

# Manitoba Child Care Association

## Member Survey

### Final Report

Prepared for the:

**Manitoba Child Care Association**

December 13, 2016



RESEARCH INC.

*...for what you need to know.*

For more information on this research project, please contact:

Probe Research Inc.

Suite 850 – 125 Garry Street | Winnipeg, MB R3C 3P2

Tel: (204) 926-6565 | Fax: (204) 926-6566

E-mail: [probe@probe-research.com](mailto:probe@probe-research.com)

# TABLE OF CONTENTS

EXECUTIVE SUMMARY .....	1
1.0 BACKGROUND AND METHODOLOGY .....	2
2.0 PROFILE OF RESPONDENTS.....	4
3.0 RESEARCH FINDINGS .....	6
3.1 Weekly Child Care Working Hours .....	6
3.1.1 Hours per Week Spent on Paid Child Care Work .....	6
3.1.2 Hours per Week Spent on Unpaid Child Care Work .....	7
3.1.3 Views on Hours of Work .....	8
3.2 Child Care Work History .....	9
3.2.1 Years Spent Working in Licensed Child Care .....	9
3.2.2 Reasons for Leaving Past Employment .....	10
3.2.3 Reasons for Choosing Current Employment.....	11
3.2.4 Age of Children Cared For.....	13
3.3 Education and Professional Development .....	14
3.3.1 Child Care-Related Educational Attainment.....	14
3.3.2 Child Care-Related Educational Attainment by Job Classification.....	15
3.3.3 Prevalence of Post-Secondary Upgrading .....	16
3.3.4 Participation in Professional Development.....	17
3.3.4 Non-Participation in Professional Development .....	19
3.4 Work Experience and Satisfaction .....	20
3.4.1 Views on Value of Work .....	20
3.4.2 Views on Additional Aspects of Work.....	21
3.4.2 Satisfaction with Aspects of Work.....	22
3.4.3 Overall Job Satisfaction.....	23
3.4.4 Views on Future Employment in Child Care .....	24
3.5 Wages and Benefits Provided to Child Care Centre Employees .....	25
3.5.1 Average Hourly Wages for Child Care Centre Employees .....	25
3.5.2 Paid Vacation for Child Care Centre Employees .....	26
3.5.3 Additional Benefits Provided to Child Care Centre Employees .....	27
3.6 Views and Experiences of Family Child Care Providers .....	29
3.6.1 Child Care Tenure and Forecast.....	29

3.6.2	Weekly and Annual Hours of Operation.....	31
3.6.3	Income and Expenditures.....	33
3.6.4	Preferred Family Child Care Model.....	35
3.6.5	Views on Process of Opening Home-Base Child Care .....	36
3.7	Views and Experiences of Child Care Centre Directors .....	38
3.7.1	Experience with Staff Shortages.....	38
3.7.2	Difficulty Recruiting Key Staff .....	39
3.7.3	Reasons for Difficulty Recruiting Key Staff .....	40
3.7.4	Top Challenges for Child Care Centre Directors.....	41
3.8	Views on Possible Changes to Manitoba's Child Care Policy .....	43
3.8.1	Views on Child Care as Part of the Education System.....	43
3.8.2	Views on Child Care Policy Options .....	44
3.9	Views on MCCA Membership.....	45
3.9.1	Benefits of MCCA Membership .....	45
3.9.2	Satisfaction with MCCA .....	47

**APPENDICES: (provided separately)**

- Survey Instrument
- Detailed Tabular Results
- Respondent Verbatims

## EXECUTIVE SUMMARY

- Respondents reflected a reasonable stable and seasoned workforce. On average, respondents worked in licensed child care for nearly 15 years and the majority hadn't changed jobs in the last five years. Most expected to be still working in child care in three years.
- Child care staff generally felt positively about their work. Overall job satisfaction was very high, with the vast majority agreeing their work offers them a sense of accomplishment and respect as a professional. Child care workers also reported high levels of satisfaction with their co-workers and managers. However, many also said their work was physically taxing and often frustrating.
- Child care staff felt very positively about the quality of care their facility provides. The vast majority said their facility offers a well-rounded, up-to-date program in a high-quality environment that helps parents with resources. Family child care providers were more likely than early childhood educators to hold these positive views.
- Most child care staff surveyed are not currently upgrading their post-secondary education, but most did report pursuing some kind of professional development in the last year, largely to keep current in their profession. Among those who did not take professional development, time appeared to be the key barrier. More senior child care staff, such as directors, were more likely to report having access to training opportunities than ECEs or child care assistants.
- Wages varied considerably based on job classification, with child care assistants reporting an average hourly wage that is less than half that earned by centre directors. Only a third of those surveyed said they were satisfied with their wages, which were also a top-tier reason for leaving previous child care employment.
- MCCA members had nuanced views about bringing child care under the umbrella of the education system. They were generally supportive of bringing child care into the education system but not under the control of regional school divisions. Respondents were slightly more likely to agree that at least care for school-aged children should be the responsibility of school boards.
- Family child care providers offered an incomplete picture of their facility's finances, with a significant number being unsure of their annual revenue, expenses and deductions. Most reported offering 40 to 50 hours of care per week for an average annual revenue of \$30,000. FCCPs also reported being closed for an average of more than three weeks per year. One-half of the FCCPs surveyed had substitute care established and available to parents during closures.
- Family child care providers were split on the process and paperwork involved in opening their facility. One-third said the process was easy. One-third said the process was difficult. One-third were neutral on the question.
- Directors reported particular difficulty recruiting inclusion facilitators and ECEs, especially those with management skills. Directors reported frequently filling in for absent staff. One-half reported operating with a conditional license due to staff shortages.
- Finance-related challenges, such as increasing operating costs, paying competitive wages and fundraising were top-of-mind for centre directors.
- Respondents expressed reasonably strong satisfaction with the effectiveness of the MCCA. Members most valued the training and belonging to a professional organization.

## 1.0 BACKGROUND AND METHODOLOGY

In the spring of 2016, the Manitoba Child Care Association (MCCA) engaged Probe Research to create and conduct a four-phase quantitative research program involving parents, MCCA members, the general public and Manitoba business leaders. The goal of this research was to measure awareness of, and views on, key child care issues, as well as satisfaction with the quality and availability of child care and views on possible policy options.

Taken together, this research establishes benchmarks in public and stakeholder opinion that will allow the MCCA to measure change over time. It also represents the most in-depth public opinion research undertaken in Manitoba in recent years on the issue of child care.

Key to this research is an online survey of MCCA members, including centre directors and supervisors, early childhood educators (ECEs), child care assistants (CCAs) and family child care providers (FCCPs). Specifically, this online survey of members sought to determine job satisfaction, experiences and preferences, training and education levels and views on possible policy changes affecting Manitoba's child care system. In addition, the survey sought to explore the specific experiences of family child care providers and centre directors.

This "census-style" online survey was conducted between October 6<sup>th</sup> and October 21<sup>st</sup>, 2016. The MCCA provided Probe Research with an initial contact database of approximately 3,200 regular members. Each member was provided a unique link to the online survey which allowed that member to save her responses and continue the survey at a later time, if needed.

Approximately 965 members, or 30 per cent of the total, did not have emails on file with the MCCA. In an effort to include as many members as possible, in the weeks before the survey' launch and during the field period, the MCCA encouraged members to update their contact information using the MCCA's web portal to ensure they would receive a survey invitation. These additional home email addresses were continuously provided to Probe Research throughout the data collection window.

The contact data is subject to the strict privacy provisions of the *Personal Information Protection and Electronic Documents Act* (PIPEDA).

In order to further increase compliance, the MCCA's Executive Director Pat Wege announced the upcoming online survey in a series of emails and magazine articles sent to all members. Probe Research also sent two reminders to those members who had not completed the survey as of Oct. 12<sup>th</sup> and Oct. 18<sup>th</sup>. An incentive was offered by MCCA - the chance to win a \$500 gift card. The winner of the prize has been selected and notified as of the writing of this report.

A total of 600 MCCA members completed the survey. That represents a very respectable 19 per cent response rate based on the total membership list. The margin of error on 600 is +/- 3.61%, 19 times out of 20 based on a finite population correction of approximately 3,200 members.

A detailed examination of demographic characteristics of these members is available in Sec. 2.0.

The instrument for the online survey was designed by Probe Research in close consultation with the MCCA. It was scripted into Probe Research's online software platform, *FluidSurveys* and pre-tested with approximately 10 members who completed the online version. Data

analysis was performed using SPSS, and no weighting of the data has been performed.

For more information on this research, please contact:

**Mary Agnes Welch**  
Probe Research Inc.  
Suite 850 – 125 Garry Street  
Winnipeg, Manitoba R3C 3P2  
T: 204-926-6563; C: 204-470-8862  
E: [maryagnes@probe-research.com](mailto:maryagnes@probe-research.com)

## 2.0 PROFILE OF RESPONDENTS

The following table outlines the socio-demographic make-up of MCCA members who participated in the survey.

TOTAL RESPONDENTS (n=600)					
		%			%
<b>REGION</b>			<b>GENDER</b>		
Winnipeg		71	Male		3
Non-Winnipeg		29	Female		97
<b>HOUSEHOLD INCOME</b>			<b>ETHNICITY</b>		
Less than \$60K		47	Caucasian		81
\$60K-\$100K		39	Member of a visible minority		12
\$100K-plus		14	First Nation, Inuit, Métis		7
<b>JOB CLASSIFICATION</b>			<b>AGE</b>		
Director/Manager		18	18-29		16
Supervisor/Administrator		26	30-39		30
Early Childhood Educator (ECE)		28	40-49		29
Child Care Assistant (CCA)/Trainee		16	50+		25
Family Child Care Provider (FCCP)		12			

The following illustration offers further detail on the job classification of respondents.



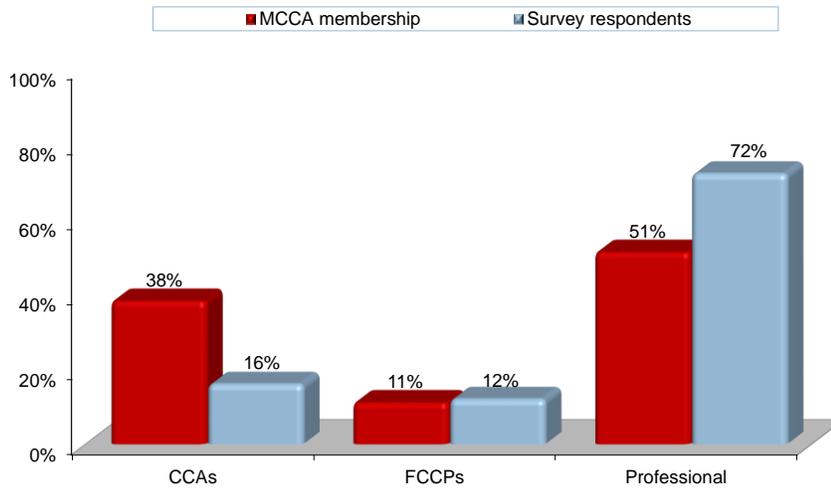
Q1. "How would you best describe your current job?" (n=600)

Base: All respondents

As the comparison below illustrates, survey respondents tended to fall into the “professional” category as determined by the MCCA’s membership database, which includes ECEs, directors, managers and administrators.

**PRBE**  
RESEARCH INC.

## Comparison of Respondents and MCCA Members



### 3.0 RESEARCH FINDINGS

The following section provides a summary of the findings of the online survey conducted among MCCA members. Some results are clustered thematically instead of in the order the questions were posed to respondents.

#### 3.1 Weekly Child Care Working Hours

This section explores the hours spent on paid and unpaid labour by child care workers of various classifications.

##### 3.1.1 Hours per Week Spent on Paid Child Care Work

An average employee working in child care spends 35.8 hours per week on paid child care work, with family care providers working the most at an average of 42 hours per week and child care assistants working the least at an average of 31.9 hours per week.



Q2. "In a typical week, how many hours do you spend on paid child care work?"

