Early Childhood Education Program and Workforce Needs Assessment

Preliminary Synopsis April 2023

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REM Center
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Table of Contents

Emerging Considerations 2023 Needs Assessment

As a result of the 2023 Needs Assessment focused on Early Childhood Education Programs and Workforce, the following considerations have emerged and will be further developed in Phase 2 of this work (April-December 2023).

- While there was a net gain of 87 child care centers between 2019 and 2022, this represents a series of closings and openings across this period. There was loss of about 545 child care facilities between 2019 and 2022, not including the 217 CERDEP (4K) facilities removed from licensing database due to a policy change. About 629 new facilities opened between 2019 and 2022, but about 79 new facilities are no longer operating as of 2022. There was a net gain of about 61 family child care facilities between 2019 and 2022. About 262 new family child care facilities opened between 2019 and 2022, but about 48 are no longer operating.

- Shifts in early childhood education providers may impact communities (as children and families must find new arrangements), workforce (loss of experienced educators/transition of educators to other sites or out of field), and in some cases, the need for higher levels of supports from a variety of sources including SC Division of Early Care and Licensing.

- Compared to 2018, there were 920 fewer child care workers, 1,370 fewer preschool teachers, 70 more kindergarten teachers, and 50 more directors/administrators in early education settings than in 2021 (U.S. Bureau of Labor Statistics). This may be based on COVID-19 and workforce supply and demand.

- Median wages for most categories of early childhood educators have increased slightly since 2018. Overall, kindergarten teacher median salaries decreased between 2018 and 2021, which may be based on retirements or departures of teachers with higher levels of experience and education (U.S. Bureau of Labor Statistics).

- Statewide medians salaries for 2021 were $10.73 for child care workers; $13.25 for preschool teachers; $48,650 for kindergarten teachers; and $22.09 for directors/administrators. In 2018, statewide median wages were $9.41 for child care workers; $11.12 for preschool teachers; $51,480 for kindergarten teachers; and $18.70 for director/administrator (early ed. settings) (US Bureau of Labor Statistics).

- In the 12 regions of South Carolina, median child care worker wages ranged from $9.94 to $11,29; median preschool teacher wages ranged from $10.62 to $14.93; median kindergarten teacher salaries ranged from $46,650 to $61,180; and median director/administrator (early ed. settings) ranged from $19.27 to $22.31 in 2021 (U.S. Bureau of Labor Statistics).

- Wages differ depending on the age level of children with preschool teachers and kindergarten teachers paid at higher rates than child care workers based on U.S. Bureau of Labor Statistics. Child care workers and preschool teachers are below the 2021 South Carolina overall median hourly wage ($17.91) and annual salary ($37,250). In addition, these hourly wages and annual salaries are below living wages estimates in South Carolina of $16.73 for one adult with no children; $31.33 for one adult with one child; $39.13 for one adult with two children; and $50.56 for one adult with three children (https://livingwage.mit.edu/states/45)

- Among those active in SC Endeavors, 97% are female, and 49.5% identify as White, 43% as Black, 4.2% as Hispanic or Latino, and less than 1% identify as Asian, American Indian or Alaska Native, or Native Hawaiian or Pacific Islander; of those who reported demographic information in SC Endeavors, the highest percentages of directors and primary care providers are Black and the highest percentages of teachers, assistant teachers, floaters, substitutes, and assistant directors are white.

- About half (50.5%) of the workforce who reported an education level in SC Endeavors (7,669) has earned an associate's degree, bachelor's degree, master's degree, or doctorate; About half (49.5%) of the early care and education workforce has not yet earned a degree (associate's or beyond).

- Among those active in SC Endeavors who reported the area of their degree (1,866), 53,7% reported early childhood education (40.9%) or a related field (12.8%)

- For the most part, wages or salaries of those active in SC Endeavors are related to education level with those with higher credentials or degrees earning higher wages..

- Workforce registry (SC Endeavors) participation varies by location with urban/suburban areas having the highest number of participants as may be expected; a full analysis by population will be conducted to determine areas of lower-than-expected participation.

- Mechanisms to increase trust and voice of the early care and education workforce are needed to fully understand entry into the field, movement within the field, exit from the field, and wellbeing of educators.

- Geographical unit used for this analysis are statewide figures of child care supply. Child care access is based on child care availability within a proximal distance from a parent's home or work and the supply of child care in that community that transcends census tracts and even counties.

Early Childhood 2020-2023 Needs Assessment

In 2019, South Carolina was awarded a Preschool Development Grant Birth-Five (PDG). As a requirement of this grant, the PDG Needs Assessment Collaborative was established to create and implement a Birth-Five System Needs Assessment. The PDG Needs Assessment Collaborative used surveys, 15 regional meetings, and focus groups with stakeholders (parents/caregivers and organizational representatives) in all 46 South Carolina counties to identify priorities in three focus areas: early learning and development, health and wellbeing, and family and community. Table 1 highlights the sources, location, timeframe, and numbers of participants in the 2019 Needs Assessment process.

Table 1: 2019 Needs Assessment Data Sources

Method	Location/Source	Timeframe	N
Regional Meetings	15 Meetings Across SC	March, April, & May 2019	440
Survey	Online, English	April 1-May 10, 2019	2,680
Focus Groups	First Steps Partnerships	April and May 2019	1,495

Priorities identified through the Needs Assessment in 2019 formed the basis of the 2019 PDG Strategic Plan and informed the Early Childhood Advisory Council (ECAC) B-5 Plan.

In 2020-2023, the PDG Needs Assessment Collaborative continued the work of the 2019 Strategic Plan and focused on parent/caregiver needs related to the 2019 Strategic Plan goals and objectives. Online surveys were available in English and Spanish and completed by almost 3,000 parents/caregivers of young children representing all 46 counties. An online survey was also piloted that asked about early childhood educator perceptions of child and family needs as well as workforce perceptions (n=358). In addition, in-depth interviews were completed with 38 parents/caregivers including mothers, fathers, grandparents, and foster parents. In late 2022, the findings from the surveys and interviews were shared at five place-based regional meetings in differing areas of the state and three online meetings to gain ideas for strategies to better meet parent/caregiver needs in these areas. About 158 people attended these meetings to work in small groups to identify strategies to meet the most pressing needs of children and families.

Table 2: 2020-2023 Needs Assessment Data Sources

Method	Location/Source	Timeframe	N
Parent/Caregiver Survey	Online, English & Spanish	August-November 2021	2,727
Interviews	Telephone/In-Person	March-May 2022	38
Early Educator Survey	Online	April-June 2022	358
Stakeholder Meetings	8 Meetings Across SC	October-December 2022	158

Technical Reports are available for the parent/caregiver survey and the early educator survey. Interview data themes were developed and are available in a forthcoming brief that includes key survey findings as well. Stakeholder meeting data are being analyzed, and we are exploring methods to gain additional feedback to prioritize the strategies based on their ability to meet pressing needs.

There were high levels of need across all three areas, but early learning and development garnered the highest percentages of parents who responded that they need some or a lot of help, highlighted in Table 3.

Table 3: Early Learning and Development Needs

Please indicate the level of help you need regarding the learning and development of your child (0-5 years old).	% Some or A Lot of Help	N
Knowing what to do for my child to be ready for kindergarten	74.7	2205
Finding community programs or services that support early learning	72.9	2189
Finding resources or materials to help my child learn at home	72.6	2212
Paying for high quality early care and education programs	71.1	2137
Identifying features of a good early care and education program	69.4	2236
Accessing high quality early care and education programs	68.3	2192
Knowing how to play with my child to promote learning	64.5	2231
Finding early care and education programs in my local area	61.8	2185
Finding information for my child's special needs (e.g., disabilities, behavioral challenges)	56.4	1720

Based on the high level of needs reported in early learning and development by parents/caregivers (Table 3) and critical urgency around the early childhood care and education workforce based on pay, working conditions, attrition, and impact of COVID-19, the Needs Assessment Collaborative recommended a greater focus on understanding and developing appropriate strategy related to the ECE workforce. Educators, children, and families are intertwined through interacting systems across time, including but not limited to contextual aspects of the microsystem, mesosystem, exosystem, and macrosystem, according to ecological systems theory and later bioecological theory developed by Bronfenbrenner (Brofenbrenner & Ceci, 1994; Tudge et al., 2021) [1]. Children and family experiences and outcomes are impacted based on the intersection of these systems (Brofenbrenner & Ceci, 1994).

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[1] Brofenbrenner, U., & Ceci, S. J. (1994). Nature-nurture reconceptualized in developmental perspective: A bioecological model. *Psychological Review, 101*(4), 568-586.

Tudge, J. R. H., Navarro, J., Merçon-Vargos, E. A., & Payir, A. (2021). The promise and practice of early childhood educare in the writings of Urie Bronfenbrenner. *Early Child Development and Care*, 191(7-8), 1079-1088.

Early Childhood Care Education 2019-2022

Using child care facilities data retrieved each year for the past four years (2019-2022), we captured stability and change in child care availability in South Carolina via point in time data on operating child care facilities in the state. Although the precise operating status of facilities (Open or Closed) varied from week to week and month to month, the existence of a child care facility in the child care licensing roster was considered to be an indication that the child care facility was operational. Child care facilities in the tables below include all center-based and home-based facilities regulated by Child Care Licensing at the Division of Early Care and Education (DECE) at the Department of Social Services (SC DSS) that are approved, registered, or licensed. These do not include 4K programs in public schools and non-profit independent schools participating in CERDEP, operating under the Department of Education and the Office of First Steps.

