accordingly. The median wage for directors:

- Included in the ratio all of the time: \$19.49
- Included in the ratio some of the time: \$22.00
- Not included in the ratio: \$25.86

HOW HAVE WAGES CHANGED?

Findings from *You Bet We Still Care!* (2012) indicate that wages have improved for all, although wages for program staff showed higher increases than those for directors.



In 1998 the average wage for a program staff was \$11.48 and for a director \$16.49. Adjusted for inflation,⁶ those hourly wages would be \$15.36 and \$22.05 in 2012.

- Adjusting for inflation, program staff saw real increases in their wages in all provinces except for Ontario, where there was a decrease of 2.7%. However, Ontario wages remained among the highest in the country.⁷
- Wages increased, in real terms, more than 40% in Newfoundland and Labrador, Prince Edward Island and New Brunswick (49.1%, 43.9% and 43.4% respectively).
- In 2012 the range of wages across provinces was smaller than in 1998. In 1998 the highest median wages were 88% higher than the lowest; in 2012 that had been reduced to 35%.

In 2005, early childhood educators and assistants earned 54% of the average wage for all occupations.⁸ According to the Labour Force Survey estimates (October 2012), the average hourly wage for all employees was \$23.92.⁹ Program staff earned 69% of the average wage and program directors earned 92%.

Overall wages for directors did not increase as much as for program staff. In adjusted dollars, wages decreased 14.8% in Ontario and 6% in British Columbia, and increased 32.1% in Alberta and 25.8% in Saskatchewan.

⁶ The Bank of Canada consumer price index data shows the changes in the cost of a mixed “basket” of consumer purchases, to measure the purchasing power of a dollar over time. See: <http://www.bankofcanada.ca/rates/related/inflation-calculator/>

⁷ Québec figures should be treated with caution due to the low number of respondents

⁸ Source for 2005 wages: Statistics Canada, 2006 Census of Population, Statistics Canada catalogue no. 97-563-XCB2006026 (Canada, Code01). Source for ECE/As average income, National occupational classification for statistics 2006> Catalogue no 12-583-XIE. Special run conducted by Statistics Canada

⁹ Source: Statistics Canada. Table 282-0073 - Labour force survey estimates (LFS), wages of employees by job permanence, union coverage, sex and age group, unadjusted for seasonality, monthly (current dollars unless otherwise noted), CANSIM (database).

EDUCATION MAKES A DIFFERENCE

In 2012, median wages were higher for program staff with an ECE credential than for those without. The median hourly wages were:

- \$13.00 with no post-secondary ECE
- \$16.88 with an ECE certificate or diploma
- \$17.20 with an ECE-related degree

UNIONIZED CENTRES HAD HIGHER WAGES AND MORE BENEFITS

- 21.5% of program staff reported belonging to a union.
- The median hourly wage for unionized staff was \$20.11, compared to \$15.50 for non-unionized staff.
- The median hourly wage for directors who worked in unionized centres was \$25.55 compared to \$21.34 for those worked in non-unionized centres.
- A higher percentage of unionized staff had access to a number of key benefits than non-unionized staff.

OTHER BENEFITS AND PERSONNEL PRACTICES

Some program staff had access to a range of other job-related benefits and worked in centres with particular personnel practices in place. Given the differences in the sample and survey design in the 2012 and 1998 studies, direct comparisons of availability of benefits are not possible. However, there appear to have been both gains and losses in some areas.

A higher percentage of staff in 2012 than in 1998 reported access to:

- Pension or RRSP benefits
- Regular, written performance appraisals
- On-site staff room

A lower percentage of staff in 2012 than in 1998 reported access to:

- Paid preparation time
- Written job descriptions
- Financial assistance for ECE-related PD
- Paid release time for ECE-related PD

TYPE OF BENEFIT (2012)	% WITH BENEFIT		
	NON-UNION	UNION	ALL STAFF
ADDITIONAL MEDICAL COVERAGE	40	78	48
PAID SICK OR PERSONAL LEAVE DAYS	55	89	63
LIFE AND/OR DISABILITY INSURANCE	35	72	43
TOP UP MATERNITY BENEFITS	11	35	16
PENSION PLAN OR RRSP CONTRIBUTION	27	76	38

PERCENT WITH SELECTED BENEFITS – 2012 DATA		PERCENT WITH SELECTED PERSONNEL PRACTICES – 2012 DATA	
PAID PREPARATION AND PLANNING TIME	43.8	WRITTEN JOB DESCRIPTION	71.1
PAID OVERTIME	30.5	POLICY / PROCEDURE MANUAL	83.3
TIME IN LIEU FOR OVERTIME	42.6	REGULAR WRITTEN PERFORMANCE APPRAISAL	51.1
PAID RELEASE TIME FOR ECE-RELATED PD	47.6	NONE OF THE PREVIOUS	4.4
FINANCIAL ASSISTANCE FOR ECE-RELATED PD	35.7		
FULL/PARTIAL PAYMENT OF MEMBERSHIP	17.5		
ON-SITE STAFF ROOM	67.6		
FREE PARKING	62.8		
MEALS PROVIDED	29.9		
FINANCIAL ASSISTANCE FOR ECE-RELATED PD	44		

RECRUITMENT AND RETENTION

The recruitment and retention of qualified and skilled early childhood educators are important factors in the provision of quality child care. High turnover and a shortage of qualified staff have long been issues for the sector. The CCHRSC *Estimates of Workforce Shortages* (Centre for Spatial Economics, 2009, p.26) estimated a Canada-wide shortage of more than 4,800 staff in 2007 to fill available positions. As a result of the shortage, employers were increasingly hiring staff with lower qualifications than required by regulation.

