



2016 Early Care and Education Survey

**SUCCESS
BY 6**

2016

**EARLY CARE AND
EDUCATION
SURVEY**

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EXECUTIVE SUMMARY

United Way for Greater Austin first began collecting survey data from licensed facilities in 2006 to improve knowledge about the quality and availability of early care and education in Travis County. The survey collects data on each center's enrollment, quality rating, funding and budgeting priorities, along with staff education, wages, benefits, working conditions and retention.

Over the past decade an ever-growing body of research has emphasized early childhood as the critical moment for ensuring lifetime success. It is imperative that Austin, in order to remain a prosperous and thriving community, focuses on early care and education to prepare its children for future success in school, work and life.

In order to equip children with the tools they need for the pivotal transition to kindergarten and elementary school, safe, high-quality early care and education must be available for all children in Central Texas. This is of greatest concern for vulnerable low-income children, who are likely to start behind and stay behind without appropriate interventions. To determine the most pressing priorities for success in these interventions, up-to-date data about center conditions is necessary.

The results of the 2016 Early Care and Education Survey illuminate a variety of successes and challenges for this community. In many respects conditions are improving and there are still a number of obstacles to overcome before Central Texas children can thrive. The following report illustrates the conditions of licensed facilities in Austin and Travis County.

The information contained within should be used as a resource for the planning efforts of the Travis County early care and education community. As the population in Austin continues to grow, it is a primary concern to provide quality childcare to newcomers and long-term residents alike.

The profile of the survey closely matches the total centers in Travis County. Further information and demographics of centers that responded can be found in the Appendix.

Special Thanks

Thank you to Meg Susong, Special Projects Coordinator for UWATX's Success By 6 team, for conducting the survey, analyzing the data, and preparing this summary.

EXECUTIVE SUMMARY

Significant findings from the 2016 survey include:

- Teacher education levels in early childhood education centers vary greatly between the regions of Travis County. South and East Austin have 20% and 25% respectively of center teachers with no early childhood education beyond high school. West, North, and Central Austin fare better with only 7-9% of teachers having no formal early childhood education training.
- Among full-time, lead teachers, only 30% of nonprofit and 37% for-profit centers have at least a four-year degree.
- Both nonprofit and for-profit centers have over a quarter of lead teachers with only a high school degree or less, with 37% at nonprofit centers and 28% at for-profit centers.
- In Central, West, North, and South Austin, the percent of lead teachers with at least a bachelor's degree hovers around 40%. However in East Austin percentages continue to remain lower with only 25% of lead teachers having at least a four-year-degree.
- Early care and education teachers, on average, made between \$10.67 and \$14.07 per hour with limited benefits, a drop of \$0.25 to \$0.75 per hour since the 2014 Survey was conducted.
- The number of full-time, nonprofit center directors making below \$20,000 is at an alarming 30%.
- Over the past two years, the benefits for teachers working in for-profit centers have improved across the board, while the benefits for teachers working in nonprofit centers decreased in every category – paid maternity leave, retirement or pension plan, and reduced childcare – except unpaid maternity leave.
- The overall percentage of surveyed centers offering any form of partially or fully paid insurance to their employees has stayed steady at 46% from 2014 to 2016.
- The top five funding priorities of centers all related to improving conditions for teachers through increasing salaries, training, and benefits. Emphasis has remained on improving conditions for center teachers since 2012 – suggesting that centers are still lacking the necessary resources to make improvements.
- All regions in Travis County depend on parent fees for the largest portion of their income. Centers in East, South, and North Austin also rely on public subsidies for significant funding.
- 38% of all centers surveyed reported being accredited to meet the quality standards set by NAEYC, NAC, or Texas Rising Star (TRS), a significant decrease from 63% in 2014. This drop is not unexpected due to the recent changes in the TRS standards and rating system as a result of HB 376.

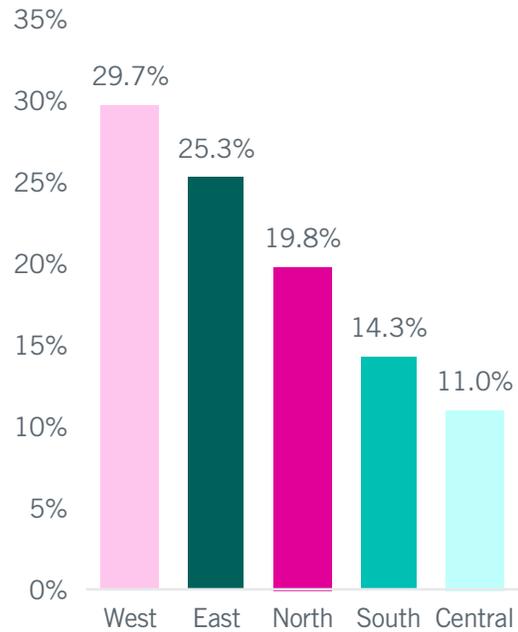
SURVEY REGIONS & ENROLLMENT

The 2016 Early Care and Education Survey was distributed via email to a total of 323 centers in Travis County. The 91 centers who responded represent 23% of Travis County and a minimum of 19% of the centers in each of the North, South, East, West, and Central regions.

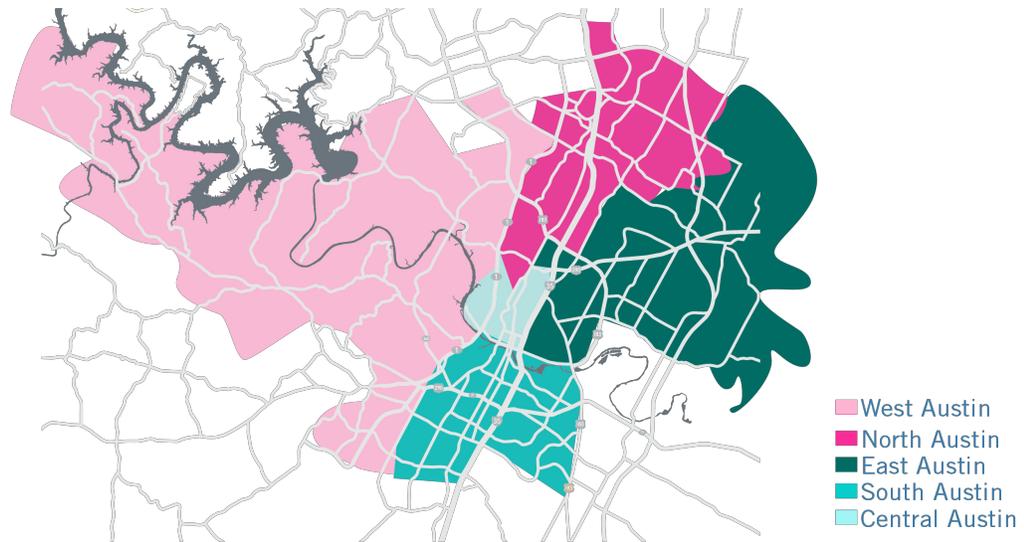
While a minimum of 19% of the centers in each region are represented in the survey data, there is a disparity between regions in terms of their percentage of total respondents. As a result, while 32% of Central Austin centers responded the region ultimately makes up only 11% of total survey respondents; while 22% of West Austin centers responded the region makes up almost 30% of total respondents.

More information about the survey respondents can be found in the appendix.