Child care data for this report is point-in-time data that was captured in January of each year and downloaded from the SC Child Care website (https://www.scchildcare.org/provider-search/?all=1). These priorities formed the basis of the 2019 PDG Strategic Plan and informed the Early Childhood Advisory Council (ECAC) B-5 Plan. These data reflect facilities operating the prior year; for example, January 2020 facilities were assumed to be operating during 2019.

Overall Impact on Child Care

Table 4 illustrates the overall number of child care facilities each year, which indicates a net loss of 130 facilities from 2019 (*n*=2419) to 2022 (*n*=2289). However, in 2021, a change in legislation and Child Early Reading and Development Education Program (CERDEP) Guidelines no longer requiring 4K programs in public schools to be regulated resulted in the removal of 217 facilities from the Child Care Licensing database. Since these facilities are not considered technically 'closed', by adding them back, the net gain in child care facilities during the four years is 87 facilities:(2419 - 2289) + 217= 87.

Table 4: Overall Number of Child Care Providers in 2019-2022

Year	*N*
2019	2419
2020	2395
2021	2183*
2022	2289*

*Note – 217 facilities were 'closed' in Child Care Licensing database on 07/01/21 because "beginning with the current fiscal year (2021), 4K programs in public schools and non-profit independent schools participating in CERDEP are not required to be approved, registered, or licensed by the Department of Social Services in order to participate in CERDEP."

Table 5 illustrates the overall number of child care facilities by facility type. The number of providers for child care centers and group child care has decreased. However, family child care facilities have increased since 2021.

Table 5: Overall Number of Child Care Providers by Type of Facility

Type of Facility	Year	N
Child Care Center	2019	1653
	2020	1661
	2021	1425
	2022	1477*
Family Child Care	2019	687
	2020	661
	2021	688
	2022	748
Group Child Care	2019	79
	2020	73
	2021	70
	2022	64

The total facilities in 2022 does not include the 217 facilities that were 'closed' based on the CERDEP guideline shift noted above. Including these facilities that continue to operate results in a total of 1694 child care centers in 2022.

We categorized facilities into two types across the four years: 2019 Facilities were operational in 2019, and any facility that opened after 2019 was considered new. Of the 2,422 facilities in 2019, 72% (n = 1,739) have continued operations in 2022 (Table 6). The same information aggregated by the type of facility is presented in Table 7.

Table 6: Overall Operation of Child Care Providers in 2019-2022

	Operating in 2022	Not Operating in 2022	Total
2019 Facilities	1739	683	2422
Facilities Opened after 2019	550	79	629
Total	2289	762	3051

Table 7: Overall Operation of Child Care Providers by Type of Facility

	N
Child Care Center	
2019 Facility, Operating in 2022	1189
2019 Facility, Not Operating in 2022	465
Facility open after 2019, Operating in 2022	288
Facility open after 2019, Not Operating in 2022	31
Family Child Care	
2019 Facility, Operating in 2022	486
2019 Facility, Not Operating in 2022	203
Facility open after 2019, Operating in 2022	262
Facility open after 2019, Not Operating in 2022	48
Group Child Care	
2019 Facility, Operating in 2022	64
2019 Facility, Not Operating in 2022	15

Table 8 shows a more detailed look at stability and change across the four years. This table displays the overall number of facilities within each category. Table 9 shows this same information by type of facility.

Table 8: Detailed Status of Child Care Providers in 2019-2022

Years Open	Status	N
1	2019 Facility, Closed in 2020	173
1	Facility opened in 2021, Closed in 2022	30
1	Facility opened in 2022, Operating in 2022	262
1	Facility opened in 2020, Closed in 2021	31
2	2019 Facility, Closed in 2020	399
2	Facility opened in 2020, Closed in 2022	18
2	Facility opened in 2021, Operating in 2022	185
3	2019 Facility closed only in 2020, Operating in 2022	3
3	2019 Facility, Closed in 2022	111
3	Facility opened in 2020, Operating in 2022	103
4	Facilities Open All Four Years (2019-2022)	1736

Table 9: Detailed Status of Child Care Providers by Type of Facility in 2019-2022

Years Open		N
Child Care Center		
1	2019 Facility, Closed in 2020	86
1	Facility opened in 2021, Closed in 2022	6
1	Facility opened in 2022, Operating in 2022	120
1	Facility opened in 2020, Closed in 2021	18
2	2019 Facility, Closed in 2021	323
2	Facility opened in 2020, Closed in 2022	7
2	Facility opened in 2021, Operating in 2022	98
3	2019 Facility closed only in 2020, Operating in 2022	1
3	2019 Facility, Closed in 2022	56
3	Facility opened in 2020, Operating in 2022	70
4	Facilities Open All Four Years (2019-2022)	1188
Family Child Care		
1	2019 Facility, Closed in 2020	81
1	Facility opened in 2021, Closed in 2022	24
1	Facility opened in 2022, Operating in 2022	142
1	Facility opened in 2020, Closed in 2021	13
2	2019 Facility, Closed in 2021	73
2	Facility opened in 2020, Closed in 2022	11
2	Facility opened in 2021, Operating in 2022	87
3	2019 Facility closed only in 2020, Operating in 2022	2
3	2019 Facility, Closed in 2022	49
3	Facility opened in 2020, Operating in 2022	33
4	Facilities Open All Four Years (2019-2022)	484
Group Child Care		
1	2019 Facility, Closed in 2020	6
2	2019 Facility, Closed in 2021	3
3	2019 Facility, Closed in 2022	6
4	Facilities open all 4 years (2019-2022)	64

Overall Capacity of Child Care Providers

Table 10 illustrates the total capacity of all child care facilities. Capacity in school districts as indicated by the 45-day headcounts in November 2022 show that PreK programs in School Districts served 26,944 children in 77 school districts.

Table 10: Overall Capacity for Child Care Providers in 2019-2022

Year	Capacity
2019	191,857
2020	199,135
2021	183,499*
2022	191,406*

*The total facilities in 2022 does not include capacity in the 217 facilities that were 'closed' based on the CERDEP guideline shift noted above.

Table 11 displays the total capacity for all child care providers by facility type.

Table 11: Overall Capacity for Child Care Providers by Type of Facility

Type of Facility	Year	Capacity
Child Care Center	2019	186,856
	2020	194,539
	2021	178,621
	2022	186,257
Family Child Care	2019	4,048
	2020	3,724
	2021	4,042
	2022	4,385
Group Child Care	2019	953
	2020	872
	2021	836
	2022	764

Table 12 displays the overall capacity of child care facilities, categorized by operational status and whether the facility existed in 2019 or was new in a subsequent year.

Table 12: Overall Capacity of Child Care Providers in 2019-2022

	Capacity
2019 Facility, Operating in 2022	152,396
2019 Facility, Not Operating in 2022	39,657
Facility open after 2019, Operating in 2022	33,025
Facility open after 2019, Not Operating in 2022	2,721

Table 13 breaks down the total capacity across facility types.

Table 13: Overall Capacity of Child Care Providers by Type of Facility

	Capacity
Child Care Center	
2019 Facility, Operating in 2022	148,754
2019 Facility, Not Operating in 2022	38,286
Facility open after 2019, Operating in 2022	31,513
Facility open after 2019, Not Operating in 2022	2,450
Family Child Care	
2019 Facility, Operating in 2022	2,868
2019 Facility, Not Operating in 2022	1,192
Facility open after 2019, Operating in 2022	1,512
Facility open after 2019, Not Operating in 2022	271
Group Child Care	
2019 Facility, Operating in 2022	774
2019 Facility, Not Operating in 2022	179

Table 14 shows a more detailed look at stability and change for existing, New, Closed, and still operating facilities. Table 15 shows this same information by type of facility.

Table 14: Detailed Status of Child Care Providers in 2019-2022

Years Open	Status	Capacity
1	2019 Facility, Closed in 2020	8,227
1	Facility opened in 2021, Closed in 2022	404
1	Facility opened in 2022, Operating in 2022	14,252
1	Facility opened in 2020, Closed in 2021	1,616
2	2019 Facility, Closed in 2021	24,254
2	Facility opened in 2020, Closed in 2022	701
2	Facility opened in 2021, Operating in 2022	10,460
3	2019 Facility closed only in 2020, Operating in 2022	196
3	2019 Facility, Closed in 2022	7,176
3	Facility opened in 2020, Operating in 2022	8,313
4	Facilities Open All Four Years (2019-2022)	152,200

Table 15: Detailed Status of Child Care Providers by Type of Facility in 2019-2022

Years Open		Capacity
	Child Care Center	
1	2019 Facility, Closed in 2020	7,680
1	Facility opened in 2021, Closed in 2022	265
1	Facility opened in 2022, Operating in 2022	13,430
1	Facility opened in 2020, Closed in 2021	1,545
2	2019 Facility, Closed in 2021	23,793
2	Facility opened in 2020, Closed in 2022	640
2	Facility opened in 2021, Operating in 2022	9,955
3	2019 Facility closed only in 2020, Operating in 2022	184
3	2019 Facility, Closed in 2022	6,813
3	Facility opened in 2020, Operating in 2022	8,128
4	Facilities Open All Four Years (2019-2022)	148,570
	Family Child Care	
1	2019 Facility, Closed in 2020	476
1	Facility opened in 2021, Closed in 2022	139
1	Facility opened in 2022, Operating in 2022	822
1	Facility opened in 2020, Closed in 2021	71
2	2019 Facility, Closed in 2021	425
2	Facility opened in 2020, Closed in 2022	61
2	Facility opened in 2021, Operating in 2022	505
3	2019 Facility closed only in 2020, Operating in 2022	12
3	2019 Facility, Closed in 2022	291
3	Facility opened in 2020, Operating in 2022	185
4	Facilities Open All Four Years (2019-2022)	2,856
	Group Child Care	
1	2019 Facility, Closed in 2020	71
2	2019 Facility, Closed in 2021	36
3	2019 Facility, Closed in 2022	72
4	Facilities open all 4 years (2019-2022)	774

Early Childhood Education Workforce

The early childhood education workforce is comprised of a multitude of positions within public schools and private settings such as public schools, child care centers, family child care homes, and group child care. In addition, paid and unpaid family, friend, and neighbor care is a component of the early childhood workforce. Based on the mixed delivery system, it can be difficult to capture all individuals involved in the early childhood workforce. Four sources were used to better understand the South Carolina early childhood workforce:

2018 Workforce Study (Rao et al., 2018)
2022 Pilot Workforce Study (Fan et al., 2022)
2018-2021 U.S. Bureau of Labor Statistics Occupational and Wage Statistics
2023 SC Endeavors Workforce Registry Analysis

Information related to these four sources is reported and provides the data used for considerations related to the early childhood education workforce.