The *You Bet We Still Care!* (2012) employer questionnaire gathered information on hiring practices and experiences to examine current recruitment and retention challenges.

RECRUITMENT AND RETENTION OF QUALIFIED STAFF AND DIRECTORS CONTINUE TO BE CHALLENGES FOR MANY EMPLOYERS

Provinces and territories have different regulations for the amount of training required and the numbers of trained staff required to work with a group of children. In most provinces, when a centre cannot meet those regulations they receive an exemption on their license (a variance), often requiring a staff training plan and other measures to ensure future compliance.

Across Canada, a higher number of employers reported a licensing variance for program staff (5%) than for supervisory staff (2.3%). Further analysis of the percentage of centres requiring a variance needs to be analyzed within the context of each province or territory's practices regarding variances, requirements for percentage of qualified staff per centre, and the type of qualifications needed.

“ Overall the ECEC sector always seems to be in a recruitment and retention crisis. I believe that this is because of poor employment practices; low salaries; and a lack of professional standing. ”

Employer from Newfoundland and Labrador

STAFF TURNOVER

Employers were asked how many permanent staff had left their centre in the previous 12 months.

- 65.5% of employers reported at least one permanent staff leaving their centres in the past 12 months. (Note that additional employers were still involved in hiring staff for reasons of expansion, or to replace a staff on leave).
- Of the 65.5% of employers who had permanent staff leave 73.4% reported that at least one departing staff was a qualified ECE.
- Commercial centres reported a somewhat larger average number (2.4%) of qualified staff leaving than non-profit centres (1.9%).
- Employers in Newfoundland and Labrador and Alberta reported the highest average number of permanent staff with an ECE credential leaving in the past 12 months (4.0% and 3.8% respectively) and in PEI, Québec and Manitoba the lowest (1.5%, 1.6% and 1.7% respectively). The Canada-wide average was 2.4%.

HIRING

Employers hire for a number of reasons – to replace permanent staff who have left their position, to temporarily replace staff who are on an extended leave, and to add staff for expansion of their programs. 72.1% of employers hired at least one program or supervisory staff in the past 12 months.

The main reason in for hiring, in every province but Québec, was to replace staff that left. The highest percentage of employers who hired to replace staff who left was in Newfoundland and Labrador and the lowest in Québec.

There was a considerable range across provinces and territories in the percentage of newly hired staff who had an ECE qualification. Employers in Nova Scotia and British Columbia reported the highest percentage of new staff with an ECE credential (81.7% and 77.5% respectively), compared to Manitoba and New Brunswick with the lowest (37.6% and 49.4% respectively).¹⁰