Regional Representation



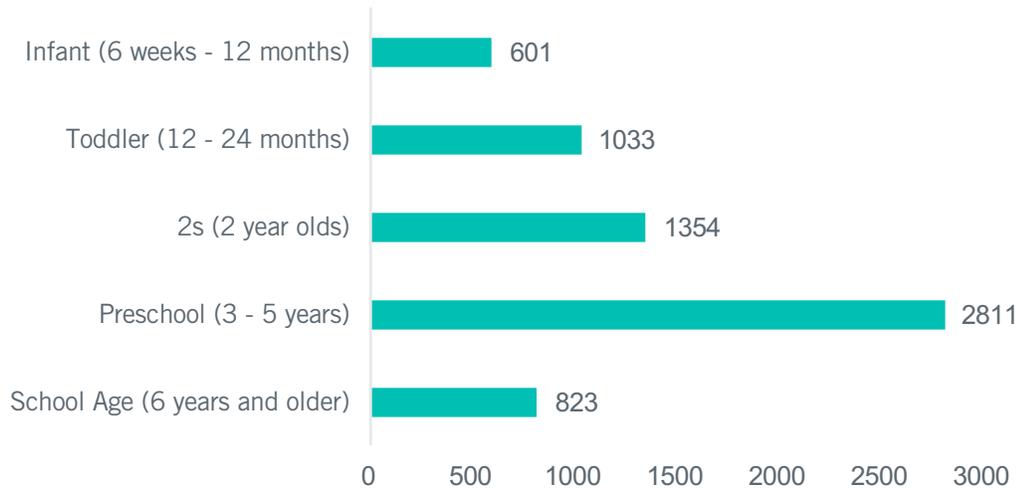
Regions In this Survey



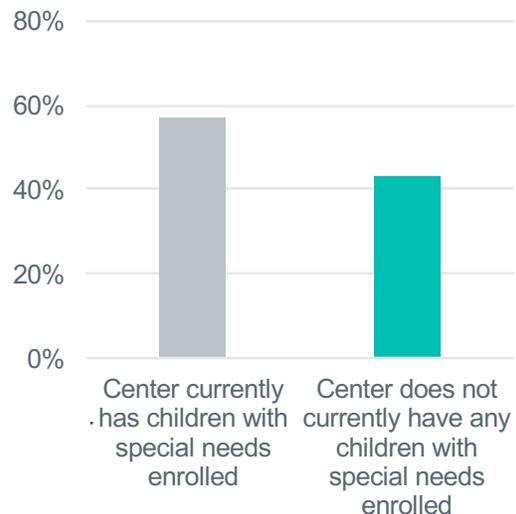
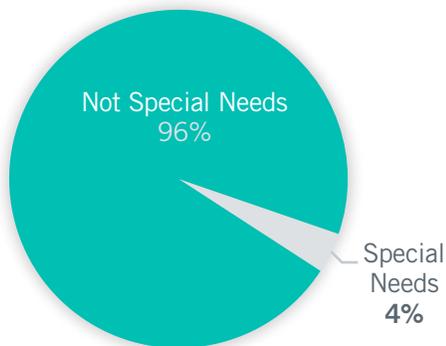
These centers represent a total of 1,021 early care and education teachers with 749 working full-time and 272 working part-time. A total of 6,622 children from infants to school age are represented with 42.4% enrolled in preschool-aged classrooms (ages 3 to 5).

Enrollment of children with special needs has increased by 1% since 2014. While this is a small percentage of all the children currently served by a child care center in Travis county, 57% of centers have at least one child with special needs currently enrolled.

Enrollment By Age



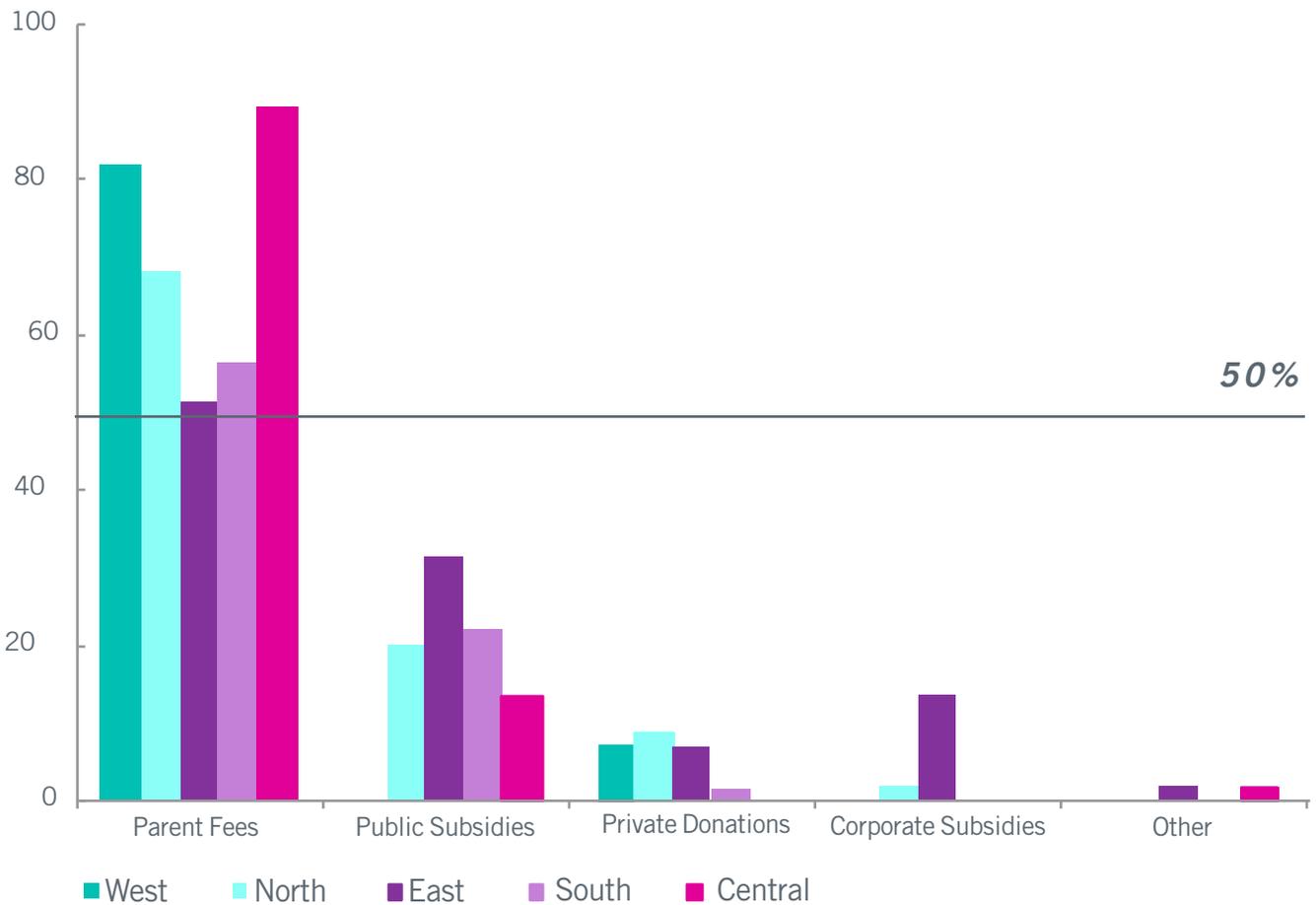
Special Needs Enrollment



FUNDING & PRIORITIES

Funding Sources

Across all five regions, centers depend on parent fees for the 50-to-90% of their income. Centers in East, South, and North Austin also rely on public subsidies for funding, with private donations and corporate subsidies playing a minor role for the regions as well.