2018 Workforce Study

In 2018, South Carolina developed and administered an early childhood workforce survey (Rao et al., 2018). This survey sought details about the working conditions of early childhood educators in a variety of settings. More than 4,000 early educators responded to the survey working in the following settings. Table 16 identifies those who identified their workplace setting.

Table 16: 2018 Workforce Study Respondents by Setting

Setting	Number	Percentage
Child Care Center	2,393	61%
Public School 4K	662	17%
Early Head Start/Head Start	498	13%
Family Child Care	208	5%
School-Age/Out of School	146	4%
Group Child Care	42	1%
Total	3,949	100%

About 57% of survey respondents were white, 39% were Black or African American, 2% were American Indian/Alaska Native, 1% were Asian, and 0.3% were Native Hawaiian/Pacific Islander. Some respondents indicated multiple races/ethnicities.

Among the early childhood educators who responded to the survey, 68% had some type of academic degree and 34% had a degree in early childhood education or related field. On average, these early childhood educators had an average of 14 years of experience. The overwhelming majority (94%) earned less than $20.00 per hour, and among those, 50% earned less than $10.00 per hour (Rao et al., 2018).

2022 Pilot Workforce Study

In Spring 2022, an early educator survey was piloted including those working with children birth through Grade 3. The survey was distributed through early childhood coordinators within approximately 80 school districts in South Carolina as well as through early care and education programs registered or licensed by the South Carolina Department of Social Services. Among 353 educators who participated in the survey, 76% were teachers or teacher assistants and 24% were directors or administrators. More than half of the educators (52.9%) were between 31 and 50 years old. About 73% of educators were white, 13.7% were Black, fewer than 1% were Hispanic/Latino (0.7%), American Indian or Alaska Native (0.7%), Asian (0.3%), and 11% did not disclose their race/ethnicity. Compared with the SC ECE workforce study (Rao et al., 2018), this survey had a higher percentage of white participants and a lower percentage of Black participants.

More than three quarters of the educators (76.1%) had more than 10 years of experience in education. More than two-thirds of the educators (68.9%) had a master's or doctoral degree. Eighty-seven percent of the directors/administrators and 65% of the teachers or teacher assistants had a master's or doctoral degree. It is important to note that about 84% of the educators who responded to this survey worked in a public primary/elementary school (4K-2nd Grade or above) setting.

Table 17: 2022 Pilot Survey Demographics

Variable		N	%
Position	Teacher/Assistant Teacher	268	75.9
	Director/Administrator	85	24.1
Age	25 or below	12	4.1
	26-30	22	7.5
	31-40	64	21.8
	41-50	91	31.1
	51 or above	88	30.0
	Prefer not to disclose	16	5.5
Race/ Ethnicity	White	215	73.6
	Black	40	13.7
	Hispanic/Latino	2	0.7
	American Indian or Alaska Native	2	0.7
	Asian	1	0.3
	Prefer not to disclose	32	11.0
Years of Experience	This is my first year	7	2.4
	2-3 years	13	4.4
	4-6 years	21	7.2
	7-10 years	29	9.9
	11-15 years	47	16.0
	16-20 years	57	19.5
	More than 20 years	119	40.6
Highest Degree	High school diploma or GED	4	1.4
	Associate's degree in a field other than educ	3	1.0
	Associate's degree in educ	3	1.0
	Bachelor's degree in a field other than educ	12	4.1
	Bachelor's degree in educ	69	23.6
	Master's degree	192	65.8
	Doctorate	9	3.1

Directors/administrators answered a series of questions, and it is notable that some skipped these items. About half of those who responded to these items (53.4%) indicated they had about the right number of children, and 40% indicated they did not have enough children. About 55% believed there were not enough early care and education facilities/programs in the community. Almost 90% indicated their early care and education programs participated in a quality improvement system. More than two-thirds of the directors/administrators (67.3%) indicated 4K classrooms in their schools were publicly funded (e.g., CERDEP funding, Title I funding). Most directors/administrators (70.9%) perceived families to be "very aware" of the 4K programs in their schools/districts.

Table 18: 2022 Pilot Survey Director Items

Question	Choice	N	%
How would you describe overall enrollment for your early care and education facility/program (0-8 years old)? (N=58)	Not Enough Children	23	39.7
	About the Right Number of Children	31	53.4
	Too Many Children	4	6.9
Please indicate the best response based on the community where your early care and education facility/program is located? (N=55)	There are too many early care and education facilities/programs in the community.	5	8.9
	There are enough early care and education facilities/programs in the community.	20	35.7
	There are not enough early care and education facilities/programs in the community.	31	55.4
Does your early care and education facility/program participate in a quality improvement system (CERDEP, ABC Quality, NAEYC accreditation)? (N=55)	Yes	49	89.1
	No	6	10.9
Are the 4K classrooms in your school publicly funded (e.g., CERDEP funding, Title I Funding)? (N=55)	Yes	37	67.3
	No	10	18.2
	Some but not all	8	14.5
To what extent are families in the community aware of the 4K programs in your school/district? (N=55)	Very Aware	39	70.9
	Somewhat Aware	14	25.5
	I Don't Know	2	3.6

Most of the teachers/teacher assistants (82.4%) who responded to the survey taught preschool (age 3 to 4). Most of the teachers/teacher assistants (78.6%) had one additional adult working with children in their classrooms across the day. Most of the teachers/teacher assistants (79.5%) had between 16 and 20 children enrolled in their classes. Slightly more than half of the teachers/teacher assistants (56.7%) perceived their current class as having about the right number of children, and 43.3% considered their current overall class size as too large.

Table 19: 2022 Pilot Survey Teacher Items About Class Size

Question	Choice	N	%
How many children are enrolled in your class currently? (N=254)	15 or fewer	30	11.8
	16-20	202	79.5
	21 or more	22	8.7
How would you describe your current overall class size? (N=261)	About the Right Number of Children	148	56.7
	Too Many Children	113	43.3

Table 20: 2022 Pilot Survey Teacher Items About Their Ability to Meet Needs of Children

Aspect	Not at all able (%)	Somewhat able (%)	Able (%)	Mostly Able (%)	Extremely Able (%)	Mean (1-5 Scale)
Academic Needs	1.0	16.5	22.2	38.7	21.6	3.63
Physical Needs	0.0	19.4	24.8	38.1	17.8	3.54
Social and Emotional Needs	1.6	24.1	26.0	38.1	10.2	3.31
Health and Wellness Needs	1.0	25.1	28.3	33.7	12.1	3.31
Overall Efficacy						3.45

About half of the educators (49%-57%) selected the following as their top challenges in meeting the needs of the children in their settings: Serving Students with Developmental, Social, or Physical Needs; Engaging Parents and Caregivers; Having Enough Time for Instruction and Planning; and Adequate Teacher Pay and Benefits.

Table 21: 2022 Pilot Survey Teacher Items About Greatest Challenges

Aspect	N	%
Serving Students with Developmental, Social, or Physical Needs	167	57.4
Engaging Parent and Caregivers	149	51.2
Having Enough Time for Instruction and Planning	149	51.2
Adequate Teacher Pay and Benefits	143	49.1
Adequate Additional Programs or Materials for Children	80	27.5
Gaining Access to Meaningful Professional Development (e.g., support/funding/leave)	47	16.2
Having Support (Administrative, Collegial)	36	12.4
Meeting State/District/School Policies and Requirements	34	11.7
Providing Technology (broadband, devices) in Homes or Schools	30	10.3
Other (Please describe)	26	8.9
Providing Transportation (students able to get to school)	12	4.1

2018-2021 U.S. Bureau of Labor Statistics Workforce Data

Each year, the U.S. Bureau of Labor Statistics provides information about a variety of positions and their accompanying wages through the *Occupations and Wage Statistics* reporting. This section highlights aspects of these data to better understand the South Carolina early care and education workforce as well as their earnings.