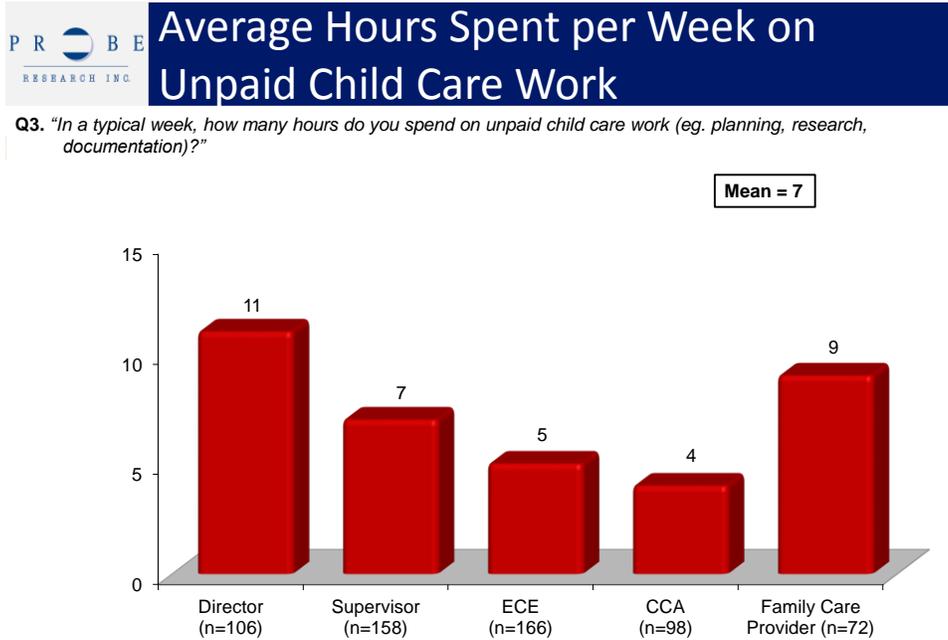
Base: All respondents

Notable variations among respondents include:

- Older respondents, those 50-plus, tended to work **fewer paid hours** per week, an average of 34 hours compared with early-middle-aged workers, those 40-49, who work an average of 36.6 hours per week.

### 3.1.2 Hours per Week Spent on Unpaid Child Care Work

Child care workers spend, on average, seven hours a week on unpaid child care work, including planning, research and documentation. In a typical week, child care centre directors spend the most time on unpaid work (11 hours, on average) while child care assistants spend the least (4 hours, on average).



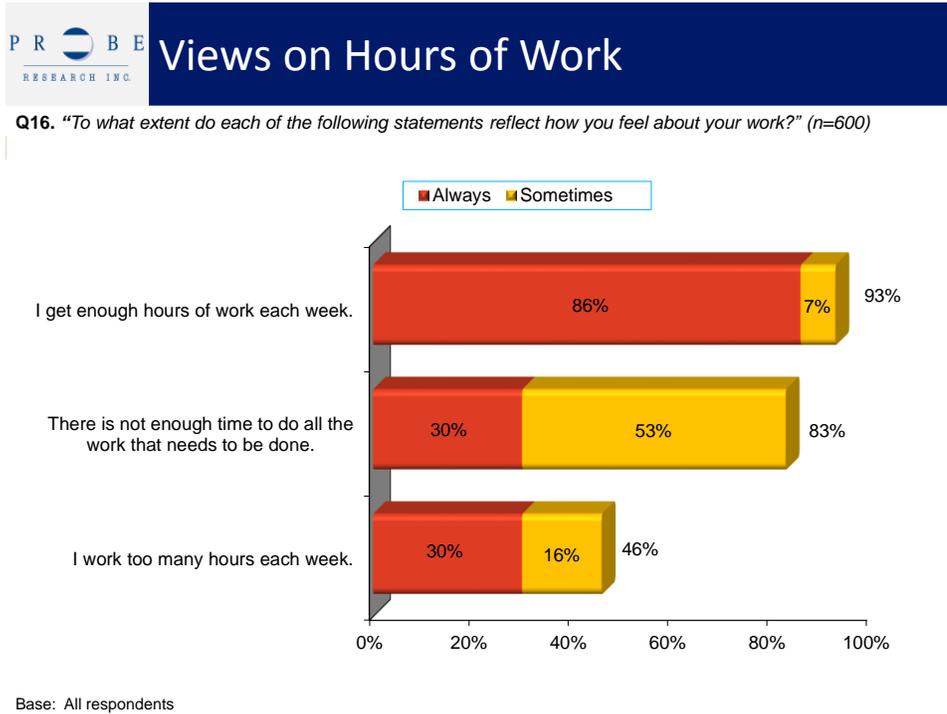
Base: All respondents

Notable variations among respondents include:

- Older respondents, those 50-plus, tended to work **more unpaid hours** per week, an average of 7.5 hours compared with younger workers, those 18-29, who reported working an average of only 5.5 unpaid hours per week.

### 3.1.3 Views on Hours of Work

MCCA members were asked for their views on their hours of work. The overwhelming majority (97%) reported getting enough hours of work each week and nearly one-half (48%) reported working too many hours per week. A significant majority (83%) agreed there isn't enough time in the day to complete all the work that needs to be done.



Notable variations among respondents include:

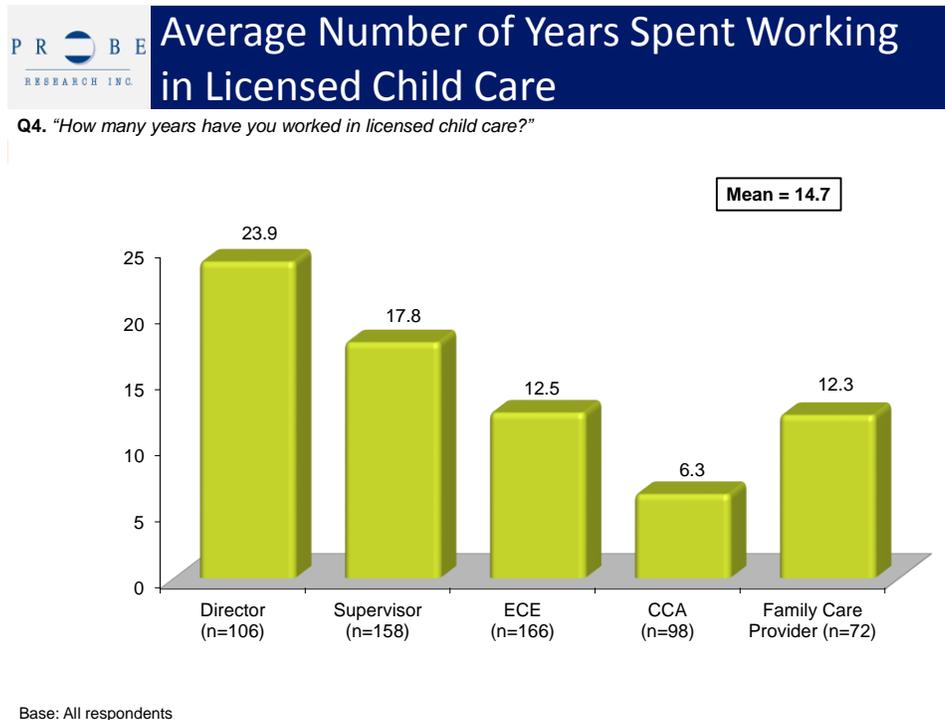
- Directors were **more likely** to report that there is never enough time to complete all required work (47% "always") compared with CCAs (16% "always") and FCCPs (19% said "always").
- Family child care providers were **more likely** to report they "always" work too many hours each week (46%) compared with ECEs (7%) and CCAs (5%).

## 3.2 Child Care Work History

This section details the years spent working in child care as well as the reasons employees left their past positions and chose their current employment.

### 3.2.1 Years Spent Working in Licensed Child Care

Respondents reported working, on average, for 15 years in licensed child care, suggesting a strongly experienced workforce. Child care assistants reported the shortest work history at 6 years, while directors reported the longest at 23 years, on average.



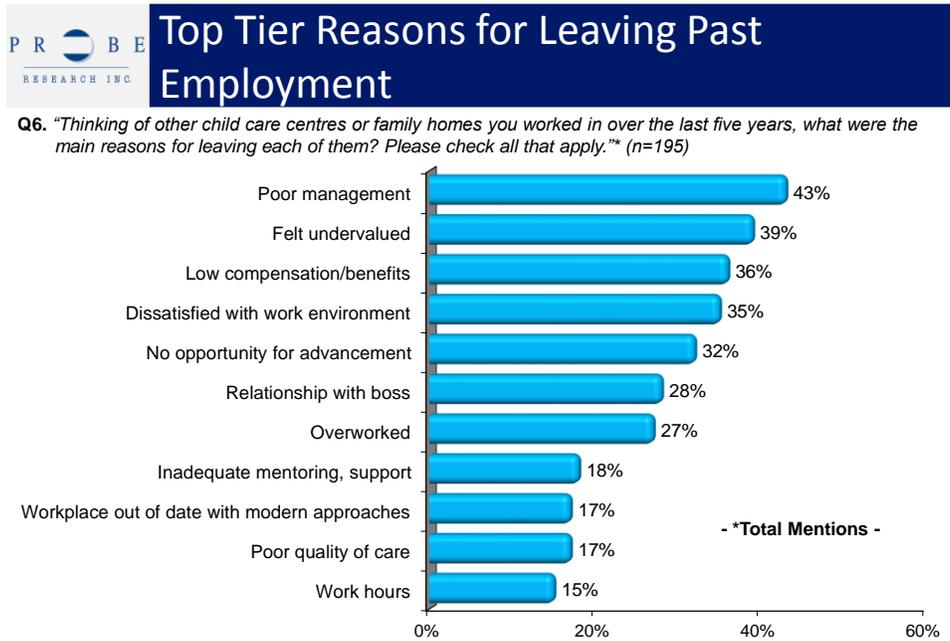
Notable variations among respondents include:

- As would be expected, older respondents, those 50-plus, reported working in licensed child care for an average of 22.6 years while younger workers, those 18-29 reported working in child care for 4.8 years.
- Licensed FCCPs were **more likely** to have worked in child care for less than four years (51%) compared with FCCPs who are ECE II or III (16%)

Respondents were also asked how many other child care centres or licensed family homes they had worked in over the last five years, not including their current employer. Two-thirds (68%) reported working only at their current centre, suggesting a reasonably high level of job stability among respondents.

### 3.2.2 Reasons for Leaving Past Employment

One-third (31%) of respondents reported working in more than one child care facility over the last five years. These respondents were asked why they chose to leave their previous job or jobs. Poor management (43%), feeling undervalued (39%), low compensation and benefits (36%) and an unsatisfactory work environment (35%) were the most common reasons mentioned by respondents.

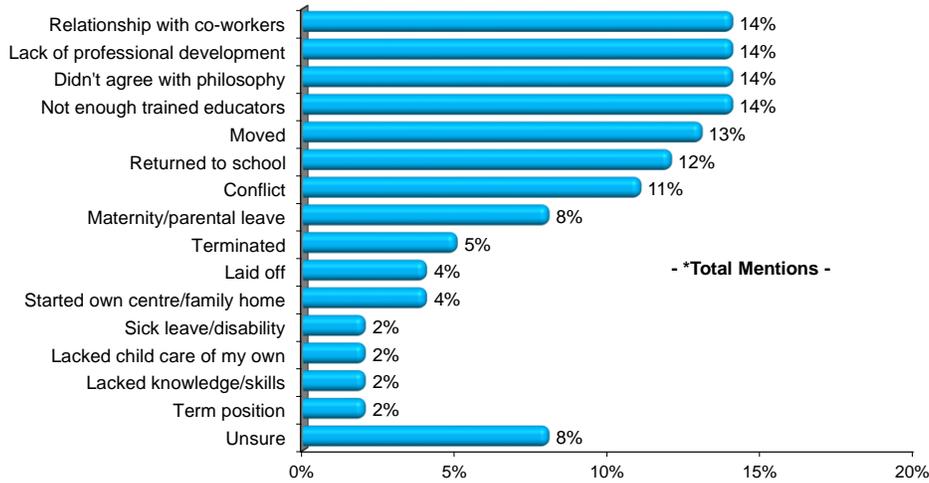


Base: Respondents employed at more than one facility in the last five years

Because of the relatively small sample size, there are few notable variations among respondents. Additional reasons for employees choosing to leave past jobs are detailed in the chart on the following page.