Funding Priorities

Centers were asked to rate from one to eleven what their top priorities would be if more funding were available. The top priority of centers since 2012 has been to increase staff salaries and remained so this year. 2016 saw a shift towards an emphasis on increasing salaries, training, and benefits for teachers, with the top five funding priorities all related to improving conditions for center teachers.

For the 2016 survey four additional categories were added based on concerns expressed in the 2014 and 2012 surveys

2014

- 1 | Increase staff salaries
- 2 | Improve staff training
- 3 | Upgrade facilities
- 4 | Increase number of staff
- 5 | Increase program supplies and/or equipment
- 6 | Offer or improve staff benefits
- 7 | Reduce parent fees

** Indicates new priority not ranked in 2014*

"[Teaching is] a high stress, low benefit job.

- Center Director, East Austin

2016

- 1 | Increase staff salaries
- 2 | Increase number of teachers*
- 3 | Improve staff training
- 4 | Offer or improve staff benefits
- 5 | Offer/Increase financial support for teacher education*
- 6 | Reduce parent fees
- 7 | Offer/Increase parent education*
- 8 | Serve a higher number of children from low-income families*
- 9 | Increase program supplies and/or equipment
- 10 | Upgrade facilities
- 11 | Increase number of non-teacher staff*

TEACHER BENEFITS

Child Care, Maternity Leave, and Retirement

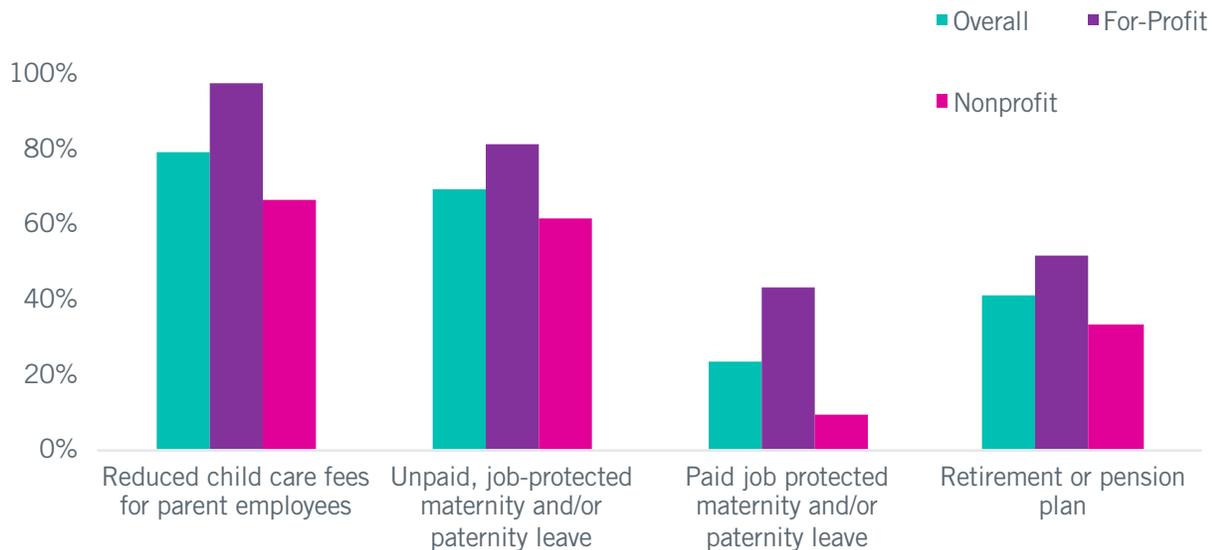
More than three quarters of all centers in Travis county offer reduced child care fees to employees and unpaid maternity leave. However, a higher percentage of for-profit centers provide paid, job protected maternity leave (43%) than nonprofit centers (9%). For-profit centers are also more likely to provide a retirement plan than nonprofit centers (51% versus 33%).

“Teachers are the heart of the program. They are hardworking and deserving of more. We have no more to give.”

- Center Director, South Austin

Over the past two years, the benefits for teachers working in for-profit centers have improved across the board, while the benefits for teachers working in nonprofit centers decreased in every category except for unpaid maternity leave.

Benefits in For-Profit and Nonprofit Centers



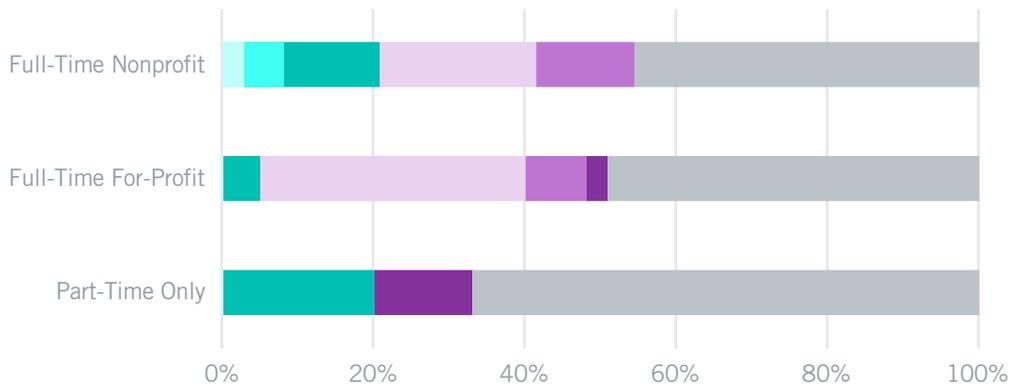
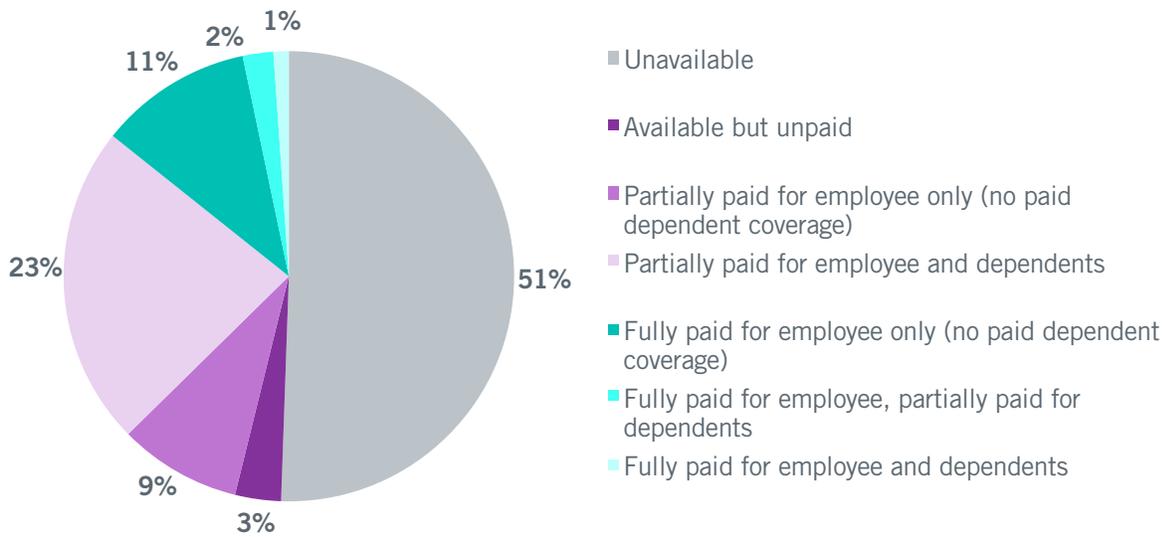
Health Care Benefits

The overall percentage of surveyed centers offering any form of partially or fully paid insurance to their employees has stayed steady at 46% over the past two years.