State Data

Table 22: 2018-2021 SC Early Care and Education Positions Reported by US BLS

Position	2018 Number	2019 Number	2020 Number	2021 Number
Child care worker	6,700	6,160	5,630	5,780
Preschool teacher	5,940	5,560	4,210	4,570
Kindergarten teacher	2,120	2,090	3,010	2,190
Admin/Dir. child care	540	510	510	590

Table 23: 2018-2021 SC Early Care and Education Wages by Position Reported by US BLS

Position	2018 Hourly Wage	2018 Annual Salary	2019 Hourly Wage	2019 Annual Salary	2020 Hourly Wage	2020 Annual Salary	2021 Hourly Wage •	2021 Annual Salary •
Child care worker	$9.41	$19,570	$9.37	$19,480	$9.71	$20,210	$10.73	$22,310
Preschool teacher	$11.12	$23,130	$11.05	$22,990	$12.05	$25,060	$13.25	$27,570
Kindergarten teacher	*	$51,480	*	$53,770	*	$46,450	*	$48,650
Admin./Director	$18.70	$38,900	$18.11	$37,660	$19.02	$39,560	$22.09	$45,950
All SC Occupations	$16.23	$33,750	$16.68	$34,690	$17.36	$36,100	$17.91	$37,250

Median hourly wage and annual salary reported as available; *not reported • methodological update

Regional Data

The US Bureau of Labor Statistics has identified 12 regions that include one or more South Carolina counties. Ten of these regions include all South Carolina counties and two include bordering counties in Georgia or North Carolina. Statistics are provided for each region including number of positions in four areas and 2021 regional wages for these positions.

Table 24: 12 SC Regions by County Identified by U.S. BLS

Region	South Carolina Counties
Augusta GA/SC	Aiken, Edgefield
Charleston-North Charleston	Berkely, Charleston, Dorchester
Charlotte	Chester, Lancaster, York
Columbia	Calhoun, Fairfield, Kershaw, Lexington, Richland, Saluda
Florence	Darlington, Florence
Greenville-Anderson-Mauldin	Anderson, Greenville, Laurens, Pickens
Hilton Head-Bluffton-Beaufort	Beaufort, Jasper
Myrtle Beach-Conway	Brunswick, Horry
Spartanburg	Spartanburg, Union
Sumter	Sumter
Northeast (non-metro))	Chesterfield, Clarendon, Colleton, Dillon, Georgetown, Hampton, Lee, Marion, Williamsburg
Upper Savannah	Abbeville, Cherokee, Greenwood County, McCormick, Oconee
Lower Savannah	Allendale, Bamberg, Barnwell, Newberry, Orangeburg

Table 25: Low Country/Coast Early Care and Education Positions

Position	Charleston	Hilton Head	Myrtle Beach
Child care worker	930	160	380
Preschool teacher	970	120	440
Kindergarten teacher	340	230	230
Admin/Director-early ed.	*	*	50

Table 26: Low Country/Coast Early Care and Education Wages

SC Region	Childcare Worker		Preschool Teacher		Kindergart.Teacher	Director/Admin	
	Hourly	Annual	Hourly	Annual	Annual	Hourly	Annual
Charleston	$11.05	$22,980	$13.63	$28,350	$61,850	*	*
Hilton Head	$11.28	$23,470	$11.32	$23,550	$50,130	*	*
Myrtle Beach	$10.81	$22,490	$13.25	$27,560	$47,860	$20.68	$43,010

Table 27: Midlands Early Care and Education Positions

Position	Augusta Metro	Columbia	Lower Savannah	Sumter
Child care worker	1130	740	190	180
Preschool teacher	470	630	100	130
Kindergarten teacher	300	210	70	*
Admin/Dir-early ed.	50	80	*	*

Table 28: Midlands Early Care and Education Wages

SC Region	Childcare Worker		Preschool Teacher		Kindergart.Teacher	Director/Admin	
	Hourly	Annual	Hourly	Annual	Annual	Hourly	Annual
Augusta	$10.46	$21,750	$14.93	$31,050	$61,180	$22.13	$46,030
Columbia	$10.80	$22,460	$11.10	$23,090	$48,660	$22.31	$46,400
Lower Sav	$10.08	$20,970	$10.62	$22,090	$46,650	*	*
Sumter	$10.46	$21,760	$13.22	$27,490	*	*	*

Table 29: Pee Dee and Northeast Early Care and Education Positions

Position	Florence	Northeast SC
Child care worker	230	220
Preschool teacher	230	340
Kindergarten teacher	100	110
Admin/Director-early ed	30	30

Table 30: Pee Dee and Northeast Early Care and Education Wages

SC Region	Childcare Worker		Preschool Teacher		Kindergart.Teacher	Director/Admin	
	Hourly	Annual	Hourly	Annual	Annual	Hourly	Annual
Florence	$9.94	$20,680	$11.43	$23,770	$48,450	$19.98	$41,560
Northeast	$10.06	$20,920	$14.29	$29,720	$60,320	$20.27	$42,150

Table 31: Upstate (including CLT Metro) Early Care and Education Positions

Position	Charlotte Metro	Greenville	Spartanburg	Upper Savannah
Child care worker	3,400	1,390	270	290
Preschool teacher	3,920	860	270	170
Kindergarten teacher	840	340	170	80
Admin/Dir--early ed	500	120	60	*

Table 32: Upstate (including CLT Metro) Early Care and Education Wages

| SC Region	Childcare Worker		Preschool Teacher		Kindergart.Teacher	Director/Admin	
	Hourly	Annual	Hourly	Annual	Annual	Hourly	Annual
Charlotte	$11.29	$23,490	$14.08	$29,280	$48,670	$19.27	$40,080
Greenville	$10.73	$22,310	$11.36	$23,640	$48,650	$21.57	$44,860
Spartanburg	$10.72	$22,290	$12.79	$26,590	$48,210	$22.28	$46,340
Upper Sava.	$10.61	$22,080	$13.25	$27,570	$48,210	*	*

2023 SC Endeavors Workforce Analysis

South Carolina Endeavors is a professional development system for early childhood educators. Educators register with South Carolina Endeavors to access information about professional development and highlight their professional development and credentials. As of February 2023, there were almost 22,000 unique individuals enrolled in the registry working in positions directly serving children in educational settings on a regular basis such as teacher assistant, teacher, floater, substitute, primary care providers, assistant director, and director. The registry also serves those in a variety of other roles who are not included in this analysis who provide specialized services or training to those working with educators or children (e.g., trainer, therapy provider). The focus for this work was limited to those in roles caring for and educating the same children on a regular basis. Additional work is needed to better understand the variety of people and positions who work with educators, young children, and their families in more specialized ways.

A total of 21,881 workforce members, in roles identified for this analysis, provided a zip code of their location. They were from all 46 counties in South Carolina. The number of registered members based on county varied from 9 to 3,193 members. Counties that had more than 1,000 registered members include Greenville (3,193), Charleston (2,228), Richland (1,873), York (1,620), Berkeley (1,548), Horry (1,494), Spartanburg (1,180), and Lexington (1,085). Counties that had fewer than 50 registered members include Calhoun (9), McCormick (16), Allendale (22), Hampton (29), Abbeville (33), Saluda (37), Dorchester (42), and Union (46). In addition, a map was constructed based on the zip codes provided by the registered members, and the number of registered members based on zip code varied from one to 614 members.

Table 33: Early Childhood Workforce by County

County	N	%
Greenville	3,193	14.59
Charleston	2,228	10.18
Richland	1,873	8.56
York	1,620	7.40
Berkeley	1,548	7.07
Horry	1,494	6.83
Spartanburg	1,180	5.39
Lexington	1,085	4.96
Anderson	927	4.24
Florence	910	4.16
Aiken	598	2.73
Beaufort	543	2.48
Sumter	480	2.19
Orangeburg	321	1.47
Greenwood	317	1.45
Cherokee	268	1.22
Kershaw	265	1.21
Georgetown	264	1.21
Darlington	263	1.20
Oconee	247	1.13
Laurens	242	1.11
Marion	186	0.85
Lancaster	161	0.74
Fairfield	145	0.66
Pickens	137	0.63
Newberry	136	0.62
Colleton	118	0.54
Chester	113	0.52
Clarendon	108	0.49
Williamsburg	107	0.49
Dillon	103	0.47
Jasper	93	0.43
Chesterfield	81	0.37
Barnwell	70	0.32
Marlboro	65	0.30
Bamberg	56	0.26
Lee	52	0.24
Edgefield	50	0.23
Union	46	0.21
Dorchester	42	0.19
Saluda	37	0.17
Abbeville	33	0.15
Hampton	29	0.13
Allendale	22	0.10
McCormick	16	0.07
Calhoun	9	0.04