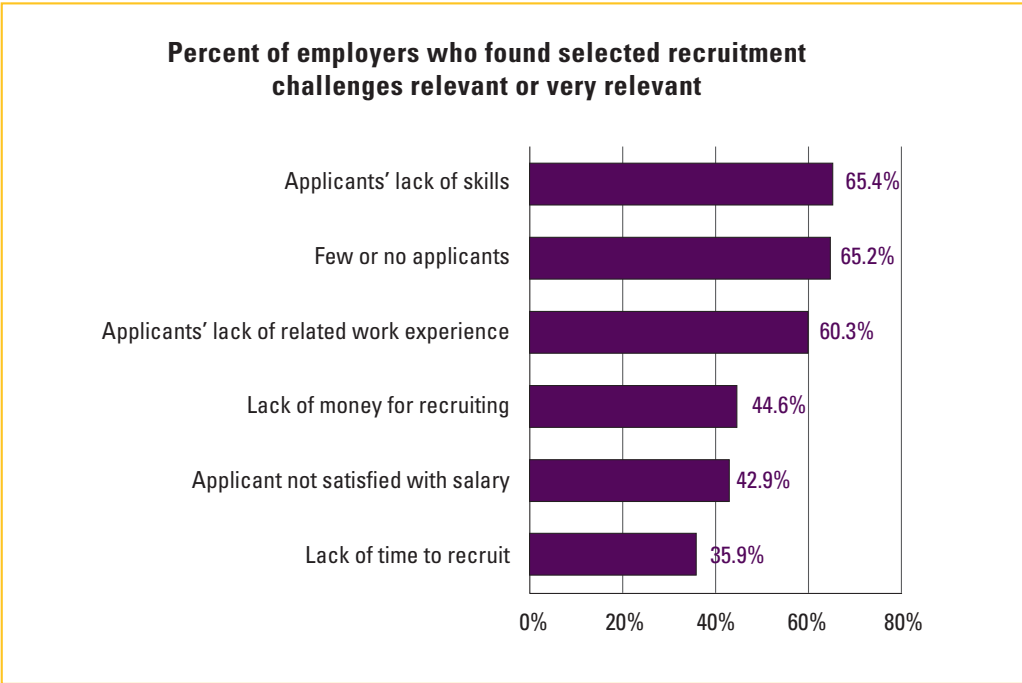
Challenges To Hiring Qualified Staff

Employers reported a number of recruitment challenges, primarily related to the lack of appropriate applicants for the position.

Competition from the school system was more of a challenge in Ontario, with 75.9% of employers in Ontario compared to 39.5% across the rest of the country reporting it as a relevant or very relevant challenge. 10.8% of employers reported that it took more than six months to fill a position for a qualified program staff and 13.2% took more than six months to fill a supervisory position.

PERCENT OF NEW STAFF HIRED WITH AN ECE CREDENTIAL	
NEWFOUNDLAND AND LABRADOR	75.8
PRINCE EDWARD ISLAND	54.6
NOVA SCOTIA	81.7
NEW BRUNSWICK	49.4
QUÉBEC	73.5
ONTARIO	72.0
MANITOBA	37.6
SASKATCHEWAN	59.3
ALBERTA	75.8
BRITISH COLUMBIA	77.5
CANADA	68.1

Note: Due to the very few infant programs in Newfoundland and Labrador, the median reported fees for infants has not been included. The territories are not included due to small sample size.

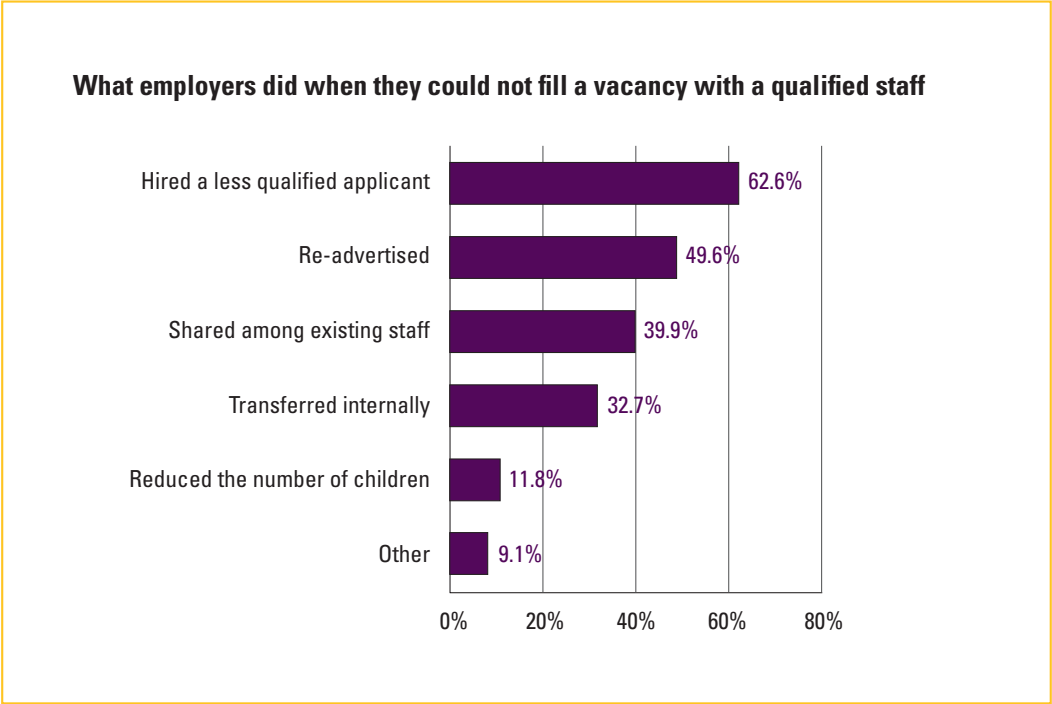


¹⁰ Further analysis on this data is needed to determine the types of positions that needed to be filled.

Employer Responses To Recruitment Challenges

36.7% of employers indicated that they did not experience any recruitment challenges in the past 12 months; they either did not have any vacant positions, or they were able to fill a vacancy with qualified staff.

63.3% of employers reported challenges in trying to fill a vacant position. The following chart describes the various solutions those employers reported when they could not find a qualified staff to fill a vacancy. The most common response of those who had difficulty filling a vacancy was to hire a less qualified applicant.