In 2014 any partially or fully paid benefits were offered at 65% of full-time, nonprofit centers. In 2016 this number fell to only 55%. Full-time, for-profit centers saw an increase, rising from 38% to 48%. Part-time centers saw a small increase from 18% to 20%.

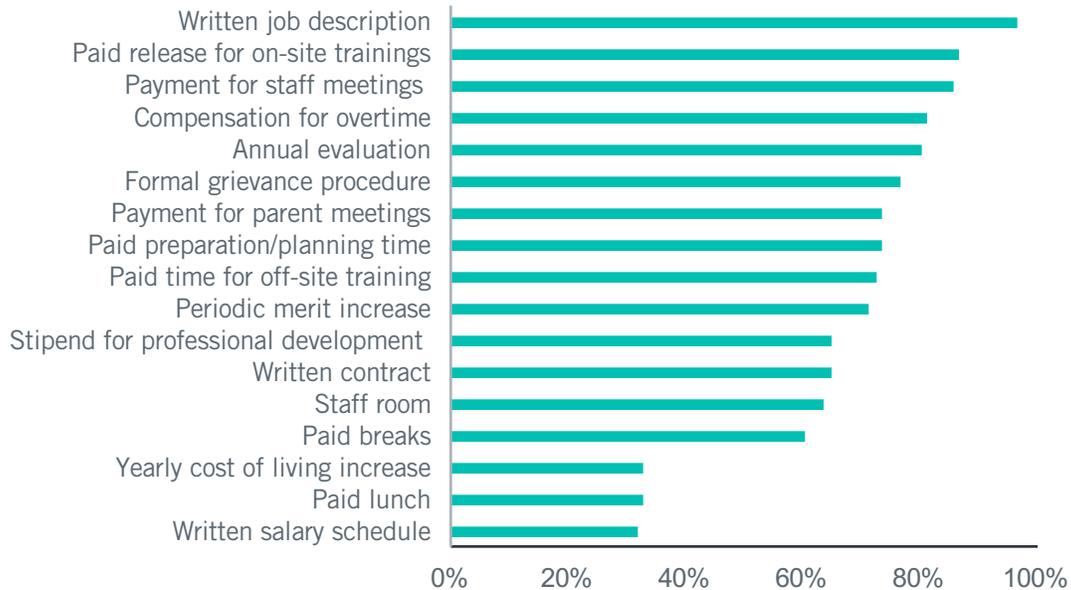
Due to the decrease in benefits for full-time nonprofit centers and the increase in benefits for full-time, for-profit centers, the gap between nonprofit and for-profit full-time centers offering any type of benefit is 7 percentage points in 2016, compared to 27 percentage points in 2014. There is a notable, but unexpected contrast between the extremely low rates of insurance in part-time centers and higher rates in full-time centers.

Types of Health Care Benefits



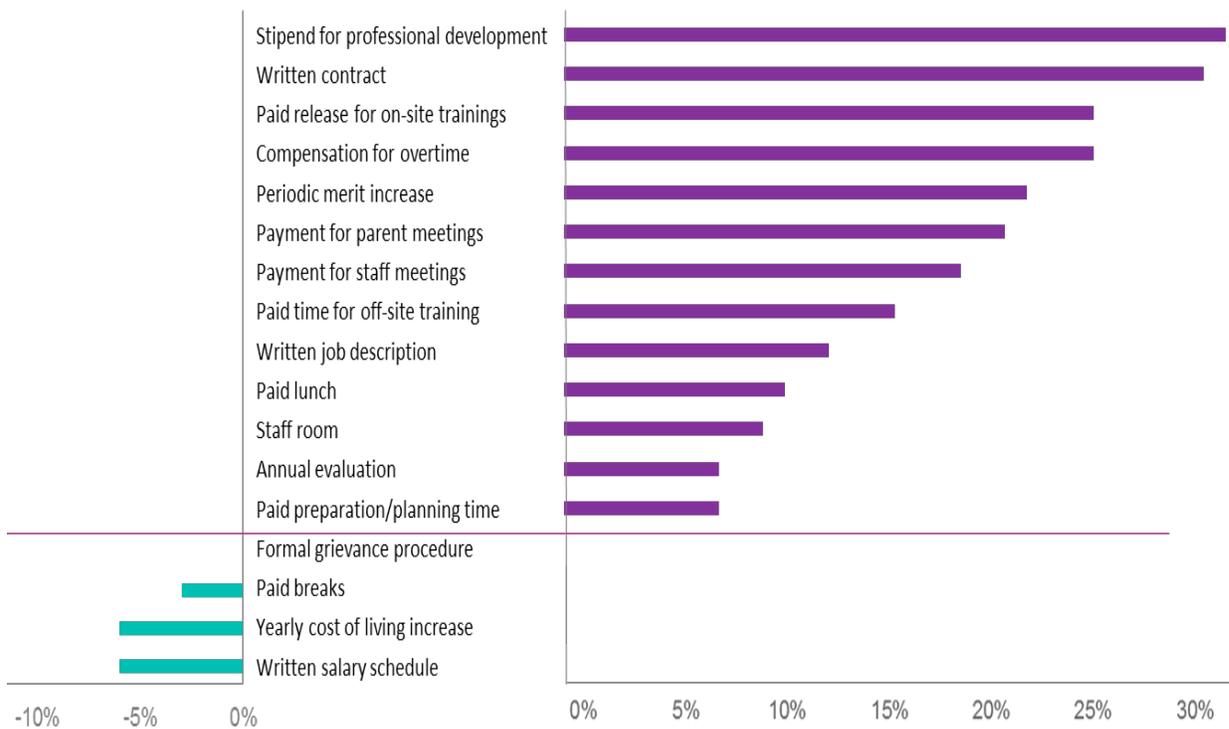
Working Conditions

Working Conditions Offered in 2016



There is a wide array of benefits offered by early care and education centers in Travis County. Compared to the 2014 survey, this survey noted a number of positive significant shifts in these benefits. The benefits that saw the highest increase were stipends for professional development and written contracts. Only paid breaks, yearly cost of living increases, and written salary schedules saw small decreases of around 5%; downwards shifts in those areas are concerning for the field.