Figure 1. Early Childhood Workforce Map by Zip Code

Early Childhood Workforce Data by Zip Code

Number
1   614
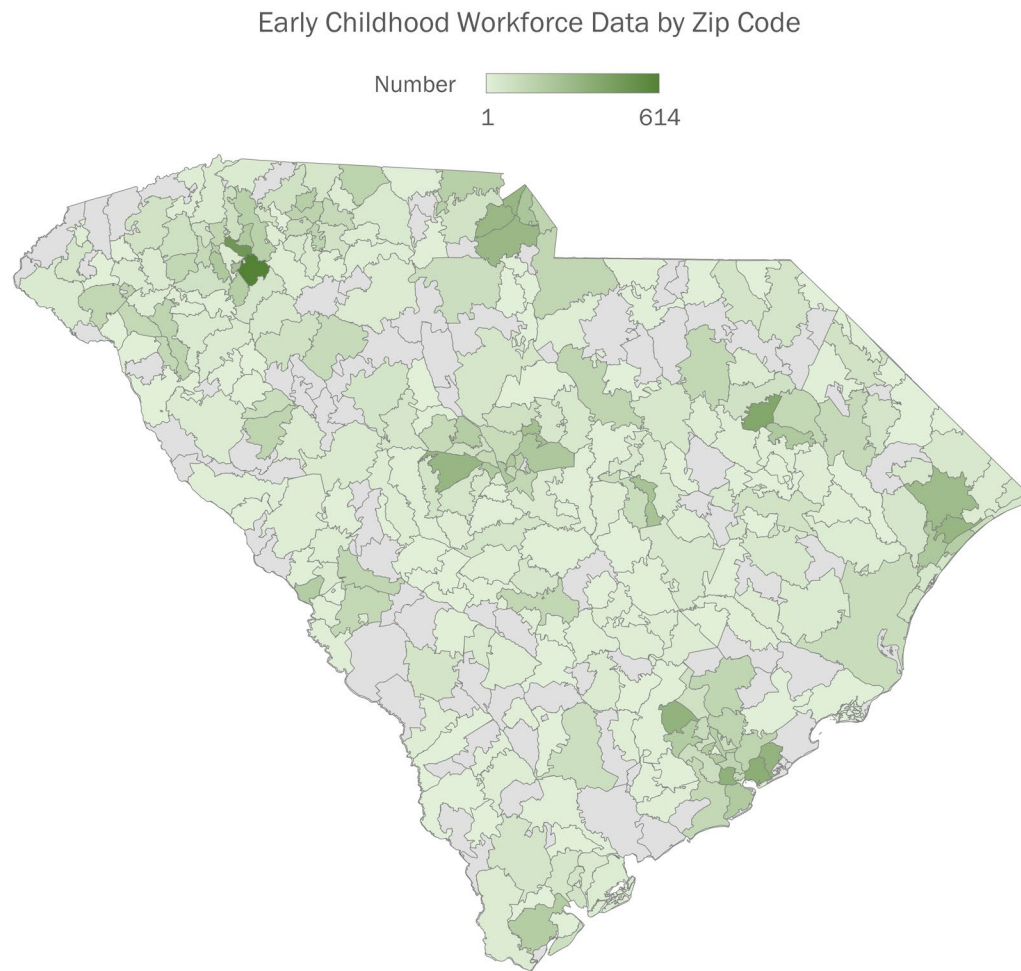
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Early Childhood Workforce Position

Among 21,925 workforce members who reported a position, 12,006 (54.8%) were teachers, 5,534 (25.2%) were assistant teachers or aides, 667 (3.0%) were floaters, 447 (2.0%) were substitutes, 2,454 (11.2%) were directors/co-directors, 749 (3.4%) were assistant directors, and 68 (0.3%) were primary care providers.

Table 34: Early Childhood Workforce Position

Position	N	%
Teacher	12,006	54.8
Assistant Teacher & Aide	5,534	25.2
Floater	667	3.0
Substitute	447	2.0
Director/Co-Director	2,454	11.2
Assistant Director	749	3.4
Primary Care Provider	68	0.3
All Positions	21,925	100.0

Figure 2: Early Childhood Workforce Position (%)
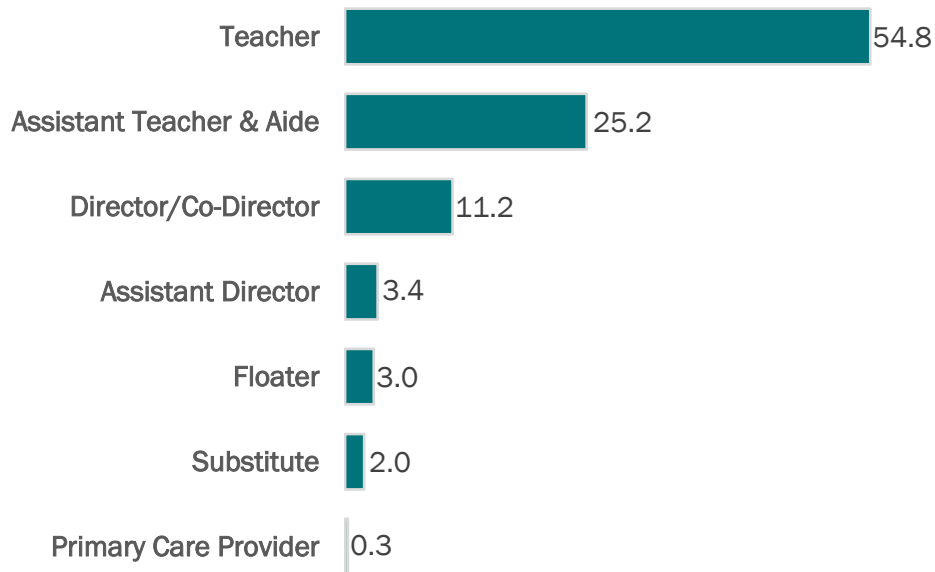
Early Childhood Workforce Organization

Among 21,925 workforce members who reported an organization, 18,037 (82.3%) worked in a child care center, 2,317 (10.6%) worked in a registered faith-based child care center, 739 (3.4%) worked in family child care home, 520 (2.4%) worked in an exempt child care center, 186 (0.8%) worked in a public school pre-k individual site, 106 (0.5%) worked in a group child care home, and 20 (0.1%) worked in a Head Start/Early Head Start site. In addition, early childhood workforce organizations are presented based on their positions in Table 36.

Table 35: Early Childhood Workforce Organization

Organization Type	N	%
Child Care Center	18,037	82.3
Registered Faith-Based Child Care Center	2,317	10.6
Family Child Care Home	739	3.4
Exempt Child Care Center	520	2.4
Public School Pre-K (Individual Site)	186	0.8
Group Child Care Home	106	0.5
Head Start/Early Head Start (Site, not Grantee)	20	0.1
All Organizations	21,925	100.0

Figure 3: Early Childhood Workforce Organization (%)
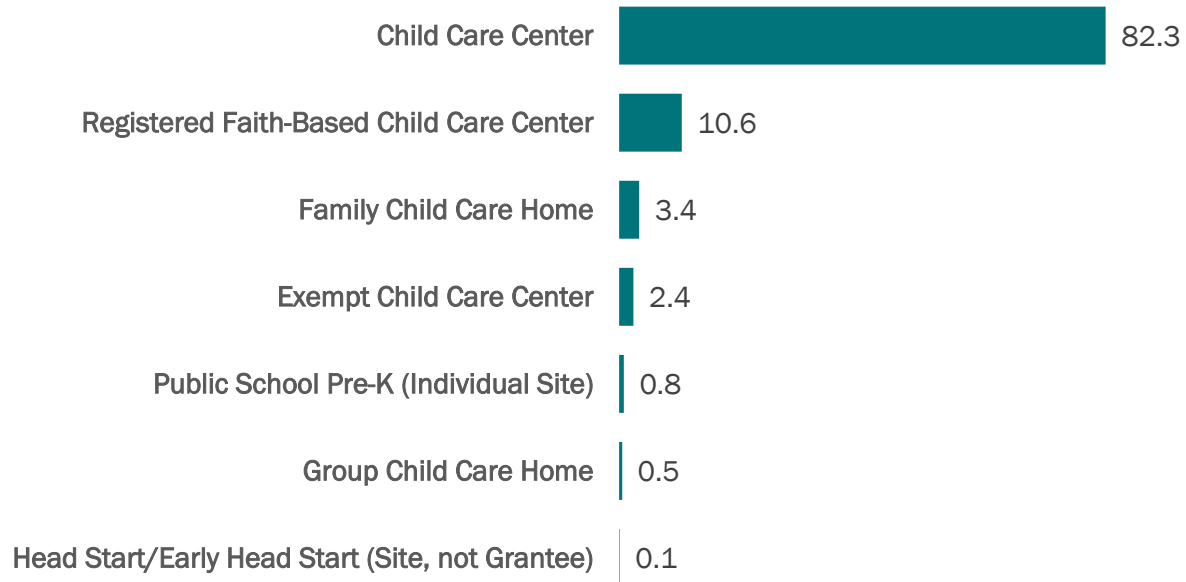

Child Care Center 82.3
Registered Faith-Based Child Care Center 10.6
Family Child Care Home 3.4
Exempt Child Care Center 2.4
Public School Pre-K (Individual Site) 0.8
Group Child Care Home 0.5
Head Start/Early Head Start (Site, not Grantee) 0.1

Table 36: Early Childhood Workforce by Organization

| Position by Organization		N	%
Teacher	Child Care Center	10,326	86.0
	Exempt Child Care Center	244	2.0
	Family Child Care Home	24	0.2
	Group Child Care Home	19	0.2
	Head Start/Early Head Start (Site, not Grantee)	12	0.1
	Public School Pre-K (Individual Site)	83	0.7
	Registered Faith-Based Child Care Center	1,298	10.8
Assistant Teacher & Aide	Child Care Center	4,667	84.3
	Exempt Child Care Center	68	1.2
	Family Child Care Home	58	1.0
	Group Child Care Home	9	0.2
	Head Start/Early Head Start (Site, not Grantee)	6	0.1
	Public School Pre-K (Individual Site)	78	1.4
	Registered Faith-Based Child Care Center	648	11.7
Floater	Child Care Center	572	85.8
	Exempt Child Care Center	15	2.2
	Registered Faith-Based Child Care Center	80	12.0
Substitute	Child Care Center	342	76.5
	Exempt Child Care Center	14	3.1
	Family Child Care Home	40	8.9
	Group Child Care Home	4	0.9
	Public School Pre-K (Individual Site)	1	0.2
	Registered Faith-Based Child Care Center	46	10.3
Director/Co-Director	Child Care Center	1,531	62.4
	Exempt Child Care Center	122	5.0
	Family Child Care Home	543	22.1
	Group Child Care Home	56	2.3
	Head Start/Early Head Start (Site, not Grantee)	2	0.1
	Public School Pre-K (Individual Site)	22	0.9
	Registered Faith-Based Child Care Center	178	7.3
Assistant Director	Child Care Center	599	80.0
	Exempt Child Care Center	57	7.6
	Family Child Care Home	16	2.1
	Group Child Care Home	8	1.1
	Public School Pre-K (Individual Site)	2	0.3
	Registered Faith-Based Child Care Center	67	8.9
Primary Care Provider	Family Child Care Home	58	85.3
	Group Child Care Home	10	14.7

Early Childhood Workforce Age

The workforce members reported an average age of 39. The average age of teachers was 39. The average age of assistant teachers or aides was 34. The average age of floaters was 33. The average age of substitutes was 45. The average age of directors/co-directors was 50. The average age of assistant directors was 41. The average age of primary care providers was 49.