**PRBE RESEARCH INC.** Lower Tier Reasons for Leaving Past Employment

Q6. "Thinking of other child care centres or family homes you worked in over the last five years, what were the main reasons for leaving each of them? Please check all that apply."\* (n=195)



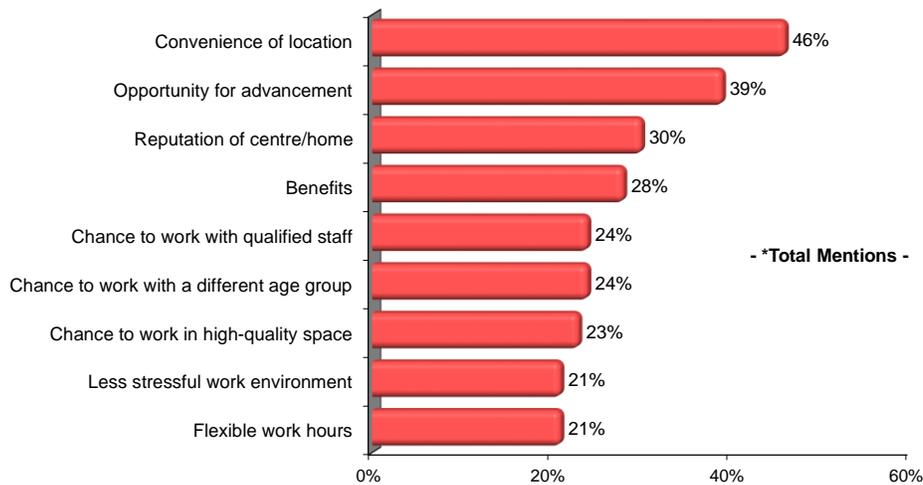
Base: Respondents employed at more than one facility in the last five years

**3.2.3 Reasons for Choosing Current Employment**

All MCCA members were asked the most important reasons for choosing their current position. Nearly one-half (46%) cited the convenience of their workplace’s location. More than one-third (39%) cited the opportunity for advancement in their current position and nearly one-third (30%) cited the reputation of the centre or family home.

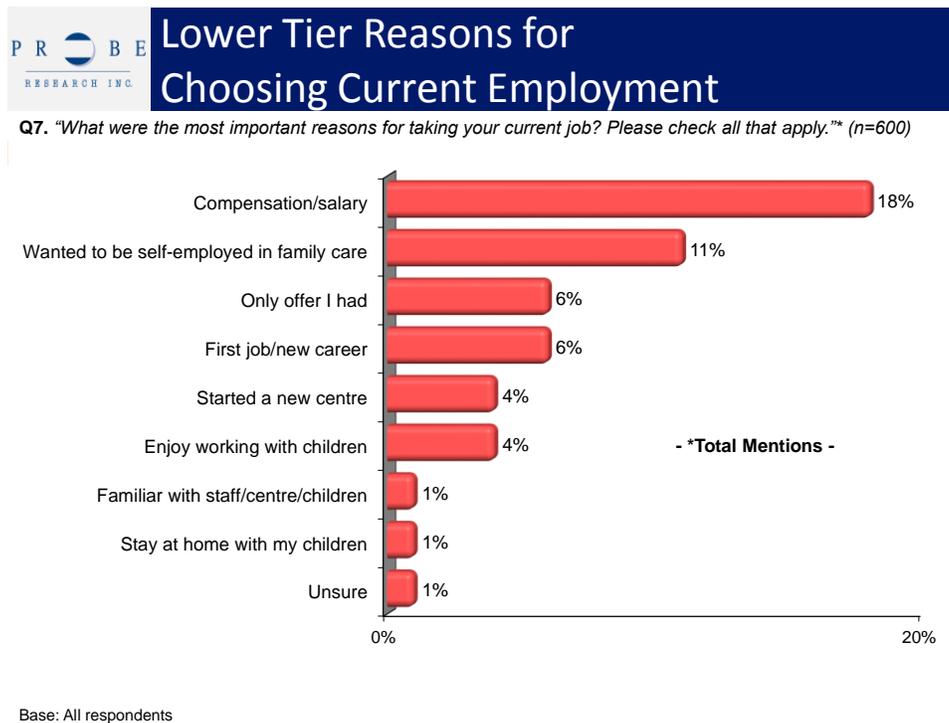
**PRBE RESEARCH INC.** Top Tier Reasons for Choosing Current Employment

Q7. "What were the most important reasons for taking your current job? Please check all that apply."\* (n=600)



Base: All respondents

Less common reasons for taking a current job are detailed in the chart below, including compensation or salary (18%) and a wish to be self-employed in family child care (11%).



Notable variations among respondents include:

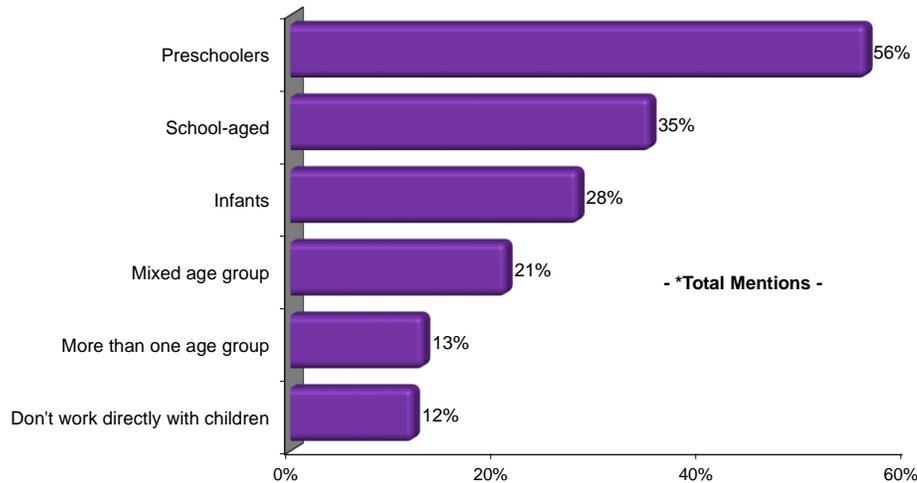
- Directors and managers were **less likely** to cite location convenience (32%) and opportunity to work with different age groups (9%) as reasons they took their current position. However, they were **more likely** to cite compensation and salary (29%) as a reason.
- Supervisors and administrators were also **more likely** to cite opportunity for advancement (61%) as a reason they accepted their current job. However, they were **less likely** to cite flexible work hours (13%).
- CCAs and trainees were **more likely** to cite location (53%) and the opportunity to work with different age groups (40%) as a top reason for taking their current position.
- ECEs were **less likely** to cite opportunity for advancement (22%) as a reason for taking their current job.
- Not surprisingly, family care providers were **less likely** to cite opportunity for advancement (17%), the reputation of the centre or home (17%), benefits (12%), salary (10%) and the opportunity to work with qualified staff (4%) as top reasons for taking their current job. However, they were **much more likely**, overwhelmingly so, to cite the desire to be self-employed in family child care (85%). Additionally, FCCPs were slightly more likely to cite flexible work hours (28%) as the reason they took their current job.
- Respondents who predict they will still be working in child care in three years were **more likely** to cite the desire to work in a high-quality, purpose-built environment as a reason for taking their current job. That compares to respondents who predict they will not likely be working in child care in three years. Only 11 per cent of those respondents cited the chance to work in a high-quality facility as a reason for accepting their current post.

### 3.2.4 Age of Children Cared For

More than one-half respondents (56%) reported working exclusively with pre-school aged children, while just over one-third (35%) reported working only with school-aged children. Nearly three-in-ten MCCA members (28%) reported working only with infants while more than one-in five respondents (21%) typically care for a mixed of age groups.



Q8. "Which age groups do you normally work with? Please check all that apply."\* (n=600)



Base: All respondents

Notable variations among respondents include:

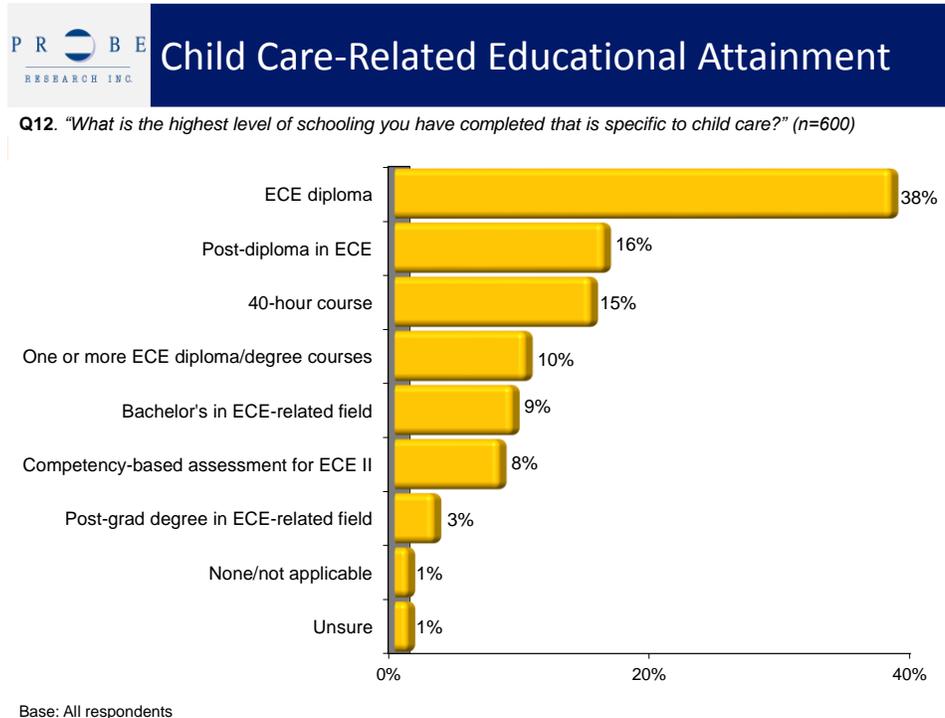
- Directors and managers were **less likely** to work with pre-schoolers (41%) but **more likely** to say they don't work regularly with children at all (39%).
- ECEs were **more likely** to work with pre-schoolers (67%) but **less likely** to school-aged children (23%) or with a mixed age group (11%).
- Family care providers were **more likely** to work with infants (57%), pre-schoolers (65%) and with a mixed age group (54%).
- Child care workers in rural Manitoba were **more likely** to report working with a mixed aged group (27%) than Winnipeg-based workers (19%).

### 3.3 Education and Professional Development

This section of the report explores MCCA members' views on, and experiences with, education and professional development.

#### 3.3.1 Child Care-Related Educational Attainment

An ECE diploma was the most common credential held by most respondents. More than one-third of members (38%) surveyed reported this level of child care-related education. One-in-six (16%) reported having a post-diploma in ECE and approximately the same proportion (15%) reported only having completed the 40-hour course.



Notable variations among respondents include:

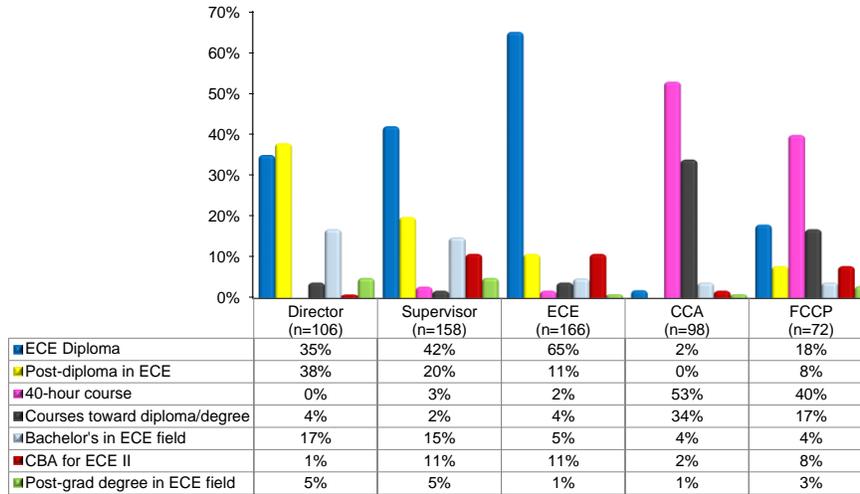
- Residents of rural Manitoba were **significantly more likely** to have an ECE diploma (44%) than Winnipeg respondents (35%).

### 3.3.2 Child Care-Related Educational Attainment by Job Classification

Directors were **more likely** to have a post-diploma in ECE (38%). CCAs were **more likely** to have only the 40-hour course (53%) or one or more college courses toward a diploma or degree (34%). FCCPs were also **more likely** to only have the 40-hour course as their top credential (40%).