Change in Conditions 2014 - 2016

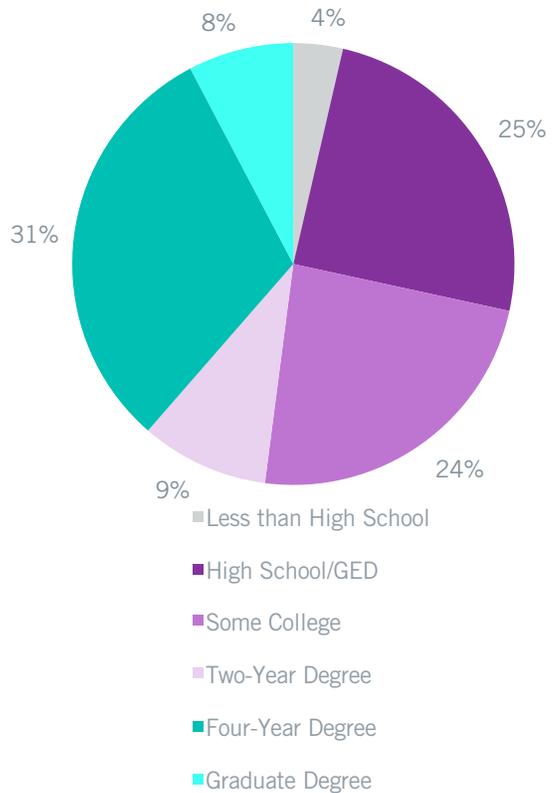


TEACHER EDUCATION

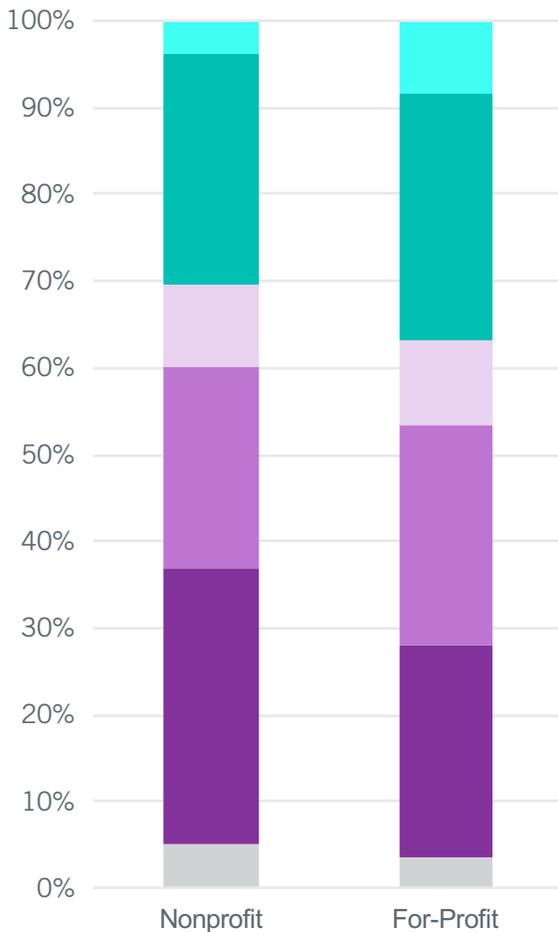
Full-time, Lead Teacher Education by Degree

Among full-time, lead teachers, only 30% of nonprofit and 37% for-profit centers had at least a four-year degree. Both nonprofit and for-profit centers had over a quarter of lead teachers with only a high school degree or less, with 37% at nonprofit centers and 28% at for-profit centers.

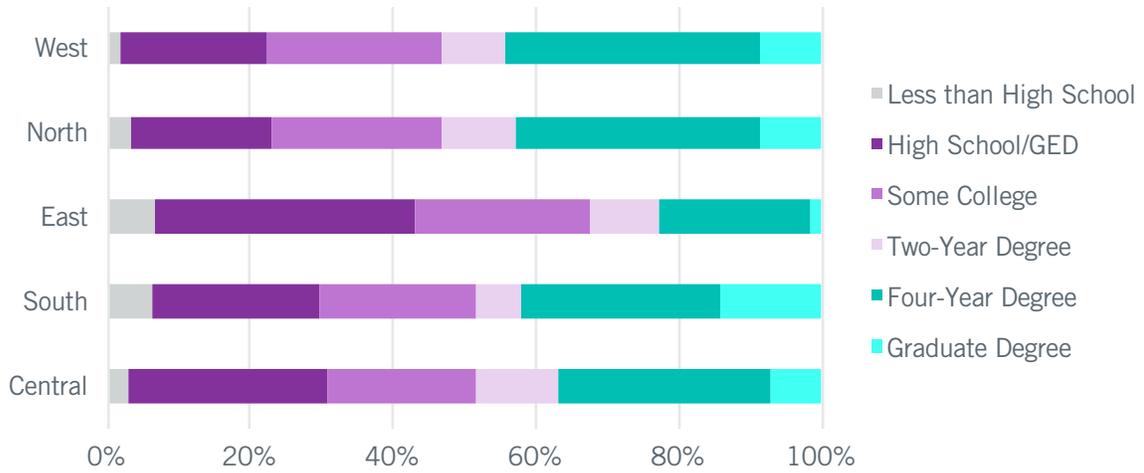
Education Levels of Lead Teachers Overall



Education Levels of Lead Teachers Based On Center Type



Education Levels by Region



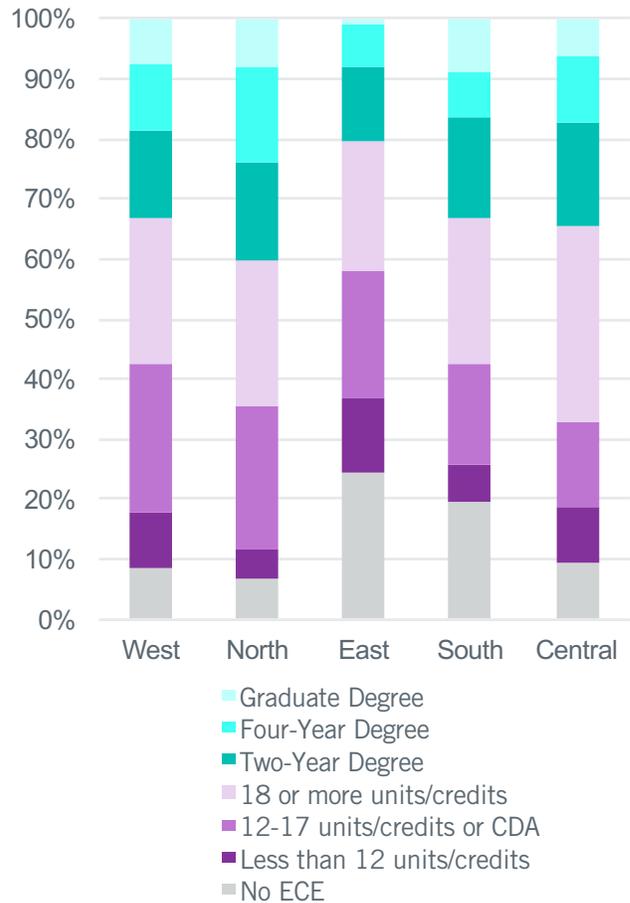
Lead Teacher Regional Differences

The difference between regions for full-time, lead teacher education has become less pronounced across the regions over the past two years. In Central, West, North, and South Austin, the percent of lead teachers with at least a bachelor’s degree hovers around 40%. However in East Austin percentages continue to remain lower with a percentage of lead teachers with at least a four-year-degree only around 25%.

Early Childhood Education Among Lead Teachers

The degree of specialized education related directly to early childhood development is skewed regionally. East and South Austin have 25% or 20% respectively of center teachers with no early childhood education beyond high school. West, North, and Central Austin fare better with only 7-9% of teachers having no formal early childhood education training.

Regional Differences in Early Childhood Credits



"Many of my teachers would like to earn the CDAs and other ECE credentials online rather than in person, because they do not have the flexibility (with jobs and families) to go to a brick and mortar college campus."