Table 37: Early Childhood Workforce Age (Mean)

Position	N	Age Mean
Teacher	12,006	39
Assistant Teacher & Aide	5,534	34
Floater	667	33
Substitute	447	45
Director/Co-Director	2,454	50
Assistant Director	749	41
Primary Care Provider	68	49
All	21,925	39

Figure 4: Early Childhood Workforce Age (Mean)
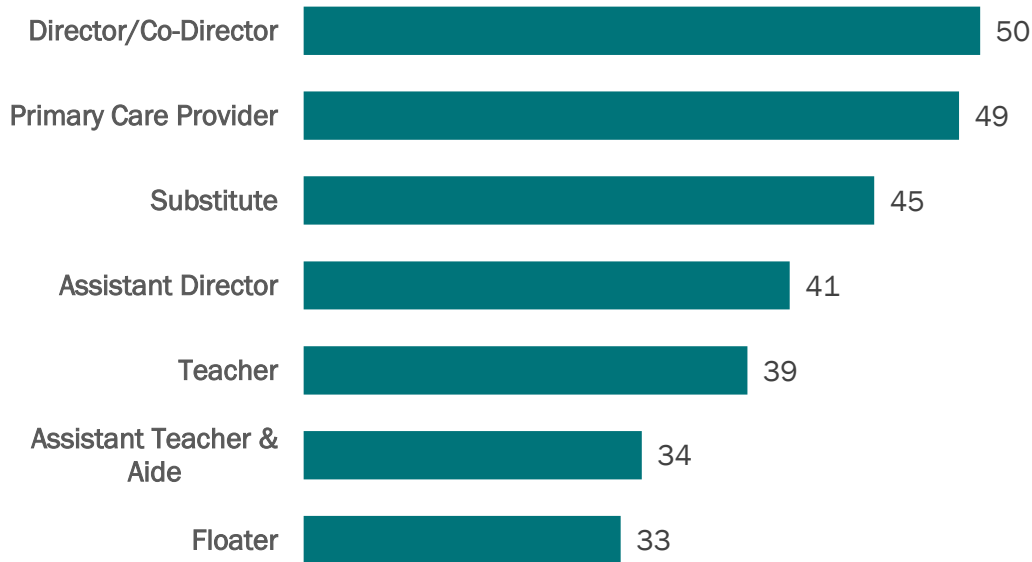
Early Childhood Workforce Gender

Among the workforce members who reported their gender identity, 10,365 (97.4%) were female, 251 (2.4%) were male, and 22 (0.2%) had an unspecified gender identity. About 97.9% of the teachers, 97% of the assistant teachers/aides, 97.3% of the floaters, and 94% of the substitutes were female. About 96.9% of directors/co-directors and 98.3% of the assistant directors were female. All of the primary care providers were female.

Table 38. Early Childhood Workforce Gender

Position	Female		Male		Unspecified	
	N	%	N	%	N	%
Teacher	5,255	97.9	106	2.0	9	0.2
Assistant Teacher & Aide	2,359	97.0	65	2.7	8	0.3
Floater	257	97.3	6	2.3	1	0.4
Substitute	188	94.0	12	6.0	0	0.0
Director/Co-Director	1,794	96.9	54	2.9	4	0.2
Assistant Director	459	98.3	8	1.7	0	0.0
Primary Care Provider	53	100.0	0	0.0	0	0.0
All	10,365	97.4	251	2.4	22	0.2

Early Childhood Workforce Race/Ethnicity

Among the workforce members who reported their race/ethnicity, 5,252 (49.5%) were White/Caucasian, 4,561 (43.0%) were Black/African American, 444 (4.2%) were Hispanic or Latino, 88 (0.8%) were Asian, 58 (0.5%) were American Indian or Alaska Native, 12 (0.1%) were Native Hawaiian or Other Pacific Islander, and 199 (1.9%) reported a non-specified/other race/ethnicity. In addition, early childhood workforce race/ethnicity are presented based on their positions.

Table 39: Early Childhood Workforce Race/Ethnicity

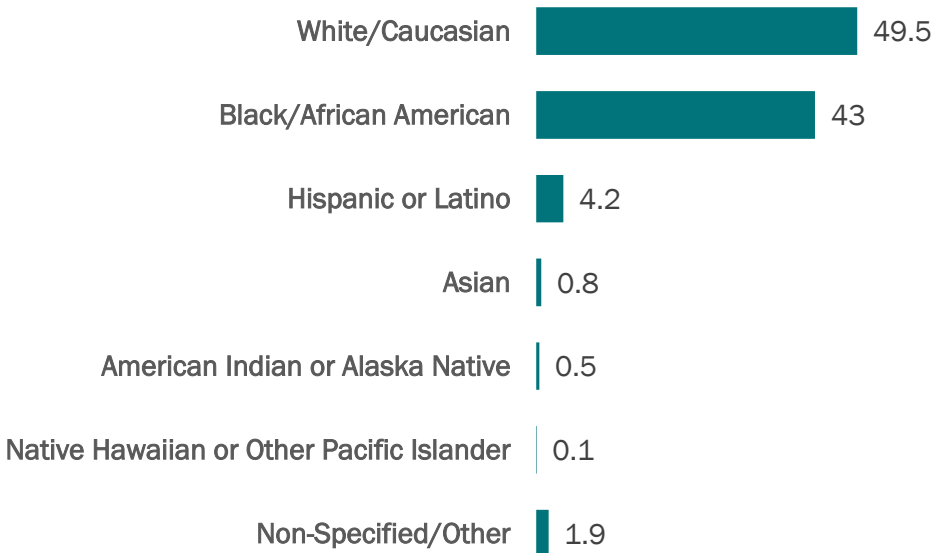| Race/Ethnicity	N	%
American Indian or Alaska Native	58	0.5
Asian	88	0.8
Black/African American	4,561	43.0
Hispanic or Latino	444	4.2
Native Hawaiian or Other Pacific Islander	12	0.1
White/Caucasian	5,252	49.5
Non-Specified/Other	199	1.9

Figure 5: Early Childhood Workforce Race/Ethnicity (%)

Table 40: Early Childhood Workforce Race/Ethnicity by Position

Position	Race/Ethnicity	N	%
Teacher	American Indian or Alaska Native	29	.5
	Asian	44	.8
	Black/African American	2,286	42.7
	Hispanic or Latino	235	4.4
	Native Hawaiian or Other Pacific Islander	4	.1
	White/Caucasian	2,650	49.5
	Non-Specified or Other	106	2.0
Assistant Teacher & Aide	American Indian or Alaska Native	17	.7
	Asian	30	1.2
	Black/African American	970	40.0
	Hispanic or Latino	135	5.6
	Native Hawaiian or Other Pacific Islander	6	.2
	White/Caucasian	1,221	50.3
	Non-Specified or Other	48	2.0
Floater	American Indian or Alaska Native	3	1.1
	Asian	5	1.9
	Black/African American	86	32.6
	Hispanic or Latino	15	5.7
	White/Caucasian	147	55.7
	Non-Specified or Other	8	3.0
Substitute	Asian	2	1.0
	Black/African American	85	42.5
	Hispanic or Latino	10	5.0
	White/Caucasian	100	50.0
	Non-Specified or Other	3	1.5
Director/Co-Director	American Indian or Alaska Native	6	.3
	Asian	4	.2
	Black/African American	911	49.3
	Hispanic or Latino	37	2.0
	Native Hawaiian or Other Pacific Islander	1	.1
	White/Caucasian	865	46.8
	Non-Specified or Other	25	1.4
Assistant Director	American Indian or Alaska Native	3	.6
	Asian	3	.6
	Black/African American	185	39.6
	Hispanic or Latino	12	2.6
	Native Hawaiian or Other Pacific Islander	1	.2
	White/Caucasian	255	54.6
	Non-Specified or Other	8	1.7
Primary Care Provider	Black/African American	38	71.7
	White/Caucasian	14	26.4
	Non-Specified or Other	1	1.9

Early Childhood Workforce First Language

Among the workforce members who reported their first language spoken, 11,380 (99%) reported English as their first language, and 118 (1%) reported a language that is different from English as their first language. About 99% of the teachers, 98.3% of the assistant teachers/aides, 98.9% of the floaters, and 97.2% of the substitutes reported English as their first language. Almost all of the directors/co-directors (99.8%) and all of the primary care providers reported English as their first language.

Table 41: Early Childhood Workforce First Language

Position	English		Non-English	
	N	%	N	%
Teacher	5,846	99.0	59	1.0
Assistant Teacher & Aide	2,562	98.3	43	1.7
Floater	278	98.9	3	1.1
Substitute	209	97.2	6	2.8
Director/Co-Director	1,940	99.8	4	0.2
Assistant Director	491	99.4	3	0.6
Primary Care Provider	54	100.0	0	0.0
All	11,380	99.0	118	1.0

Among the 411 workforce members who reported a second language spoken, 197 (47.9%) reported Spanish as their second language, 92 (22.4%) reported English as their second language, and 31 (7.5%) reported American Sign Language as their second language. In addition, French, Russian, and German were second languages with between 2.2% and 2.9% of speakers.