**PRBE** RESEARCH INC. **Child Care-Related Educational Attainment**  
-By Job Classification-

Q12. "What is the highest level of schooling you have completed that is specific to child care?"



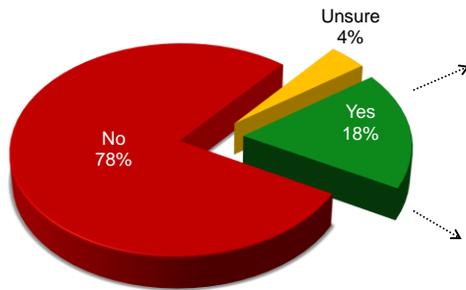
Base: All Respondents

### 3.3.3 Prevalence of Post-Secondary Upgrading

An overwhelming majority of MCCA members (78%) are not currently upgrading their education. Among those who are currently upgrading, one-third (33%) are working toward a two-year ECE diploma, while a sizeable number are pursuing ECE III or management/leadership training (24% and 22% respectively).

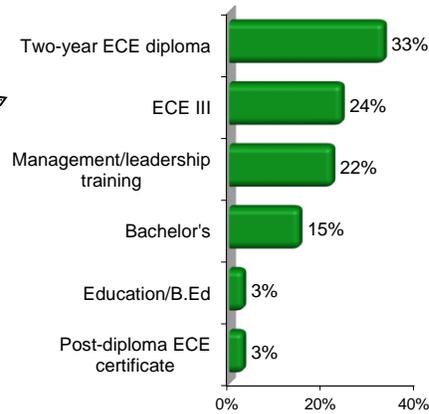
**PRESEARCH INC.** **Prevalence of Post-Secondary Upgrading**

**Q13.** "Are you currently upgrading your post-secondary education?" (n=600)



Base: All respondents

**Q14.** "What post-secondary credentials are you working towards?" (n=111)



Base: Respondents currently upgrading their education  
\*Caution: Small base

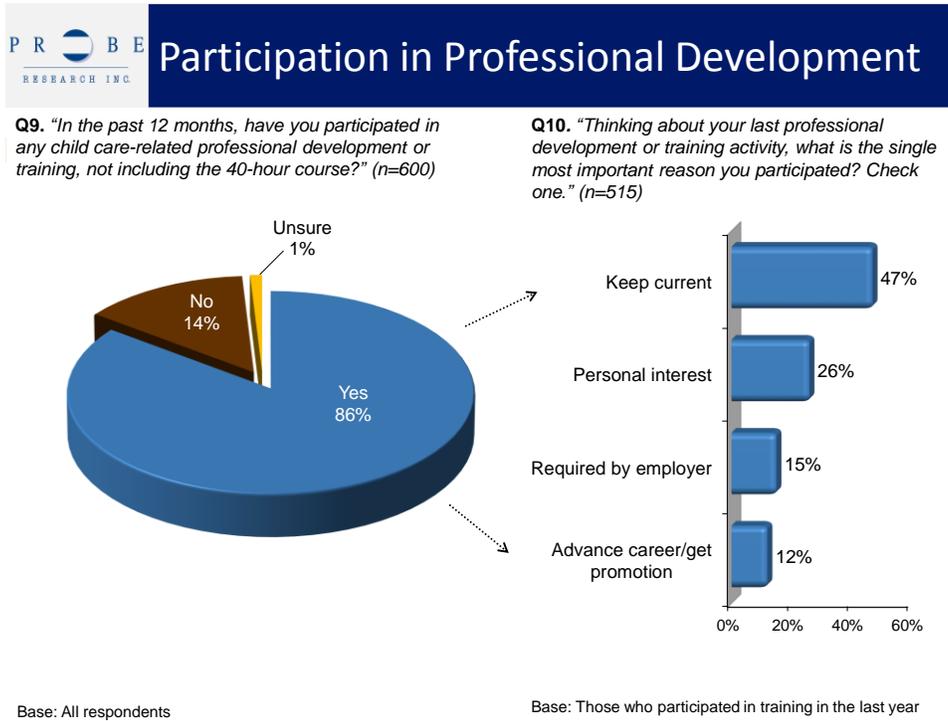
Notable variations among respondents include:

- CCAs and younger members, those 18 to 29, are **more likely** to be upgrading their education (35% and 33% respectively).

### 3.3.4 Participation in Professional Development

An overwhelming majority of respondents (86%) reported participating in professional development sometime in the last year. Almost one-half (47%) indicated the most important reason they participated in professional development was to keep current in their profession.

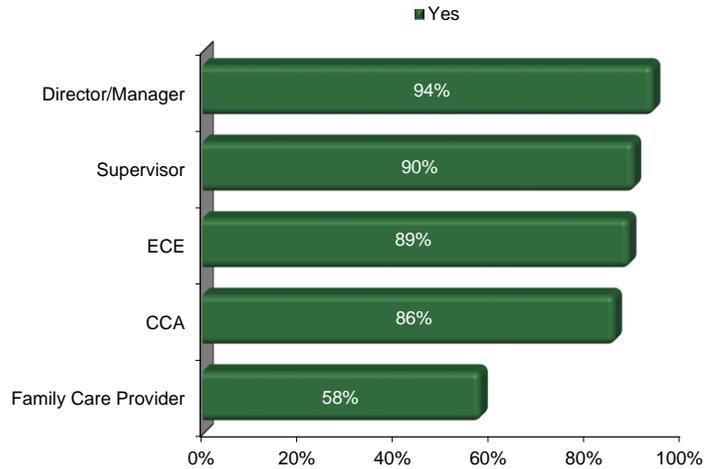
Additionally, respondents were asked whether their job makes good use of their skills and abilities. An overwhelming majority agreed their job always (33%) or at least sometimes (62%) makes full use of their skills.



As the chart below illustrates, centre-based staff were more likely to have participated in professional development than family care providers. For example, nearly nine-in-ten ECEs (89%) reported taking part in training in the last year, while only six-in-ten FCCP's reported doing so (58%).

**PRB E RESEARCH INC.** Participation in Professional Development - by Job Classification -

Q9. "In the past 12 months, have you participated in any child care-related professional development or training, not including the 40-hour course?" (n=600)



Base: All respondents

Notable variations among respondents include:

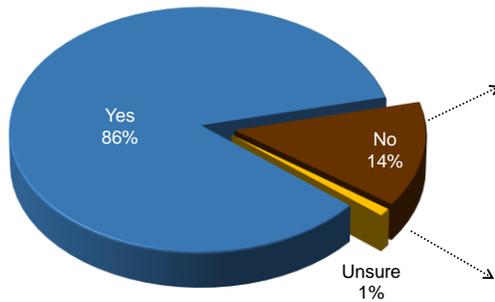
- FCCPs with an ECE II or III designation were more likely to have sought out professional development (76%) than FCCPs without an ECE designation (49%).

### 3.3.4 Non-Participation in Professional Development

Among the relatively small proportion (14%) who reported non-participation in professional development, time appeared to be the largest barrier. More than one-in-five (22%) said they lacked the time to take training and one-in-seven (14%) said they could not get time off work to attend.

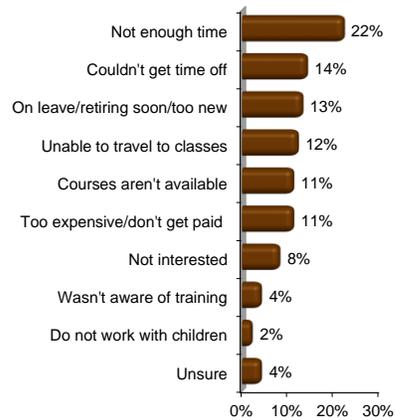
#### PRB E RESEARCH INC. Non-Participation in Professional Development

**Q9.** "In the past 12 months, have you participated in any child care-related professional development or training, not including the 40-hour course?" (n=600)



Base: All respondents

**Q11.** "What is the single most important reason why you have not participated in professional development or training in the past 12 months? Check one."\* (n=85)



Base: Those who did not participate in training.  
\* Caution: Small base

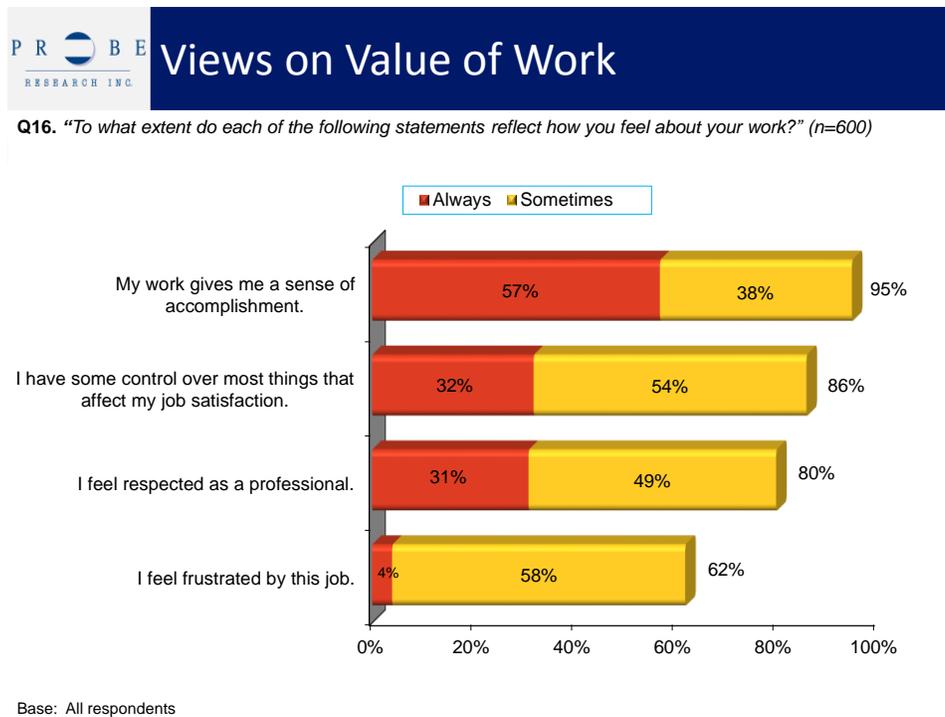
### 3.4 Work Experience and Satisfaction

This section explores the views of MCCA members on their day-to-day work, including their satisfaction levels with particular job features.

#### 3.4.1 Views on Value of Work

MCCA members were asked a series of questions about the value they derive from their work and the esteem others place on it. The vast majority (95%) agreed their work gives them a sense of accomplishment, with 57 per cent agreeing this is “always” the case. A significant majority (87%) said they also have some control over their work. A similar majority (80%) agreed they feel respected as a professional, though one-half (49%) agreed this was true only “sometimes”.

Despite these generally positive feelings, nearly two-thirds of child care staff surveyed (63%) also said they feel frustrated by their work.



Notable variations among respondents include:

- FCCPs are **most likely** to say they “always” have control over most things that affect their job satisfaction (50%), which ECEs are the **least likely** (19%).
- Directors are **more likely** to say their work “always” gives them a sense of accomplishment (69%). Similarly, older workers, those 50-plus, are **more likely** to say their work “always” gives them a sense of accomplishment (63%) compared to younger workers, those 18-29 (49%).
- Supervisors are **more likely** to say they “sometimes” feel frustrated by the job (63%) compared with FCCPs (43%).