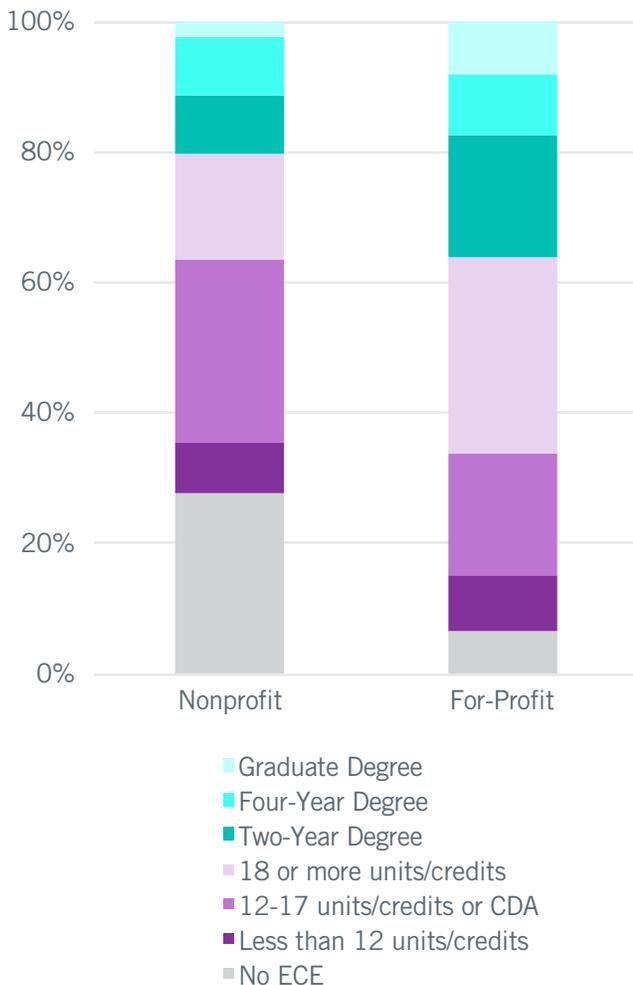
- Center Director, West Austin

Early Childhood Education Among Lead Teachers (Cont'd)

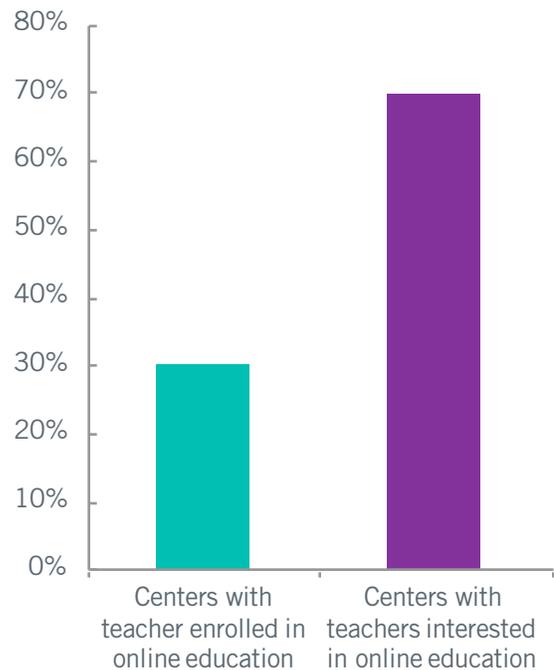
Full-time, nonprofit centers report only 20% of lead teachers have a two-year degree or higher in early childhood education, compared to 36% of lead teachers in full-time, for-profit centers. Almost two-thirds (64%) of lead teachers in nonprofit centers have less than 18 hours of education in early childhood while only one-third (34%) of lead teachers in for-profit centers have less than 18 hours.

The number of teachers who are interested in online coursework and those who are currently engaged in online courses has remained consistent since 2010. This suggests that while fewer than half of all lead teachers in Travis County currently have a degree, many are hoping attain one and may require an alternative to traditional college education.

Difference in Early Childhood Credits by Center Type



Interest in Online Education



TEACHER WAGES

Centers were asked to give the range of salaries that full-time, lead teachers received. The numbers varied greatly across centers with starting salaries at the low-end of the scale ranging from \$8.50 per hour to \$16.83 per hour. Maximum salaries were similarly varied, ranging from \$9.25 per hour to \$24 per hour. Across all centers, the average bottom salary was \$10.67 per hour and the average top salary was \$14.07 per hour, which has remained steady since 2014.

Full-time, for-profit centers had a lower range of average salaries (\$10.47 to \$12.94) than their full-time, nonprofit counterparts (\$10.88 to \$15.09) and ultimately paid less in average maximum wages. Additionally, East and Central Austin childcare centers had a higher minimum and maximum average of wages (\$10.98 to \$15.32 and \$11.10 to \$14.22 respectively) while South Austin had a lower minimum and maximum (\$9.86 to \$12.88).

"We are fortunate to have many staff who have committed to early childhood as their careers.. The challenge for them is supporting families on a non-livable wage.

- Center Director, West Austin

- Average Minimum Wage
- Range of Wages
- Average Maximum Wage

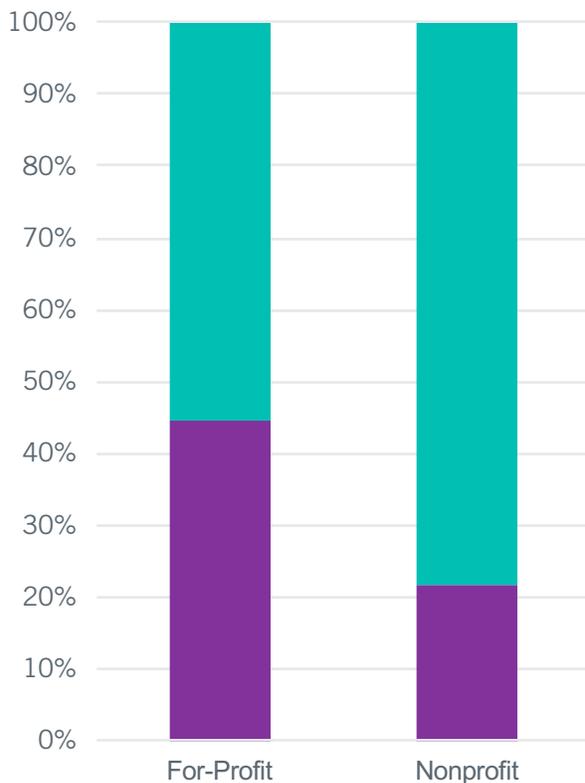
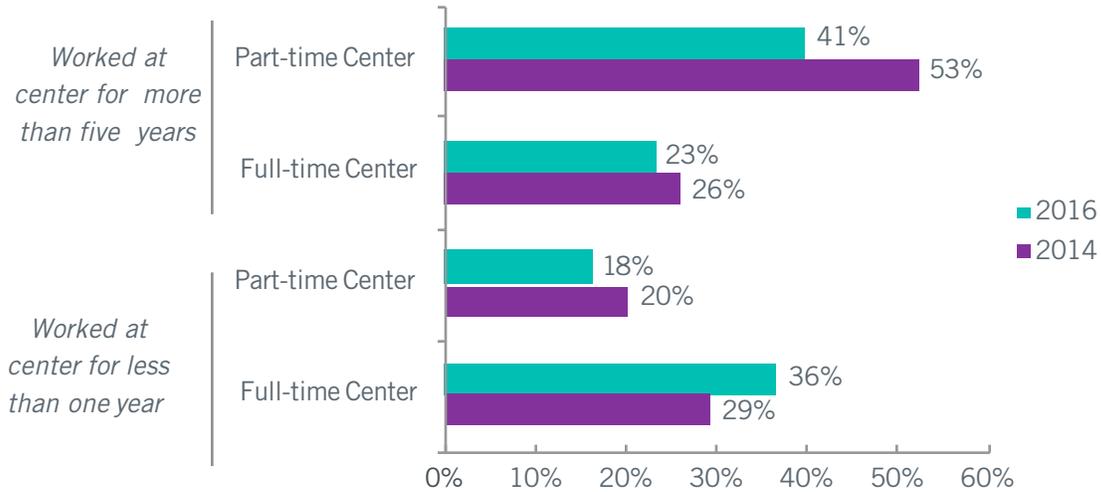
Average Wages by Type of Center