Table 42: Early Childhood Workforce Second Language

Second Language	N	%
Spanish	197	47.9
English	92	22.4
American Sign Language	31	7.5
French	12	2.9
Russian	11	2.7
German	9	2.2
Portuguese	8	1.9
Other	6	1.5
Other - Asian	6	1.5
Tagalog	6	1.5
Arabic	5	1.2
Hindi	5	1.2
Other - European	4	1.0
Korean	3	0.7
Chinese	2	0.5
Gullah/Geechee	2	0.5
Italian	2	0.5
Japanese	2	0.5
Other - African	2	0.5
Urdu	2	0.5
Greek	1	0.2
Polish	1	0.2
Serbo-Croatian	1	0.2
Vietnamese	1	0.2
Total	**411**	**100.0**

Early Childhood Workforce Education

Among the workforce members who reported an education name (n=7,669), 35 (0.5%) reported having a doctorate, 737 (9.6%) had a master's degree, 1,809 (23.6%) had a bachelor's degree or teacher certification (national board certification, in-state certification/license, out-of-state certification/license), 1,292 (16.8%) had an associate degree, 1,840 (24.0%) had a CDA certification/diploma or some college, and 1,956 (25.5%) had one or more credentials (e.g., South Carolina Director Credential, South Carolina Special Needs Credential, American Montessori Society, ABC Family Child Care Credential). In addition, early childhood workforce education names are presented based on their positions.

Table 43: Early Childhood Workforce Education

Education Name	N	%
SC Credential	1,956	25.5
CDA/Some College	1,840	24.0
Associate	1,292	16.8
Bachelor/Teacher Certification	1,809	23.6
Master	737	9.6
Doctorate	35	0.5

Figure 6: Early Childhood Workforce Education (%)
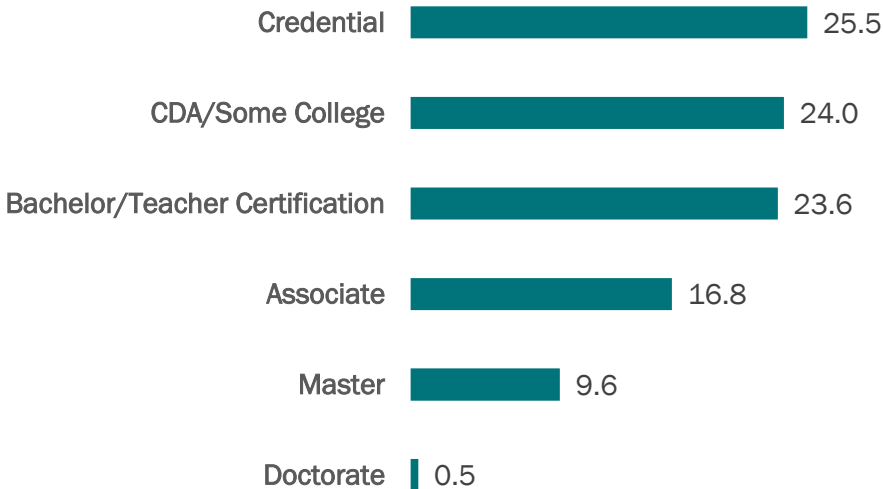
Table 44: Early Childhood Workforce Education by Position

| Education by Position		N	%
Teacher	SC Credential	1,193	30.1
	CDA/Some College	835	21.1
	Associate	667	16.9
	Bachelor/Teacher Certification	926	23.4
	Master	327	8.3
	Doctorate	9	0.2
Assistant Teacher & Aide	SC Credential	269	18.3
	CDA/Some College	541	36.7
	Associate	280	19.0
	Bachelor/Teacher Certification	307	20.8
	Master	75	5.1
	Doctorate	1	0.1
Floater	SC Credential	31	22.8
	CDA/Some College	44	32.4
	Associate	21	15.4
	Bachelor/Teacher Certification	36	26.5
	Master	4	2.9
Substitute	SC Credential	26	20.6
	CDA/Some College	32	25.4
	Associate	16	12.7
	Bachelor/Teacher Certification	38	30.2
	Master	13	10.3
	Doctorate	1	0.8
Director/Co-Director	SC Credential	323	20.6
	CDA/Some College	275	17.6
	Associate	246	15.7
	Bachelor/Teacher Certification	414	26.4
	Master	284	18.1
	Doctorate	24	1.5
Assistant Director	SC Credential	110	28.9
	CDA/Some College	100	26.3
	Associate	56	14.7
	Bachelor/Teacher Certification	81	21.3
	Master	33	8.7
Primary Care Provider	SC Credential	4	12.9
	CDA/Some College	13	41.9
	Associate	6	19.4
	Bachelor/Teacher Certification	7	22.6
	Master	1	3.2

Early Childhood Workforce Major

Among the 1,866 workforce members who reported a major, 764 (40.9%) reported having an early childhood specific major, 238 (12.8%) reported having a major that is related to early childhood, and 864 (46.3%) reported having a major that is not related to early childhood.

Table 45: Early Childhood Workforce Major

Major	N	%
Early Childhood Specific	764	40.9
Not Related	864	46.3
Related	238	12.8
All	1,866	100.0

Figure 7: Early Childhood Workforce Major (%)
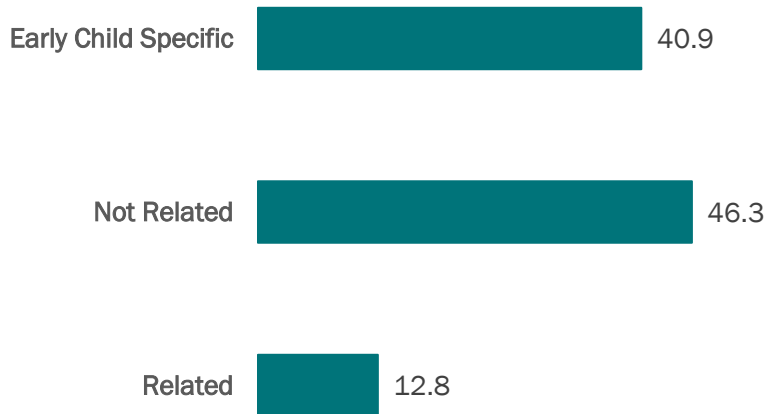
Early Childhood Workforce Salary

Overall, the workforce members who reported earning an annual salary had a median annual salary of $30,000. The workforce members who reported earning an hourly wage had a median hourly wage of $11.7.

Salary by Position

Among the workforce members who reported earning an annual salary, directors/co-directors reported the highest median annual salary ($38,000), followed by assistant directors ($35,000), teachers ($30,000), and floaters ($28,074). Comparatively, substitute ($5,000), primary care providers ($17,000), and assistant teachers/aides ($18,219) reported lower median annual salary. Among the workforce members who reported earning an hourly wage, directors/co-directors reported the highest median hourly wage ($15.0), followed by assistant directors ($14.0), primary care providers ($12.5), and teachers ($12.0). Comparatively, substitute ($10.0), assistant teachers/aides ($11.0), and floaters ($11.5) reported lower median hourly wage.

Table 46: Early Childhood Workforce Salary by Position

Position	Annual Salary Median ($)	Hourly Wage Median ($)
Teacher	30,000	12.0
Assistant Teacher & Aide	18,219	11.0
Floater	28,074	11.5
Substitute	5,000	10.0
Director/Co-Director	38,000	15.0
Assistant Director	35,000	14.0
Primary Care Provider	17,000	12.5
Overall	**30,000**	**11.7**

Figure 8: Early Childhood Workforce Salary by Position (Median Annual Salary, $)

Position	Median Annual Salary ($)
Director/Co-Director	38,000
Assistant Director	35,000
Teacher	30,000
Floater	28,074
Assistant Teacher & Aide	18,219
Primary Care Provider	17,000
Substitute	5,000
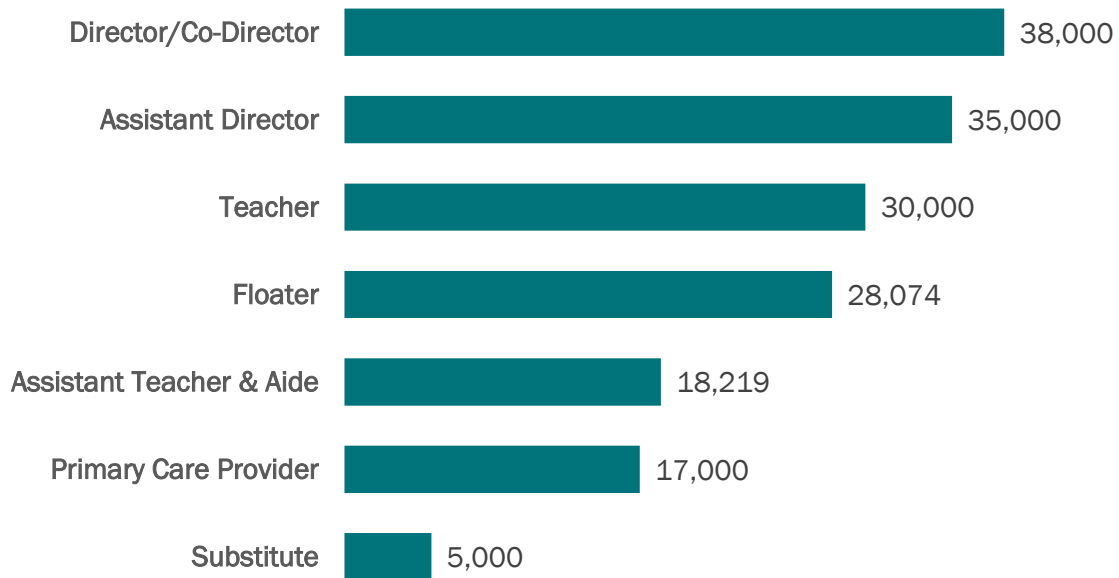
Figure 9: Early Childhood Workforce Salary by Position (Median Hourly Wage, $)