### 3.4.2 Views on Additional Aspects of Work

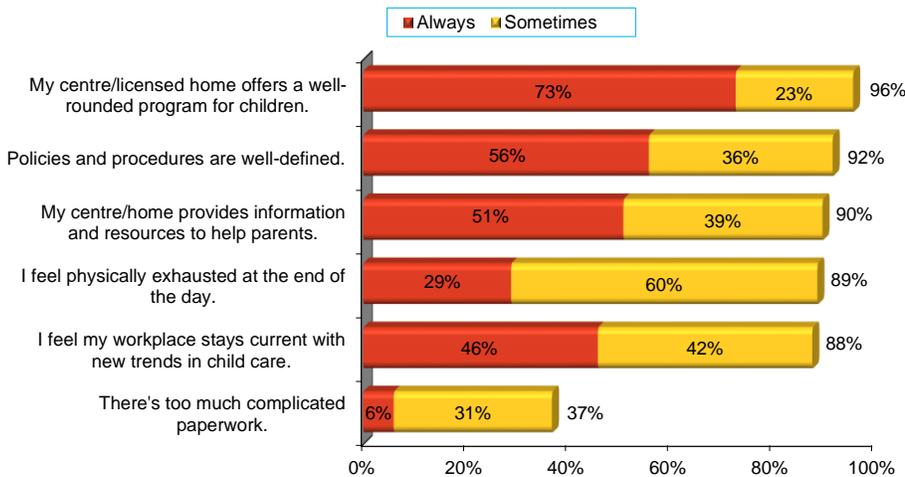
Child care workers were asked a series of additional questions about their work. The overwhelming majority expressed very positive views on the quality of care their facility offers children. Nearly all respondents (96%) said their facility generally offers a well-rounded program for children, and nine-in-ten respondents said facility policies are generally well-defined (92%), information is offered to help parents (90%) and their facility keeps up to date on new trends (88%). Only two-in-five (37%) reported there is too much complicated paperwork.

Despite these positive statements, nine-in-ten respondents (89%) also said they generally felt exhausted by the end of the day.



## Views on Aspects of Work

Q16. "To what extent do each of the following statements reflect how you feel about your work?" (n=600)



Base: All respondents

Notable variations among respondents include:

- FCCPs generally have a more positive view of their child care facility. They are **more likely** to say their workplace “always” stays current with new trends (54%), “always” offers a well-rounded program (88%) and “always” provides parents with information and resources (69%). FCCPs are also **more likely** to say policies and procedures are “always” well-defined (78%). Additionally, FCCPs are also **more likely** to say their job “always” makes good use of their skills (72%).
- ECEs were less likely to say their centre or home “always” offers a well-rounded program (63%), “always” provides information and resources to parents (43%) or “always” stays current with new trends (38%). ECEs were also less likely to say they “always” feel respected as a professional (24%).
- Interestingly, younger workers, those 18-29, are **more likely** to say their work “always” leaves them physically exhausted by the end of the day (36%) compared with older workers, those 50-plus (19%).
- Not surprisingly, directors were **more likely** to say there’s “always” too much

complicated paperwork (21%). However, FCCPs, who might also be expected to cope with paperwork as facility managers, expressed views roughly on par with the survey’s average.

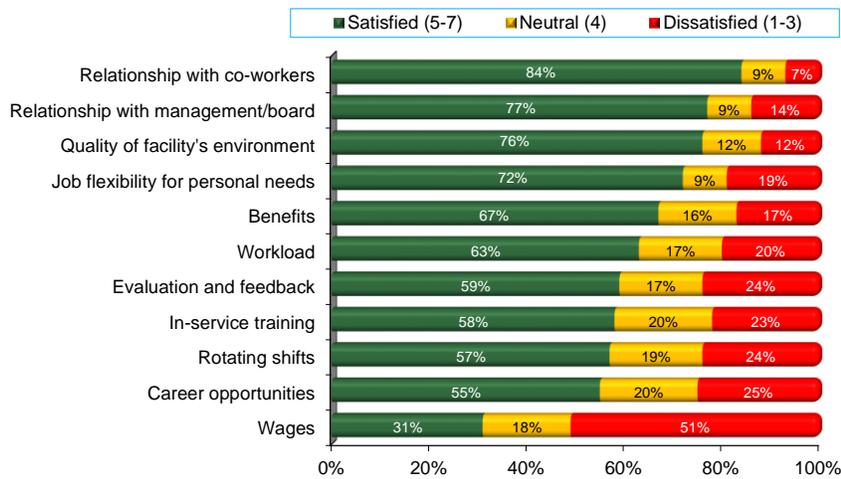
### 3.4.2 Satisfaction with Aspects of Work

Members were asked how satisfied they are with 11 aspects of their work. Child care staff were generally most satisfied with their relationship with co-workers (84%) and management (77%) as well as the quality of their centre or home’s environment (76%) and their job flexibility (72%). Child care staff were significantly less satisfied with their wages (31%).



## Satisfaction with Aspects of Work

**Q15.** “How satisfied are you with the following aspects of your job? Please use the 7-point scale, where 1 means very dissatisfied and 7 means very satisfied.” (n=600)



Base: All “applicable” respondents

Notable variations among respondents include:

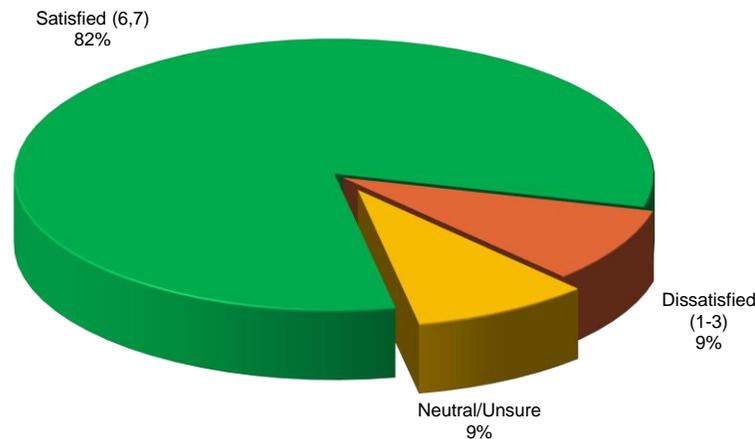
- Directors are **more likely** to be satisfied with their relationship with the board (88%) and their co-workers (91%), with their career opportunities (70%), with their wages (49%), benefits (79%) and job flexibility (82%). However, directors are **less likely** to be satisfied with their workload (48%).
- CCAs are **more likely** to be satisfied with their workload (69%) but **less likely** to be satisfied with their wages (23%).
- FCCPs are **more likely** to be satisfied with evaluation and feedback (81%) and with the quality of their facility’s environment (93%). However, they are **more likely** to be dissatisfied with their benefits (51%), their career opportunities (37%) and their relationship with their co-workers (25%).
- Respondents who predicted they would remain in child care in three years were **more likely** to be satisfied with their workload (64% satisfied) than those who predicted they would not remain in child care (44% satisfied). Similarly, respondents who plan to remain in the field were **more likely** to be satisfied with their career opportunities (54% satisfied) than those who plan to leave the field (22% satisfied). Finally, those who plan to remain in child care were **more likely** to be satisfied with the quality of their facility’s

environment (76% satisfied) compared with those who plan to leave the field (58% satisfied.)

### 3.4.3 Overall Job Satisfaction

The overwhelming majority of respondents (82%) said they were satisfied overall with their job. More than one-in-five (21%) said they were very satisfied with their job overall (“7” on a one-to-seven scale).

Less than one-in-ten (9%) were dissatisfied overall with their jobs.



Base: All “applicable” respondents

Notable variations among respondents include:

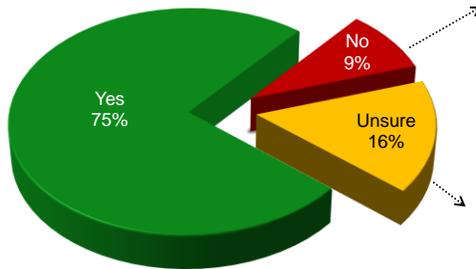
- ECEs tended to be the **least satisfied** (78%) compared to directors, who are the **most satisfied** (88%).
- Respondents who predicted they would leave the child care field within three years were **less likely** to be satisfied overall with their jobs (55%).

### 3.4.4 Views on Future Employment in Child Care

Three-quarters of surveyed child care workers (75%) plan to be working in child care in three years, although one-quarter were unable to predict whether or not they would remain in the field by 2020.

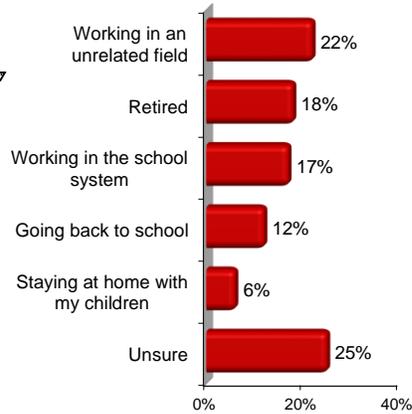
**PRBE** RESEARCH INC. **Views on Future Employment in Child Care**

**Q17.** "Looking to the future, do you expect to be working in child care in three years?" (n=600)



Base: All respondents

**Q18.** "What do you expect to be doing?"\* (n=148)



Base: Respondents unlikely to be working in child care  
\*Caution: Small base

Notable variations among respondents include:

- Younger workers, those 18 to 29, were **less likely** to anticipate they would be working in child care in three years (65%) than workers aged 40 to 49 (84%).
- CCAs were also **less likely** to say they would be working in child care in three years (69%) compared to directors (83%).

### 3.5 Wages and Benefits Provided to Child Care Centre Employees

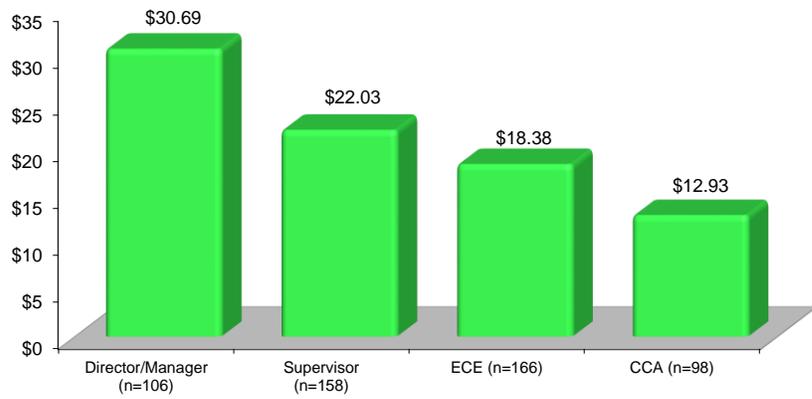
This section explores the wages, vacation days and other benefits typically provided to child care staff.

#### 3.5.1 Average Hourly Wages for Child Care Centre Employees

Directors and managers working child care centres typically earn an hourly wage of \$30.69 while CCAs and trainees make, on average, \$12.93 per hour.

**PRBE RESEARCH INC.** **Average Hourly Wages by Classification**

Q19. "What is your hourly pay, before deductions and bonuses?"



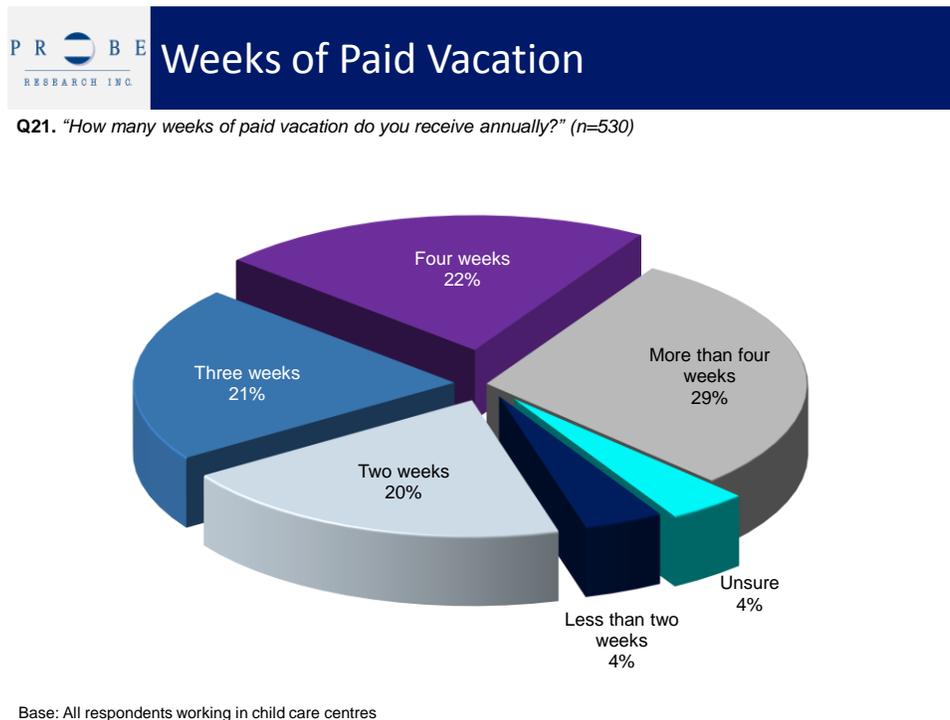
Base: All centre staff

Notable variations among respondents include:

- Younger child care employees, those 18 to 29, make an average hourly wage of \$15.77 while older workers, those 55-plus, earn on average \$23.90 an hour.