“ I have found that when we post our job openings, we focus on our vision, core values, the early learning framework, passion and learning, etc. This helped us greatly to hire staff for our expansion. This is what we resort to when wages cannot be increased without more outside support. ”

Employer from British Columbia

JOB SATISFACTION

CENTRE DIRECTORS AND PROGRAM STAFF REPORT HIGH RATES OF JOB SATISFACTION

- Directors in early childhood centres report an overall rate of job satisfaction of 90.5% - compared to the 78.3% reported by program staff.
- 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.
- Directors were more likely to say that they did not have enough time to do what needed to be done.
- 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.
- Few directors (10%) and program staff (13%) reported frustration with their work.

LEVELS OF JOB SATISFACTION IN 2012 ARE CONSISTENT WITH EARLIER FINDINGS

Although the 2012 study did not survey the same people that were part of the 1998 *You Bet I Care!* study, employees working in child care centres in 2012 have, for the most part, continued to rank positive elements of job satisfaction as highly as they did in 1998, and had fewer reports of negative statements.

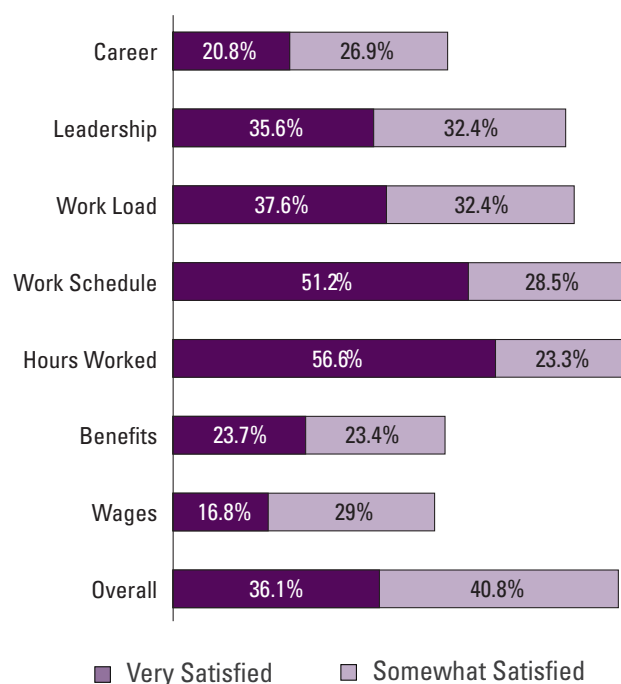
WAGES AND BENEFITS

The 2012 *You Bet We Still Care!* study also examined specific aspects of work in full-day child care centres and found that for program staff, satisfaction with wages and benefits ranked lower than hours of work, work schedule, leadership in the centre, and career opportunities. Although the study found gains in wages in most jurisdictions, the issue of compensation continues to be the aspect of the work that is least satisfying.

IT'S IMPORTANT WORK

97% of directors and 94% of program staff agreed with the statement that their work is important.

Aspects of job satisfaction for program staff



FUTURE PLANS

All survey respondents were asked about their immediate plans regarding their employment, and their plans for three years into the future. Analysis of responses considers that there are different types of job turnover, including the following:

Job turnover occurs when a teacher or director leaves a child care center, but does not necessarily leave the child care field. Job turnover may be involuntary (in the case of a lay-off or dismissal) or voluntary, as when a teacher or director leaves for a better-paying job or in response to a pregnancy or family move.

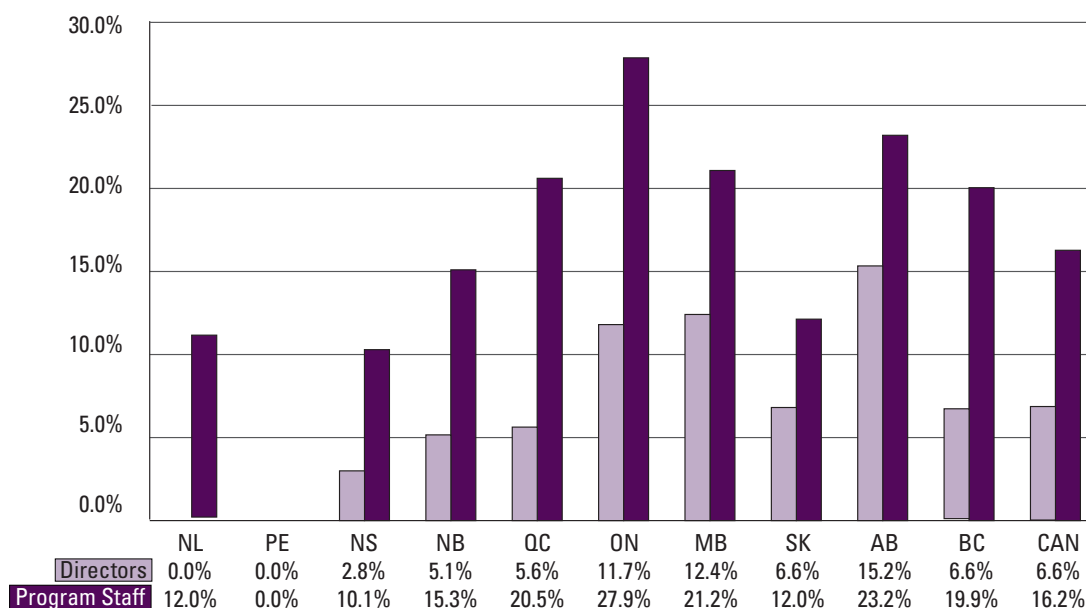
Position turnover occurs when a teacher moves to a different classroom within a center, or when a teacher or director is promoted and moves to a different site within an agency; expansion of the program resulting in new opportunities; or a desire to work with another age group of children. Position turnover is typically viewed as positive for the individual or even the agency, although it may still involve some disruption for children, families and other staff.