Position	Median Hourly Wage ($)
Director/Co-Director	15.0
Assistant Director	14.0
Primary Care Provider	12.5
Teacher	12.0
Floater	11.5
Assistant Teacher & Aide	11.0
Substitute	10.0
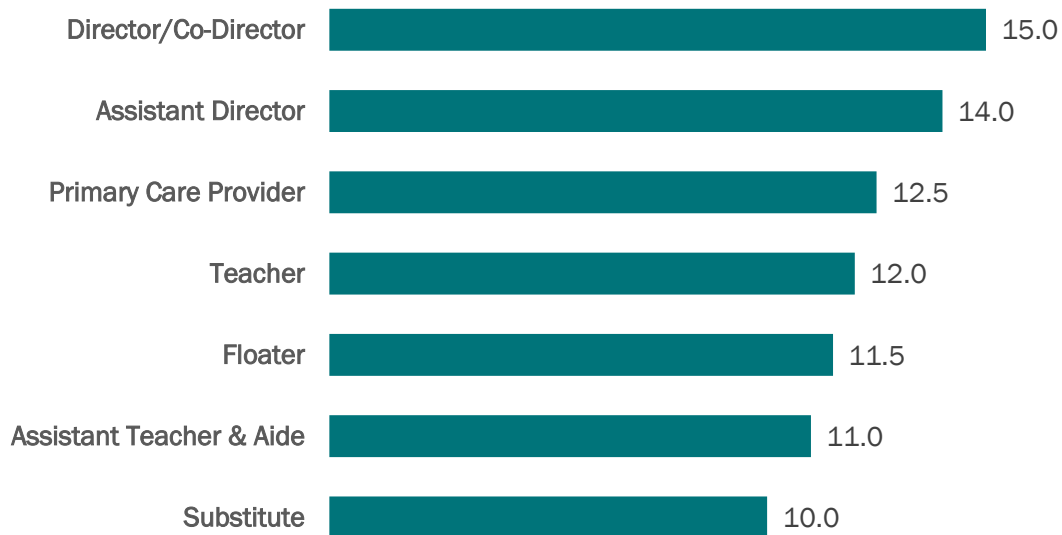
Salary by Education

The workforce members' salary was compared based on their education. Among those who reported earning an annual salary, those who had a doctorate reported the highest median annual salary ($46,120), followed by those who had a master's degree ($40,000), those who had a bachelor's degree or teacher certification ($34,000), and those who had a CDA or some college ($31,000). Comparatively, those who had credentials ($25,200) or associate degree ($27,020) reported lower median annual salary.

Among the workforce members who reported earning an hourly wage, those who had a master's reported the highest median hourly wage ($14.0), followed by those who had a doctorate ($13.6), those who had a bachelor's degree or teacher certification ($13.0), and those who had an associate degree ($12.9). Comparatively, those who had a CDA or some college ($11.3) or SC credentials ($11.8) reported lower median hourly wage.

Table 47: Early Childhood Workforce Salary by Education

Education	Annual Salary Median ($)	Hourly Wage Median ($)
SC Credential	25,200	11.8
CDA/Some College	31,000	11.3
Associate	27,020	12.9
Bachelor/Teacher Certification	34,000	13.0
Master	40,000	14.0
Doctorate	46,120	13.6

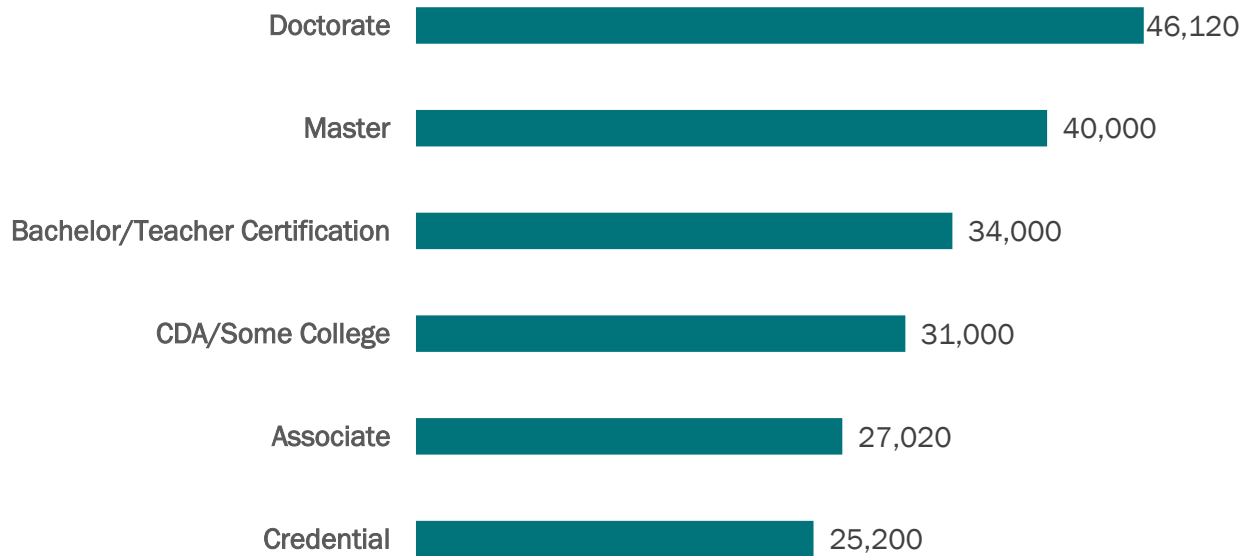**Figure 10: Early Childhood Workforce Salary by Education (Median Annual Salary, $)**

Education	Median Annual Salary
Doctorate	46,120
Master	40,000
Bachelor/Teacher Certification	34,000
CDA/Some College	31,000
Associate	27,020
Credential	25,200

Figure 11: Early Childhood Workforce Salary by Education (Median Hourly Wage, $)

Education	Median Hourly Wage
Master	14.0
Doctorate	13.6
Bachelor/Teacher Certification	13.0
Associate	12.9
Credential	11.8
CDA/Some College	11.3
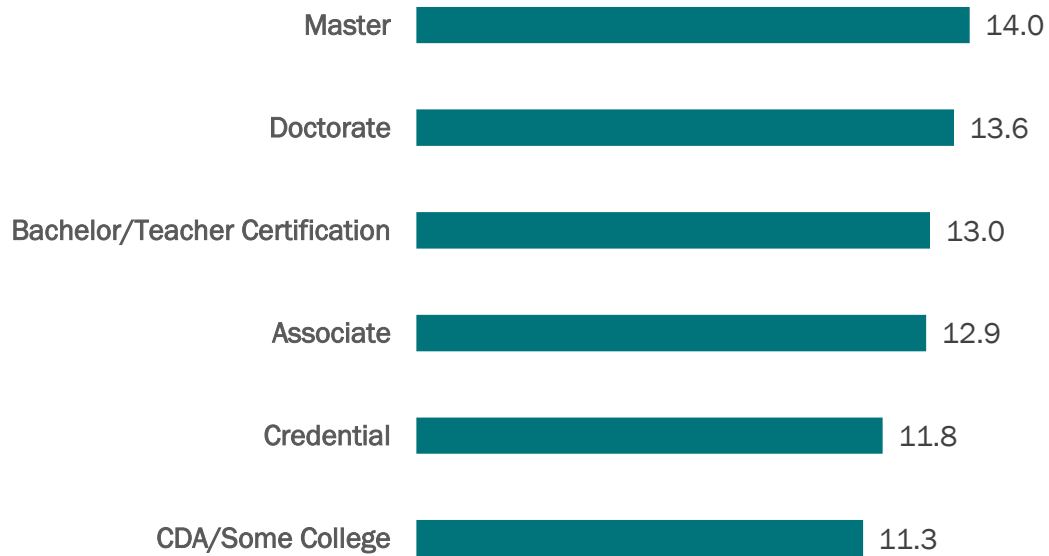
Next Steps

The authors provided a preliminary analysis of quantitative data including national and state data related to early childhood education programs and the early childhood education workforce. These analyses represent an initial step in better understanding the current conditions in South Carolina and the impact of COVID-19 on programs and the workforce. As is typical, these findings present additional questions and the need for additional data collection and analysis. It is also difficult to pinpoint the causes and situations that underlie current conditions, but COVID-19 is a plausible explanation for exacerbating some of the factors that led to closings of programs and reduction of the child care and preschool educational workforce. Phase 2 of this Needs Assessment, which will occur from April through December 2023 will involve:

- Circulating this report for feedback, conducting correlational analyses as appropriate, comparing data to population and workforce estimates by county, reviewing openings and closures related to participation in ABC Quality, and exploring regional early education program closures and openings

- Partnering with SC Department of Social Services and SC First Steps to gain qualitative data to contextualize and expand on these findings

- Gaining additional data related to 2021-22 pre-kindergarten teacher retention from the SC Teacher initiative, which is a statewide representative survey that explores retention of teachers in SC public school settings

- Analyzing 2023 strategic plans from 46 First Steps partnerships to look at early childhood education program and workforce trends from the perspectives of local partnerships

- Exploring the development and administration of an early childhood education workforce survey or using administrative datasets to better understand pay, responsibilities, education, wellbeing, and retention

- Exploring educational pathways for early childhood educators as well as opportunities and barriers within these pathways

- Seeking guidance and assistance from experts in workforce development