### 3.5.2 Paid Vacation for Child Care Centre Employees

One-half of the child care centre employees surveyed (51%) reported receiving four weeks or more vacation annually, while one-in-five (21%) reported receiving three weeks.

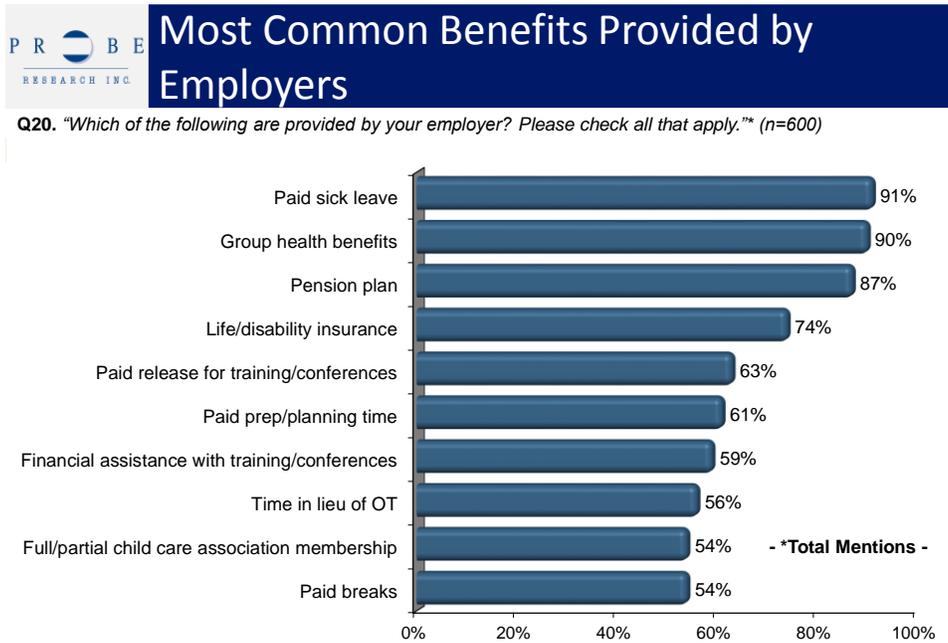


Notable variations among respondents include:

- Directors are **more likely** to have more than four weeks of vacation (58%) while ECEs are **less likely** (14%).
- Not surprisingly, age is a determining factor in vacation time. For example, younger workers, those 18 to 29, are **more likely** to have only two weeks of vacation (40%) and **far less likely** to have four-plus weeks (1%). Older workers, those 50-plus, are more likely to have four-plus weeks of holiday (47%).

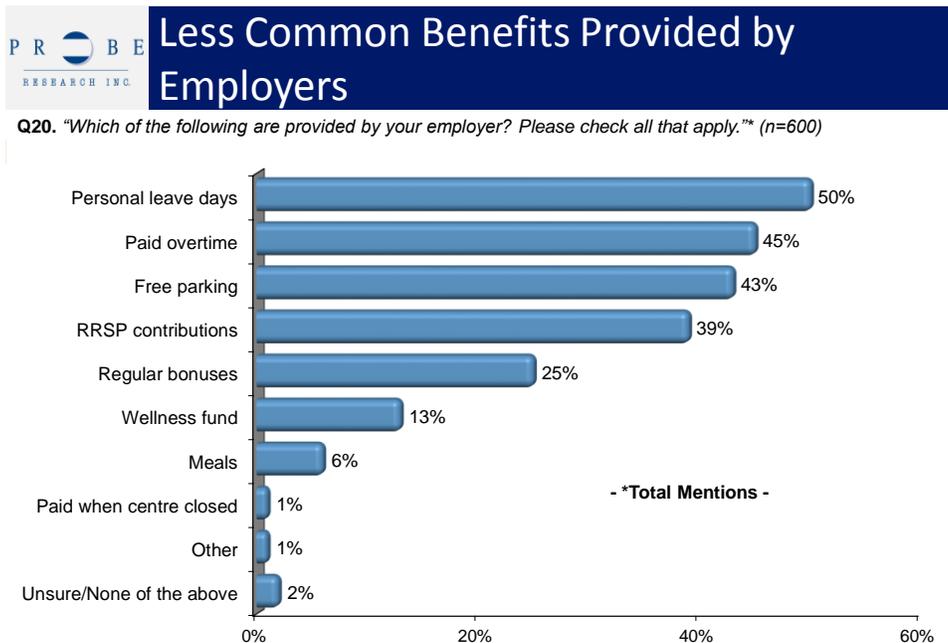
### 3.5.3 Additional Benefits Provided to Child Care Centre Employees

An overwhelming majority of child care workers report having paid sick leave (91%), group health benefits (90%) and a pension plan (87%).



Base: All respondents

Respondents reported that it was less common to receive meals (6%), a wellness fund (13%) or regular bonuses (25%).



Base: All respondents

Notable variations among respondents include:

- Directors were **more likely** to report having life and disability insurance (83%) than CCAs (61%). Similarly, older workers, those 50-plus, were more likely to report having such insurance (80%) compared to younger workers, those 18-29 (63%).
- Directors were also **more likely** to report access to training opportunities than lower-tier employees such as CCAs or ECEs. For example, 76 per cent of directors report having paid release time for training while only 57 per cent of CCAs report this benefit. Similarly, 70 per cent of directors enjoy financial assistance to attend workshops and conferences while only 44% of CCAs report this benefit.
- Directors are also **more likely** to receive time in lieu of overtime (70%) compared with CCAs (44%).
- Rural members are **less likely** to receive financial help with professional memberships (41%), RRSP contributions (28%) or access to a wellness fund (3%). However, they are **more likely** to enjoy free parking (61%).
- Respondents who are not likely to be working in child care in three years are slightly less likely to report receiving life or disability insurance (62%) or paid time to attend training (53%).

### 3.6 Views and Experiences of Family Child Care Providers

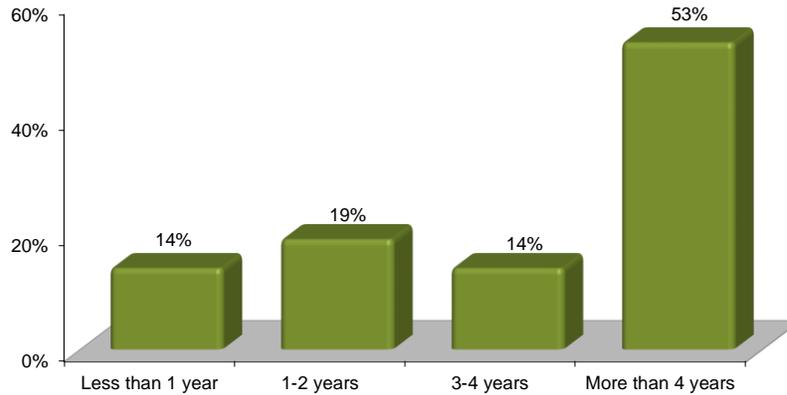
This section explores the finances and operation hours of family child care providers (FCCPs) as well as their preferred business model and their experience opening their child care facility.

#### 3.6.1 Child Care Tenure and Forecast

A majority of FCCPs surveyed (53%) have been licensed child care providers for more than four years. However nearly the same proportion (47%) have been delivering child care for less than four years.



Q29. "How long have you been a licensed family child care provider?" (n=70)

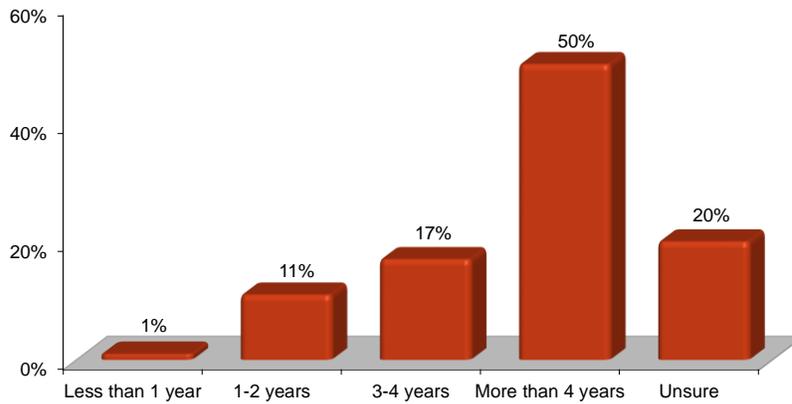


Base: Family child care providers

One-half of all FCCPs surveyed (50%) expect to be licensed child care providers for at least another four years. However, more than one-in-four (28%) expect to remain in business for less than four years.

**PRBE** **Family Child Care Forecast**  
RESEARCH INC.

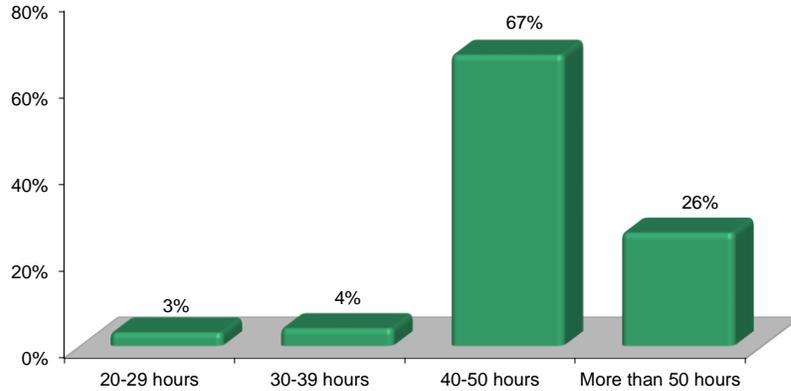
**Q30.** "How much longer do you plan to continue as a licensed family child care provider?" (n=70)



Base: Family child care providers

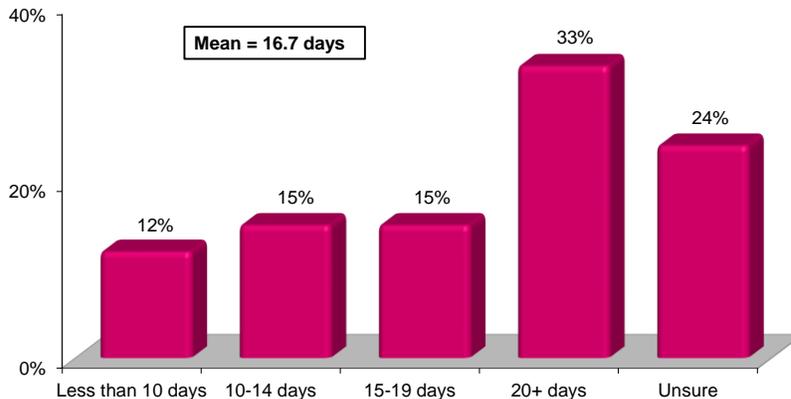
### 3.6.2 Weekly and Annual Hours of Operation

A significant majority of FCCPs (67%) provide child care for 40 to 50 hours per week with one-in-four (26%) reporting that they have children in their care for more than 50 hours per week.



Base: Family child providers

FCCPs report a range of days they close annually. One-in-three report being closed 20-plus days per year. However, a higher proportion (42%) report being closed less than 20 days per year. One-in-four respondents was unsure about their closure days.

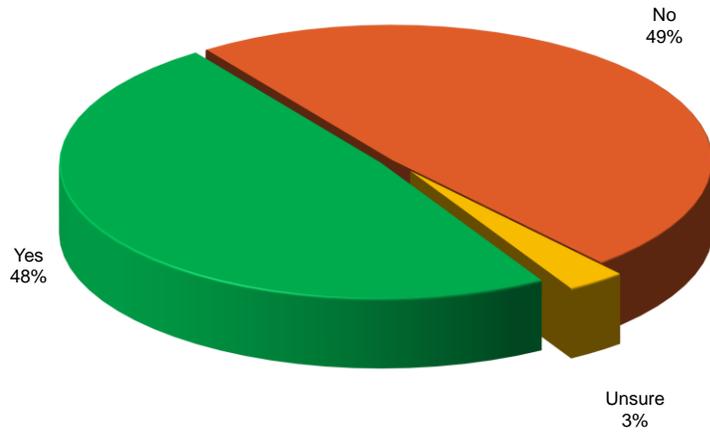


Base: Family child care providers

One-half of FCCPs (49%) reported that they do not have a reliable substitute able to care for children during annual closure days. However, a similar proportion (48%) reported that they do have a reliable option for parents.