Occupational turnover occurs when a teacher or director leaves a job at a center and departs from the child care field. The consequences of job turnover are felt most directly in centers when directors and co-workers struggle to meet required adult–child ratios in response to a staff departure (Whitebook and Sakai, 2003, p.274).

“The biggest challenge for me as director is recruitment and retention ... due to low wages and competition from the school boards. In the past few years I have lost 5 great employees to the schools.”

Employer from Ontario

Percent of directors and program staff currently looking for a new job



LOOKING FOR A NEW JOB?

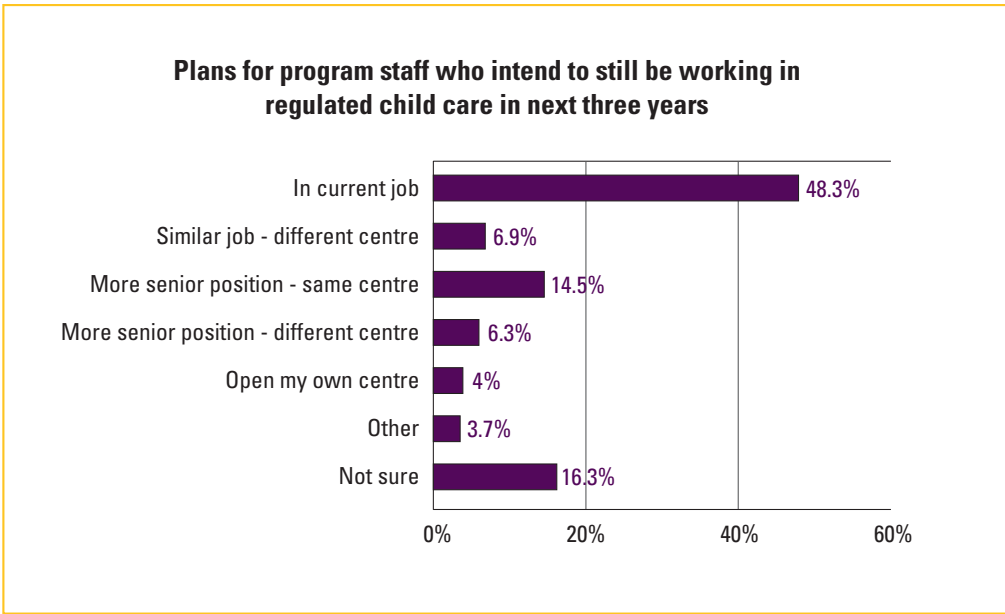
When asked about immediate plans, 9% of Directors and 23% of program staff responded that they were currently looking for another job.

For program staff, the three main reasons for seeking other employment primarily were career advancement, seeking higher wages, and dissatisfaction with the current work environment. While only 3.6% of respondents indicated that they were looking for employment outside of the ECEC sector, 9% indicated they wanted to work in early childhood, but not in centre based child care.

Further analysis¹¹ on this question showed that the majority of respondents who wanted to work in ECEC but not in centre based programs were from Ontario (76%). This finding needs to be considered within the context of new policy initiatives in that province, with many employment opportunities available to ECEs to work in school based programs, given the ongoing implementation of full-day early learning for four and five year olds. Conversely, the virtual absence of any program staff or directors in Prince Edward Island looking for new employment must be analyzed within the new policy context in that province, where a new system of governance was introduced in 2010 and has been very well received.