Average Wages by Region



TEACHER RETENTION

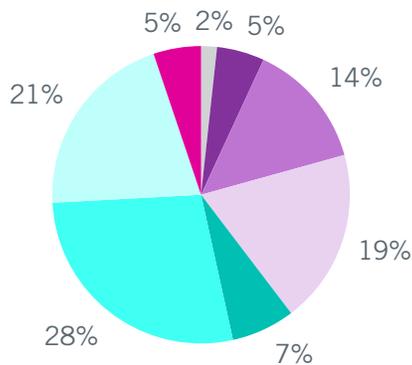
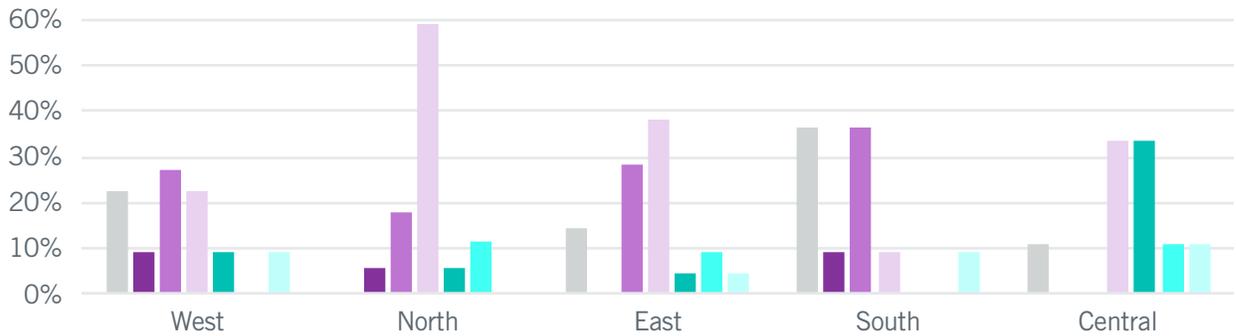
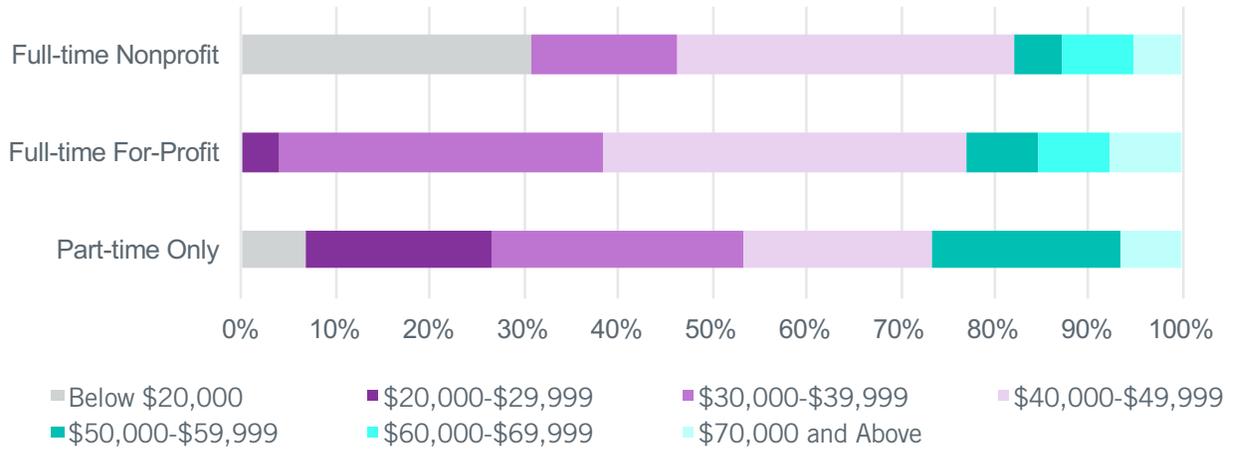


Overall, long-term teacher retention has decreased over the past two years. The percent of teachers with more than 5 years at their center has fallen for both part-time and full-time centers while the number of those with less than a year at their center has grown for full-time centers and stayed relatively steady for part-time.

For-profit centers had a higher percentage of teachers who had only been at the center less than a year. 56% of teachers at for-profit centers had been at the center for more than a year compared to 78% of teachers at nonprofit centers.

■ Worked at Center for More Than 1 Year
 ■ Worked at Center for Less Than 1 Year

DIRECTOR SALARIES AND EDUCATION



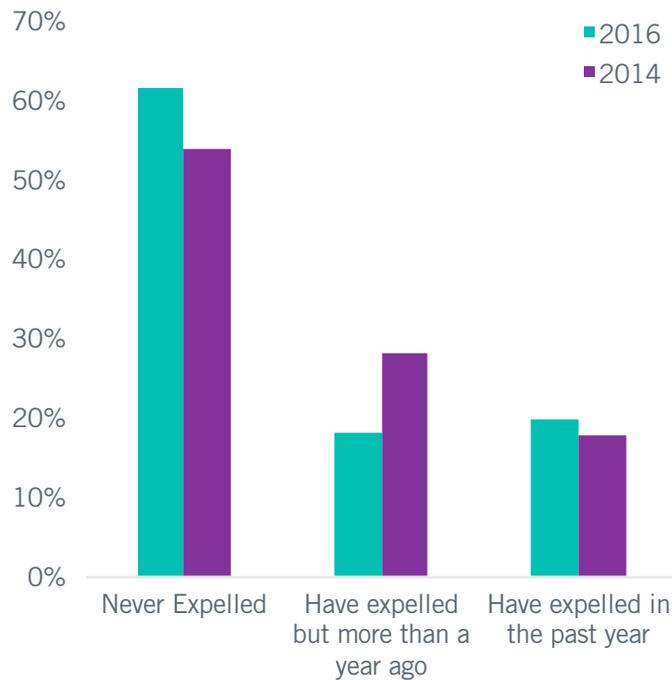
While the number of center directors making \$40,000 and above is in the 50% - 60% range across all three types of centers, the number of full-time, nonprofit center directors making below \$20,000 is at an alarming 30%.

Overall 48% of center directors have a four-year degree or higher in early childhood education with only 2% having no early childhood-related education at all.

DISENROLLMENT

Of the centers who responded to the questions about disenrollment, 62% report having never expelled a student from their program. Of the 38% that have expelled in the past, 20% did so this past year. Of the centers that expelled this year, the numbers were evenly dispersed by region.