**PREBE** RESEARCH INC. **Prevalence of Substitute Care**

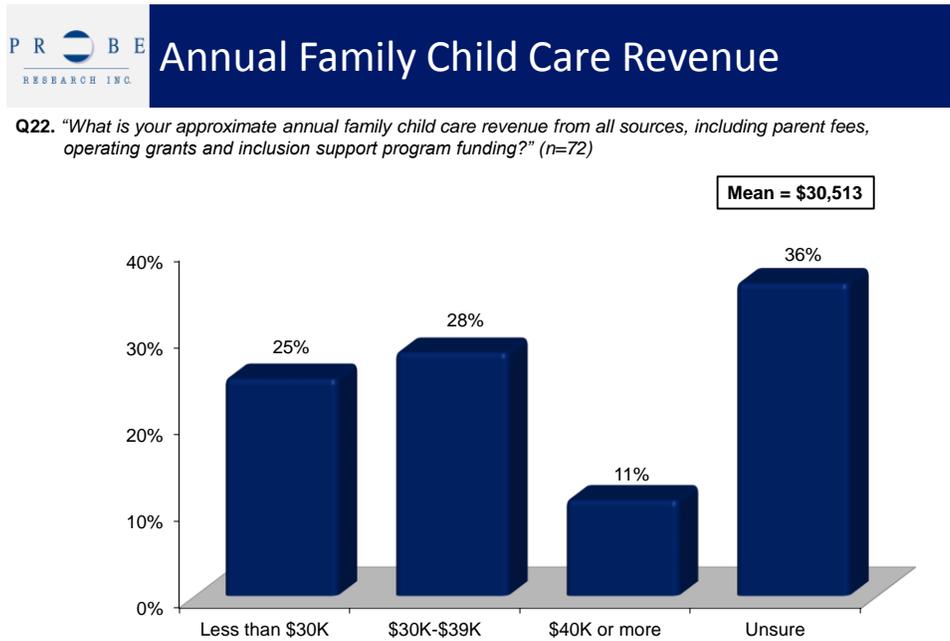
Q28. "Do you have a reliable substitute when you're closed?" (n=70)



Base: Family child care providers

### 3.6.3 Income and Expenditures

The FCCPs surveyed reported earning an average annual revenue of \$30,513. However, a significant proportion of respondents (36%) noted they were unsure of their revenue figure.



Base: Family child care providers

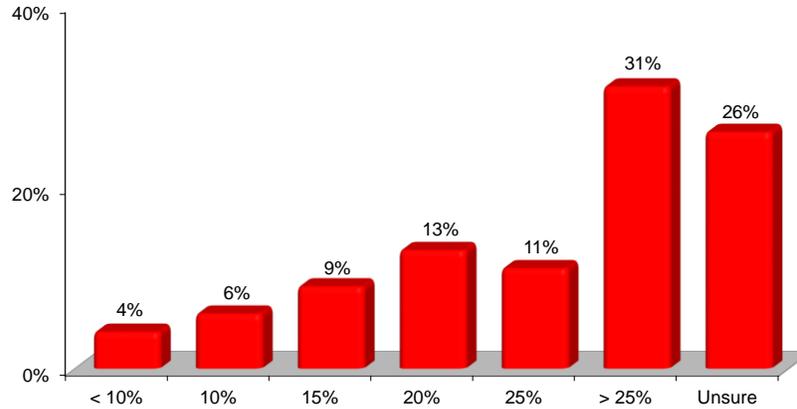
Similarly, FCCPs who have opted out of the operating grant were asked to provide their full day rate for infants, pre-schoolers and school-aged children. An insufficient number of responses were received to allow for reporting.

One-third of FCCPs (31%) report spending more than a quarter of their revenue on program expenses. However, as the chart on the following page illustrates, a significant proportion of respondents (26%) were unsure as to the proportion of their income spent on program expenses.

**PRBE**  
RESEARCH INC.

## Family Child Care Expenses

Q24. "What percentage of your annual income do you usually spend on children's program expenses?" (n=70)



Base: Family child care providers

FCCPs were also asked about their total annual tax deductions for business-use of home or car. The majority of those surveyed, 83 per cent, were unsure or unable to provide a figure.

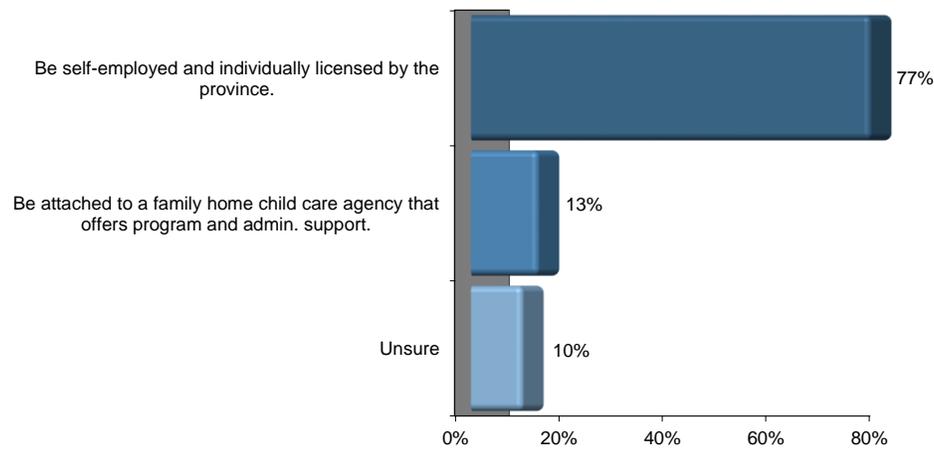
### 3.6.4 Preferred Family Child Care Model

Most FCCPs (77%) prefer to be self-employed and individually licensed by the province. Only one-in-eight (13%) preferred an alternate model that would see FCCPs attached to an agency able to offer support and administrative services.

**PRBE**  
RESEARCH INC.

## Preferred Family Child Care Model

Q31. "There are various models of delivering licensed family child care. Which approach do you prefer?" (n=70)



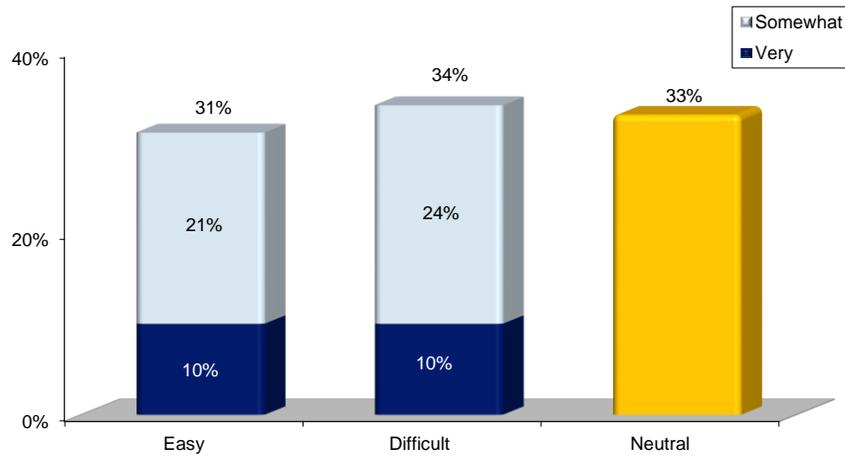
Base: Family child care providers

### 3.6.5 Views on Process of Opening Home-Base Child Care

FCCPs were split on their views about the paperwork and processes involved in opening their home-based child care facility. One-third (31%) reported that the process was very or somewhat easy while a similar proportion (34%) reported that the process was difficult. A significant proportion of respondents (33%) offered a more middling impression of the administrative and bureaucratic challenges of opening a home-based child care facility.

**PRBE RESEARCH INC.** **Views on Process of Opening Home-Based Child Care Facility**

**Q32.** "Now, please think back to the process and paperwork involved in opening your home-based child care business. How easy or difficult was it to set up your home-based child care business?" (n=70)

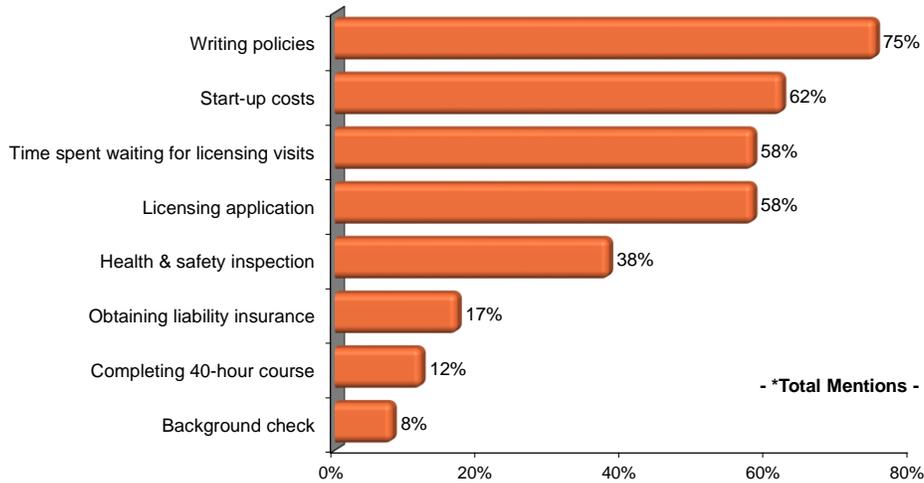


Base: All family child care providers

The small number of respondents who reported having difficulty with the process of opening their home-based business were asked to identify the parts of the process that were difficult. Three-in-four (75%) identified the writing of policies while three-in-five identified start-up costs (62%), the wait for a licensing visit (58%) and the licensing application (58%).

**PRBE RESEARCH INC.** **Reasons for Difficulty Opening a Home-Based Child Care Facility**

Q33. "Thinking still of the process of setting up your home-based child care facility, what made it difficult? Please check all that apply."\* (n=24)\*\*



Base: Family child care providers who said the process was "difficult"  
 \*\*Caution: Small base

### 3.7 Views and Experiences of Child Care Centre Directors

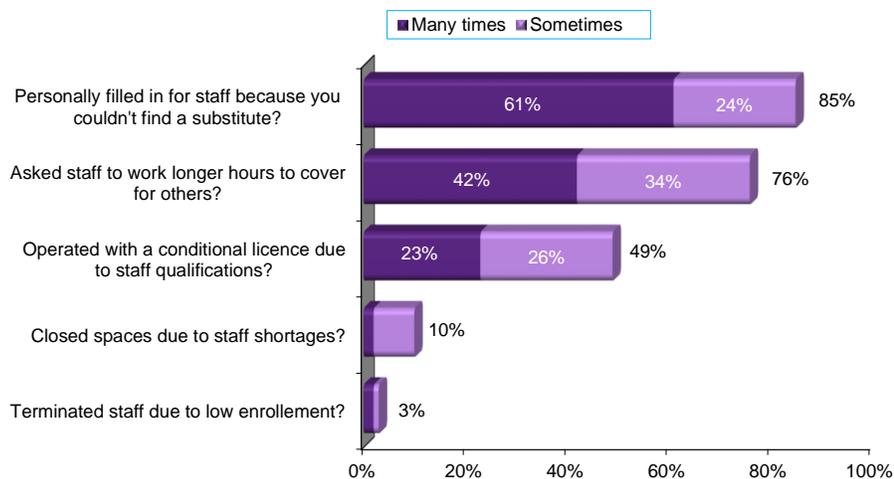
The section explores the experiences of child care centre directors with staff shortages and recruitment and with other operational challenges.

#### 3.7.1 Experience with Staff Shortages

A significant majority of centre directors (85%) have personally filled in for staff due to shortages over the last year or have asked staff to work longer hours (76%). One-half of all directors surveyed (49%) said they had operated with a conditional licence due to a shortage of qualified staff. Far fewer directors (3%) reported terminating staff due to low enrollment.