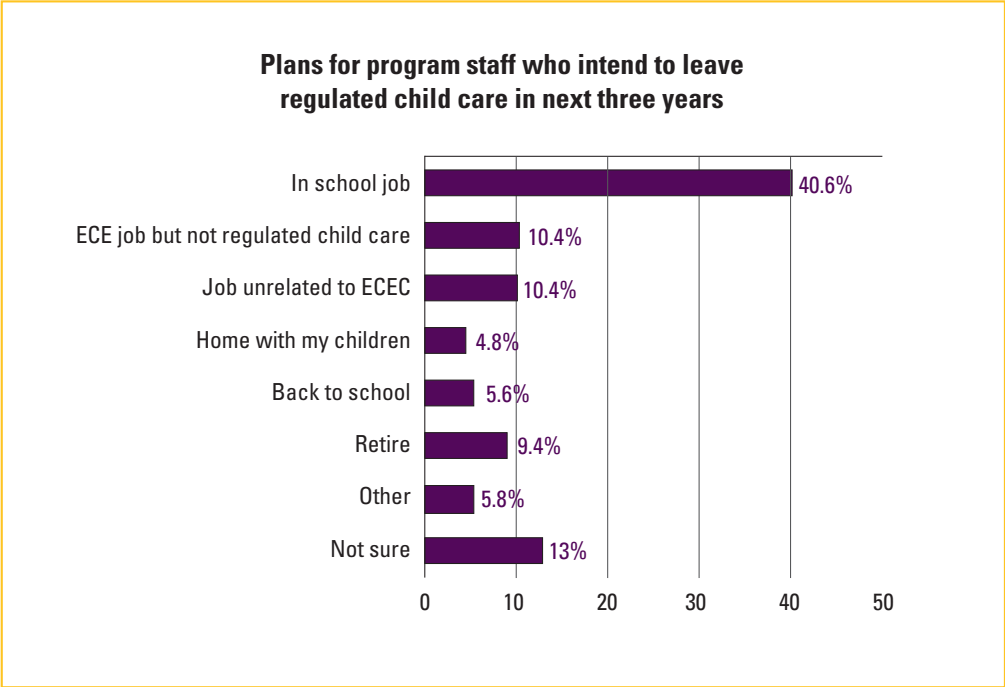
WILL YOU CONTINUE TO BE WORKING IN REGULATED CHILD CARE IN THREE YEARS?

All respondents were asked if they expected to be working in the regulated child care sector in three years. Those who indicated they would be were asked if they would be in the same job or doing something else. Those who indicated they planned to leave the sector were asked about their specific plans.



Although 90.5% of directors in the survey reported job satisfaction, 82.4% indicated they expected to be working in regulated child care in three years. Among program staff who responded to the survey, approximately 75% indicated they intended to continue working in regulated child care in three years. Overall, 24% of respondents indicated they expected to leave the regulated child care sector in three years.

¹¹ Figures for Québec should be used with caution due to low number of respondents.



The majority of those who plan to continue working in regulated child care intend to still be working in the same centre, although responses suggest both position and job turnover.

Despite relatively high levels of job satisfaction, the number of people intending to leave their employment in the regulated child care sector actually increased slightly when compared to responses to this question in 1998. At that time, 22% of teaching staff indicated they would be leaving (compared to approximately 25% in 2012) and 16.2% of directors reported their intention to leave (compared to 17.6% in 2012).

The above finding is consistent with changes in the ECEC sector since 1998. Key informants and focus group members described increased integration between the early childhood and education sectors in recent years. In fact, 78.4% of all program staff who are planning to move to the school system are from Ontario, where a province wide full-day early learning initiative is being implemented, with employment opportunities for early childhood educators in schools across the province.

DIRECTORS' FUTURE PLANS

Centre directors who responded to the *You Bet We Still Care!* (2012) survey were less likely than program staff to indicate that they were currently looking for a new job (9% vs. 23%) and less likely to say they would be leaving the regulated child care sector in three years (17.6% vs. 24%).

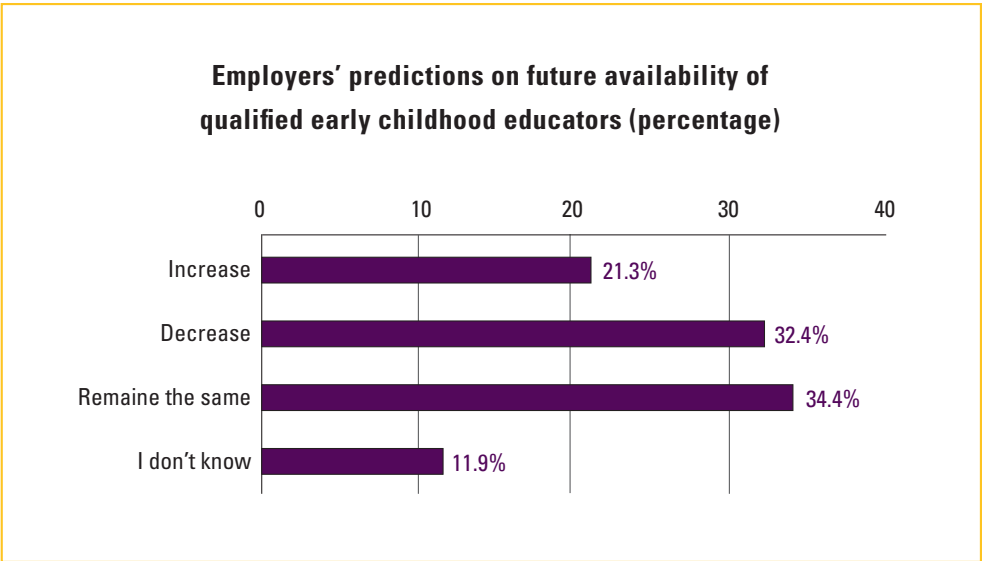
Of the directors who were currently looking for a new job, their reasons for doing so were similar to those expressed by program staff. Career advancement (24.3%) and better wages (21.7%) were the main reasons cited. Only 6% of those looking for a new job intended to leave the early childhood education and care sector.