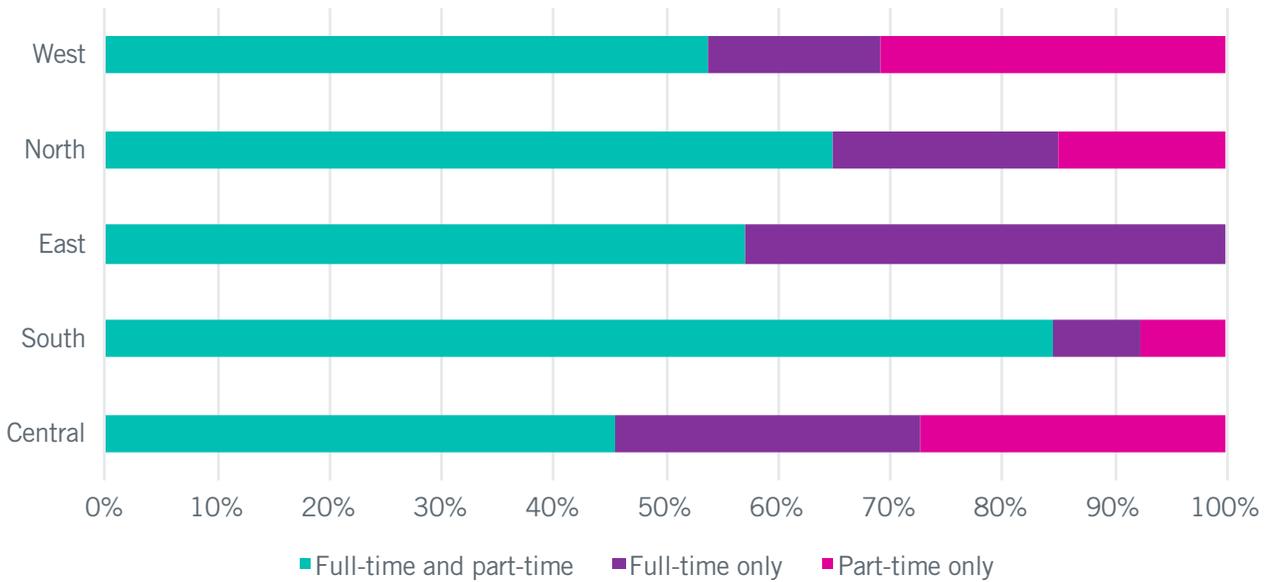
Disenrollment in Early Care and Education Centers



A photograph of a woman with long brown hair holding a young girl in a park. The woman is wearing a grey t-shirt with a graphic and white pants. The girl is wearing a blue sleeveless top, dark pants, and sandals. The background is a grassy area with trees and a building. The image has a teal color cast.

APPENDIX

Part-time Versus Full-Time: Regional Breakdown



Ownership and Sponsorship

Center types varied heavily depending on whether they were full or part-time and whether or not they had nonprofit status. Overwhelmingly, full-time for-profit centers were independently owned and operated while part-time centers were consistently sponsored by churches or religious organizations.

The greatest variation occurred within full-time nonprofit centers, where the majority of centers are run by a nonprofit board of directors or contracted through other organizations.

	Independently owned and operated	Contract	Franchise	Parent cooperative	Nonprofit with Board of Directors	Sponsored by a church or religious organization	Sponsored by a state or local governmental agency	Sponsored by a university or college
Full-time For-profit	81%	0%	14%	0%	0%	0%	5%	0%
Full-time Nonprofit	0%	31%	0%	0%	41%	15%	10%	3%
Part-time	0%	0%	0%	7%	7%	80%	0%	7%

More than 50% More than 25%

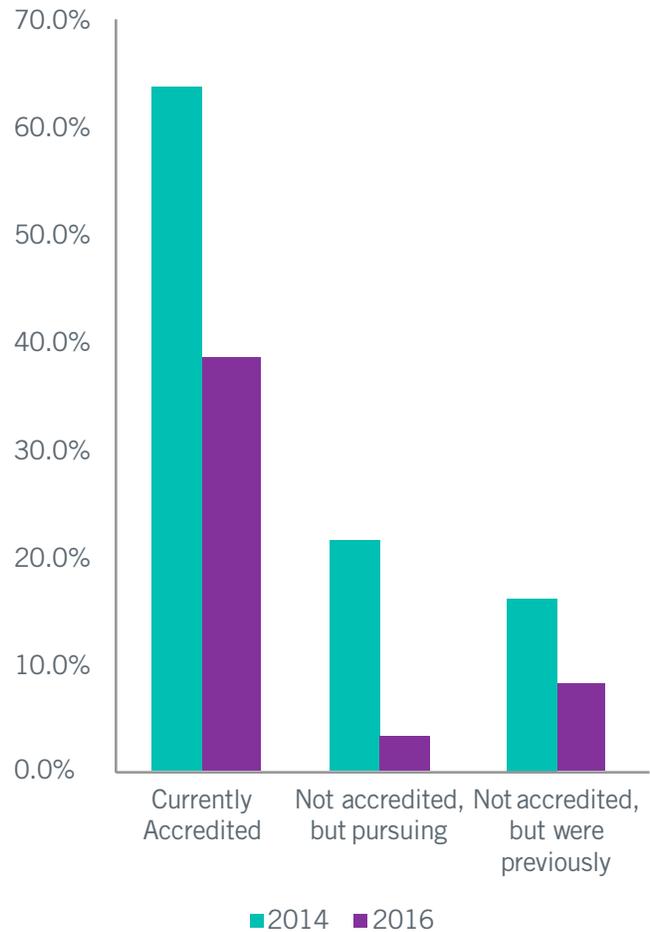
CENTER QUALITY

Quality Ratings

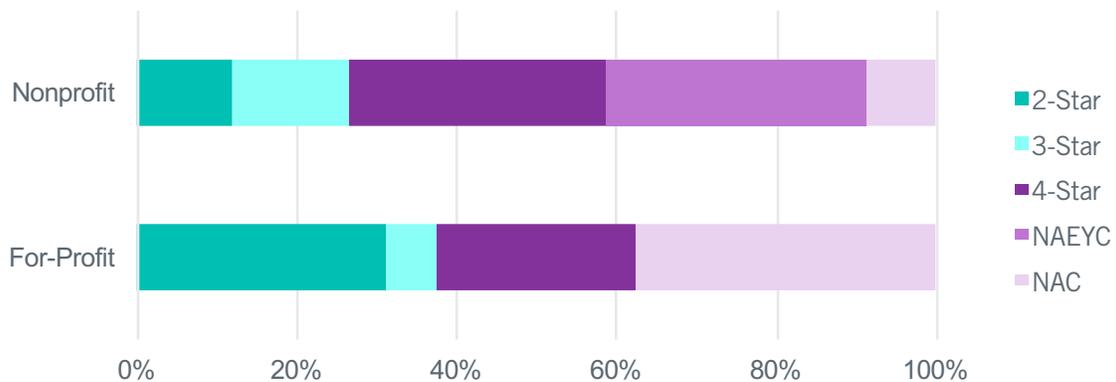
In 2016, 38% of all centers surveyed reported being accredited to meet the quality standards set by NAEYC, NAC, or Texas Rising Star (TRS), a significant decrease from 63% in 2014. The percentage of centers accredited remains the same when separated out by for-profit or nonprofit status. The number of centers pursuing accreditation dropped significantly from 22% to 3%. These drops are not unexpected due to the recent changes in the TRS standards and rating system as a result of HB 376.

Over 50% of both nonprofit and for-profit centers are a part of Texas Rising Star. While 32% of all accredited nonprofit centers are NAEYC certified no accredited for-profit centers have this accreditation; 38% of all accredited for-profit centers are NAC accredited compared to 9% of all accredited nonprofit centers.

Certified or Accredited Centers



Certification by Center Type





United Way for Greater Austin

Photography

Photos courtesy of Lauren Lesley Photography: laurenlesleyphotography.com
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United Way for Greater Austin



United Way for Greater Austin

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