When directors who said they would be leaving the regulated child care sector in three years were asked what they expected to be doing, the most frequently cited response was retirement (28%). In contrast, the 1998 *You Bet I Care!* study found that only 13.6% of directors indicated they had plans to retire in three years. The 2012 figures on retirement plans are another indication of an aging workforce in regulated full-day child care centres.

Another 24.6% of centre directors were unsure about their future. 11.8% expected to be working in the school system. As was the case with program staff, further analysis showed that 75% of those who planned to work in the school system were from Ontario.

EMPLOYERS’ PERCEPTIONS OF FUTURE RECRUITMENT OF QUALIFIED EARLY CHILDHOOD EDUCATORS

Employers were asked if they thought, based on their professional experience, whether the availability of qualified early childhood educators would increase, decrease, or remain the same. Employers were mixed in their responses, but were generally pessimistic. Only 21.3% thought availability would increase. The majority of employers who responded to this question (66.8%) thought availability would either stay the same or decrease.



FUTURE RESEARCH

You Bet We Still Care! (2012) has provided the ECEC sector with a rich data set regarding human resources in centre based, full-day, licensed child care programs. In April 2014, the data set will become publicly available for further analysis. The public data set will be housed by the Institute for Social Research at York University (Toronto, Ontario, Canada).

Recommendations for future research include topics that may be addressed by the current data set:

- How do multi-site and multi service organizations' and single-site child care centres' human resource practices, job satisfaction, retention, and future plans compare?
- What is the impact of provincial territorial government policy impacts on wages and job satisfaction, with specific analysis of job satisfaction, wages, and education levels in jurisdictions with different policy approaches?
- How has the increased involvement of the education sector in early childhood impacted the recruitment and retention of qualified early childhood educators?
- How do provincial-territorial space creation initiatives impact recruitment and retention of qualified early childhood educators?
- What additional changes and/or trends can be found by comparing findings from *You Bet We Still Care!* (2012) and those of the 1998 *You Bet I Care!* and the 1991 *Caring for a Living* studies?
- What is the relationship between access to wage enhancement grants and levels of job satisfaction?
- What is the relationship between factors related to job satisfaction and intent to stay in the regulated child care sector?
- Are job satisfaction and job retention for program staff and directors any different in those who are older than 45 years?
- How do the reasons for hiring and reasons for staff leaving relate to a centre's recruitment challenges and practices?
- What types of centre characteristics and practices are associated with reduced or increased staff turnover?
- Does age of the program staff and/or centre director influence participation in professional development, holding a second job, looking for another job, and/or plans for the future?
- Are parent fees related to wages and benefits, and if so, how?
- Do the types of age groups served (e.g., infants, toddlers, preschool, school age) influence wages, benefits, or job satisfaction?
- How does age, education, and/or level of experience influence which staff are currently seeking another job for career advancement and/or better wages?
- Does membership in a child care organization influence job satisfaction and/or intent to stay in the child care sector?

In addition to recommended research topics, the following comments and recommendations address considerations for future methodological approaches to conduct this type of research in the ECEC sector:

- The growing emergence of full-day, centre based licensed child care programs that are operated by organizations holding more than one license further complicates an already complex portion of the ECEC sector. It is difficult to identify in precise terms the “employer”. We recommend that further research on the full-day centre based child care sector (as described above) provide for separate lines of investigation for those who work directly with children, centre directors who provide supervision and leadership on a day to day basis, and/or those who are responsible for recruitment, setting personnel policies, and overall administration. This survey identified:
 - Administrators of multi-site organizations
 - Administrators of multi-service (child and family services) organizations who may have been responsible for one or more than one licensed child care centre
 - Administrators of single-site centres
 - Owner/directors of single-site centres
 - Directors in multi-site programs
 - Directors in single-site programs
 - Members of Boards of Directors or First Nations Band Councils
 - Program staff with some supervisory responsibility
 - Program staff with no supervisory responsibility
 - Inclusion staff

Conducting surveys using an on-line format is especially difficult for program staff. Computer literacy skills are mixed, and may negatively impact the ability to access and/or complete the survey. Program staff may or may not be able to complete the survey at their workplace.

- The open link for the on-line format did not allow the research team to have any control over who responded to the survey. A large number of respondents had to be deleted, even though there were screening questions at the beginning of the survey.
- Future research studies of this nature will need to provide adequate financial resources and time frames in order to develop, launch, and provide analysis of a potentially complex and very rich data set such as the data collected in *You Bet We Still Care!*

The concluding recommendation for this report concerns the need for ongoing systematic collection of data about the child care workforce. As noted at the beginning of this report, the *You Bet We Still Care!* (2012) survey was initiated in response to a key recommendation from the Expert Panel convened for the CCHRSC’s *Labour Market Information Research Agenda* project. As is noted in the project’s final report *Gathering Labour Market Information*:

In order to understand and address key labour market and human resource issues facing the ECEC sector, such as turnover and recruitment and retention, it is important to have current, first-hand data and labour market information on the workforce. Employers, decision-makers and planners working in the sector can use the data to make informed decisions related to short- and long-term planning. (Centre for Spatial Economics, 2009, p.16)

SUMMARY OF KEY FINDINGS

IN CONCLUSION ...

You Bet We Still Care! has made a significant contribution to the body of Canadian data regarding human resource issues in the full day, centre based segment of the early childhood education and care sector.

This concluding section provides a brief narrative overview of some of the key findings as described in the previous sections of this report. Detailed information and statistical evidence on these and other findings have been presented and explained in the report's previous sections.

PROGRAM STAFF AND DIRECTORS HAVE MORE EDUCATION AND EXPERIENCE THAN THOSE IN THE 1998 STUDY

A vast majority of program staff and directors have regular work hours and schedules. Many have been in the same position for several years.

A majority of program staff and directors have post-secondary credentials in early childhood education, and the vast majority earned those credentials at a community college in the province where they now live and work.

The significant increase in years of experience suggests that retention has improved, and that strategies for retention are having an influence in many provinces and territories.

A large majority of both program staff and directors participated in professional development activities in the past year. The education level, experience, and age of the child care workforce have implications for the nature and type of ongoing professional development organized for the sector.

THE WORKFORCE IS AGING, AND RETIREMENTS CAN BE EXPECTED

Similar to all occupations, the child care workforce is aging. Statistics Canada reports that between 1997 and 2010, the number of female workers in Canada 55 years and older grew by 160%. (Carrière, and Galarneau, 2011, p.13) The aging child care workforce presents similar challenges to those faced by all occupations.

As might be expected with an aging workforce, 28% of centre directors plan to retire in the next three years. This has implications for succession planning and recruitment.

APPROXIMATELY 40% OF ALL CHILD CARE CENTRES ARE OPERATED BY ORGANIZATIONS HOLDING MORE THAN ONE CHILD CARE LICENSE

Although data on the numbers of such organizations was not collected in 1998, most provincial and territorial licensing offices report that the number of organizations holding multiple licenses has increased in recent years. As well, survey data indicated that there are many multi-service agencies (managing a variety of types of programs for children and families) that hold one or more child care centre licenses.

WAGES ARE INCREASING BUT CHALLENGES REMAIN

- After adjusting for inflation, program staff in almost all jurisdictions have seen increases to their hourly wages, and the range of wages across provinces was smaller than it was in 1998.
- Wages of program staff have increased at a greater rate than those of directors, and in two provinces directors wages lost ground.

- Unionization appeared to have a positive impact on both wages and benefits. Directors also appeared to benefit from unionization in terms of wages and benefits, whether or not they are in the union themselves.
- In 2012, hourly wages of program staff were still well below the overall Canada-wide average, but that gap appeared to be narrowing. Directors earn 92% of the overall average.
- Access to benefits remained uneven, and, overall, fewer than 50% of staff had access to most benefits.

PARENT FEES HAVE INCREASED EVEN AFTER ADJUSTING FOR INFLATION

- Parent fees have increased in all jurisdictions except Québec and Manitoba. Parent fees are regulated in these two provinces, as well as in Prince Edward Island.

JOB SATISFACTION IS HIGH

- Program staff and centre directors reported high levels of job satisfaction, but directors had higher rates in almost all categories. Wages and benefits are the areas that report the lowest levels of satisfaction for both.
- These findings are consistent with those of the 1998 *You Bet I Care!* Job satisfaction research undertaken in the non-profit sector also found high levels of job satisfaction, particularly when the employees were committed to the work they were doing.
- The vast majority of both program staff and centre directors believe that the work they are doing is important.

RECRUITMENT CHALLENGES

- Employers report continued challenges in recruiting qualified staff. Many employers commented that they are not able to find staff with the qualifications they are seeking, and that initiatives to create new spaces and/or to introduce new early childhood programs linked with the education sector are making it even more difficult.

For more Information on the *You Bet We Still Care!* study and to access a companion PowerPoint presentation, visit:

www.ccsc-cssge.ca

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Project Steering Committee Members:

Jamie Kass – Committee Chair

Child Care Coordinator, Canadian Union of Postal Workers
Ottawa, ON

Lynell Anderson

Researcher, University of British Columbia
Vancouver, BC

Margaret Ferniuk

Provincial / Territorial Directors of Early Childhood Education and Care
Winnipeg, MB

Martha Friendly

Executive Director, Childcare Resource and Research Unit
Toronto, ON

Kim Hiscott

Executive Director, Andrew Fleck Child Care Services
Ottawa, ON

Christa Japel

Faculty, Université du Québec à Montréal
Montreal, QC

Donna Lero

Faculty, University of Guelph
Guelph, ON

Child Care Human Resources Sector Council Staff

Diana Carter, Executive Director

Ashley Stewart, Project Manager

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