#### PRBE RESEARCH INC. Experience with Staff Shortages

Q37. "In the last year, how often have you...?" (n=106)



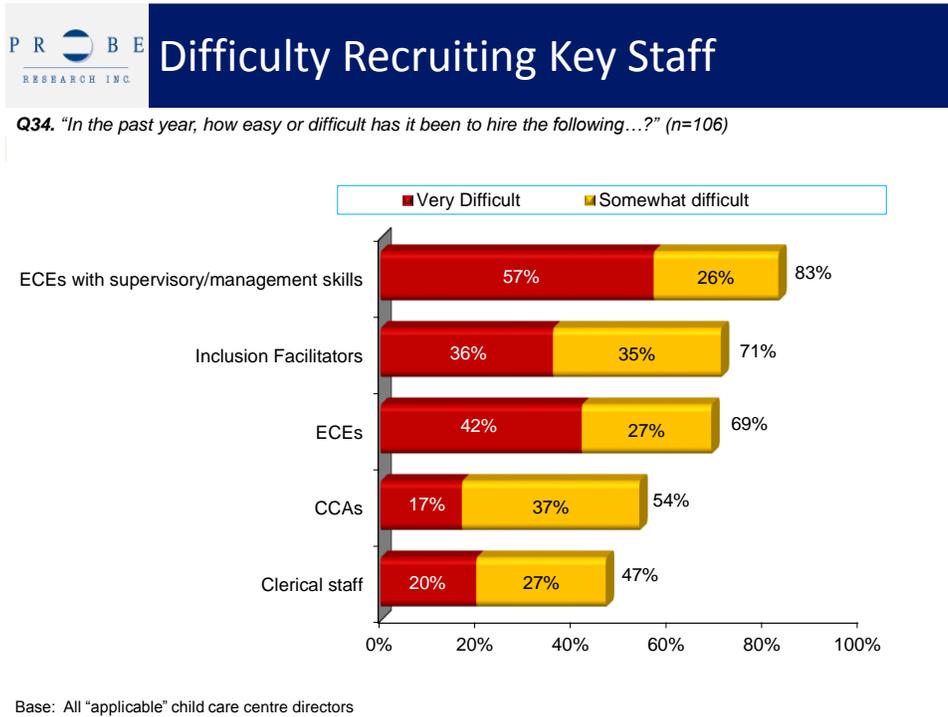
Base: All centre directors

Notable variations among respondents include:

- Directors in rural Manitoba were **more likely** to have personally filled in for staff (92% said they did so sometimes or many times versus 83% among Winnipeg directors). Rural directors were also more likely to have operated with a conditional licence (59% said they did so sometimes or many times versus 46 per cent among Winnipeg directors).

### 3.7.2 Difficulty Recruiting Key Staff

Directors reported significant difficulty recruiting ECEs with supervisory or management skills and inclusion facilitators. More than four-in-five directors (83%) said it was very or somewhat difficult to hire ECEs with management skills, while 71 per cent said it was very or somewhat difficult to hire inclusion facilitators. It was somewhat easier to recruit CCAs and clerical staff, though approximately one-half of directors surveyed still reported difficulty hiring for those positions (54% and 47% respectively).



The notable variations among respondents were based on region, including:

- Centre directors in rural Manitoba were **more likely** to experience difficulty recruiting CCAs (68%), Inclusion facilitators (76%) and clerical staff (57%).

### 3.7.3 Reasons for Difficulty Recruiting Key Staff

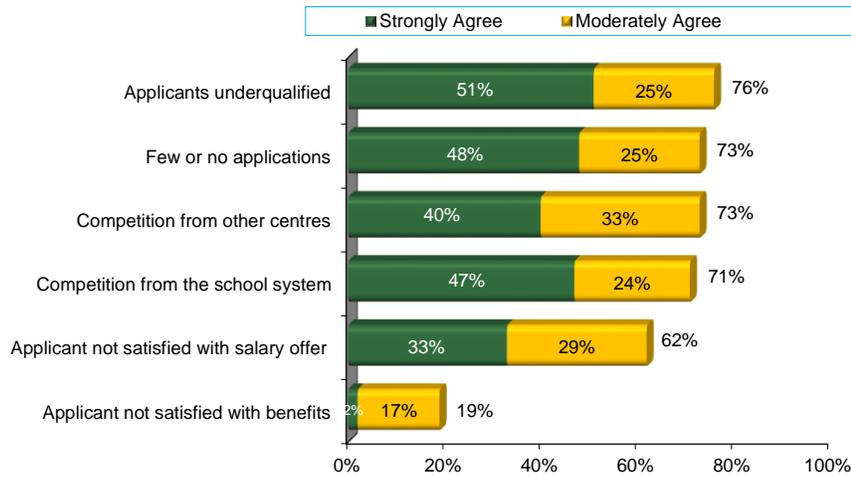
A majority of directors cited underqualified applicants (76%), a lack of applicants (73%) and competition from other centres (73%) or the school system, (71%) as the top reasons they have difficulty recruiting staff.

Directors were also asked if there are any other factors not mentioned that affect their ability to recruit. Nearly one-in-four (23%) cited the overall quality of applicants and nearly one-in-ten (9%) cited the hours or rotating shifts available to prospective staff.



## Reasons for Recruitment Difficulties

Q35. "Thinking about the last year, please tell us if you agree or disagree that the following factors have affected your ability to recruit qualified employees..." (n=96)



Base: All "applicable" child care centre directors

### 3.7.4 Top Challenges for Child Care Centre Directors

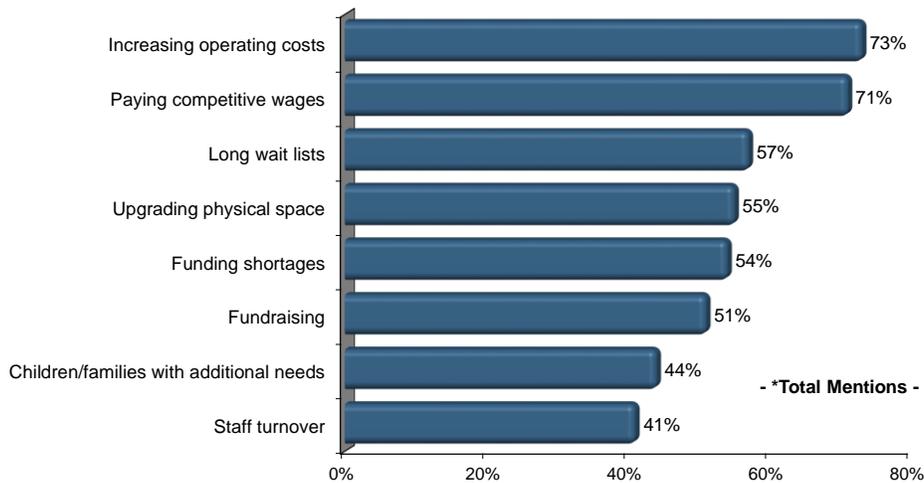
Directors identified financial issues as their top challenges. Seven-in-ten directors cited increasing operating costs (73%) or the challenge of paying competitive wages (71%) as a top challenge. Funding shortages (54%) and fundraising (51%) were also cited.

It is worth noting that, in a related survey done by Probe Research of 3,100 parents using child care in Manitoba, 43 per cent of parents serving on their centre’s board of directors agreed they are worried about their centre’s finances.



## Top Tier Challenges for Centre Directors

Q38. "Which of the following are challenges for your child care centre? Please check all that apply."\* (n=106)

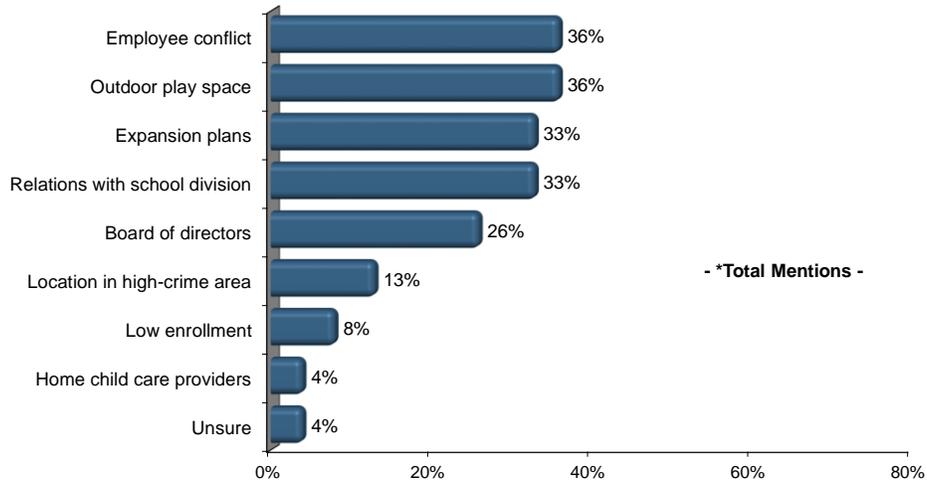


Base: Child care centre directors

Centre directors were less likely to cite low enrollment (8%) or issues with home child care providers (4%) as top-of-mind challenges.

**PRBE** RESEARCH INC. **Lower Tier Challenges for Centre Directors**

Q38. "Which of the following are challenges for your child care centre? Please check all that apply."\* (n=106)



Base: Child care centre directors

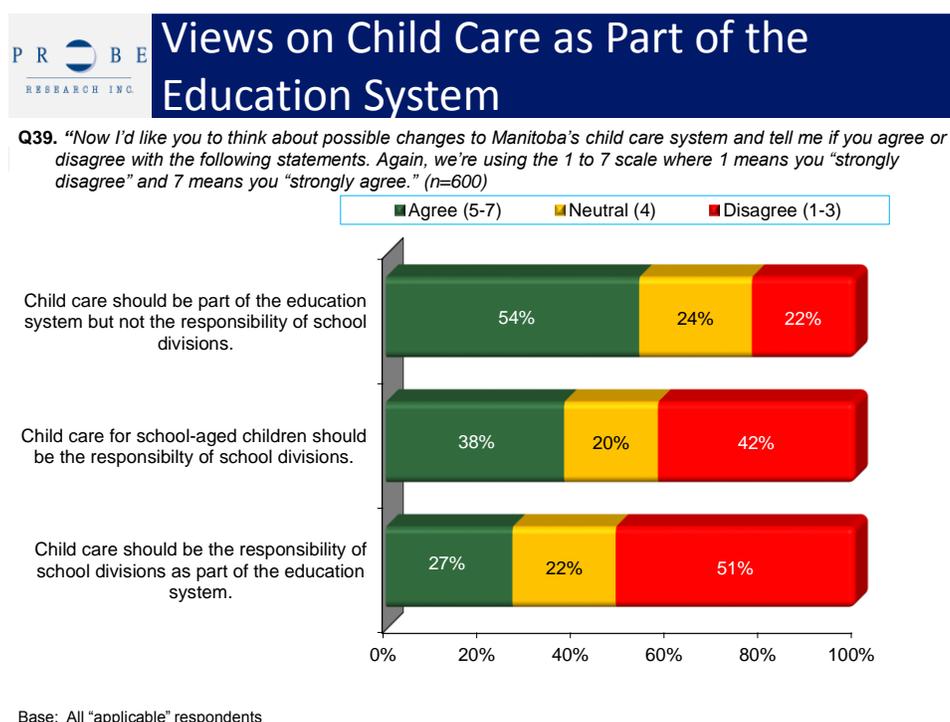
### 3.8 Views on Possible Changes to Manitoba's Child Care Policy

MCCA members were asked their views on a series of possible changes to Manitoba's child care system, including more integration with the education system.

#### 3.8.1 Views on Child Care as Part of the Education System

MCCA members offered a nuanced view of the issue of increased integration of child care within the education system. A small majority (54%) favour a move to make child care part of the education system but **not** the responsibility of school divisions. Only one-in-four respondents (27%) favour school board control over child care. Slightly more (38%) favour making **only** care for school-aged children the responsibility of school divisions.

It is worth noting that parents are generally more supportive of bringing child care under the education system. In a related survey, 75 per cent of parents with children in care agreed child care should be part of the education system.



Notable variations among respondents included:

- Directors (61%) and FCCPs (62%) were **more likely to disagree** that child care should be the responsibility of school divisions as part of the education system. Among early childhood educators, only 42 per cent disagreed.
- Winnipeg members were **more likely to disagree** that child care for school-aged children should be the responsibility of school divisions (45%). Only 34 per cent of rural members disagreed with this statement.

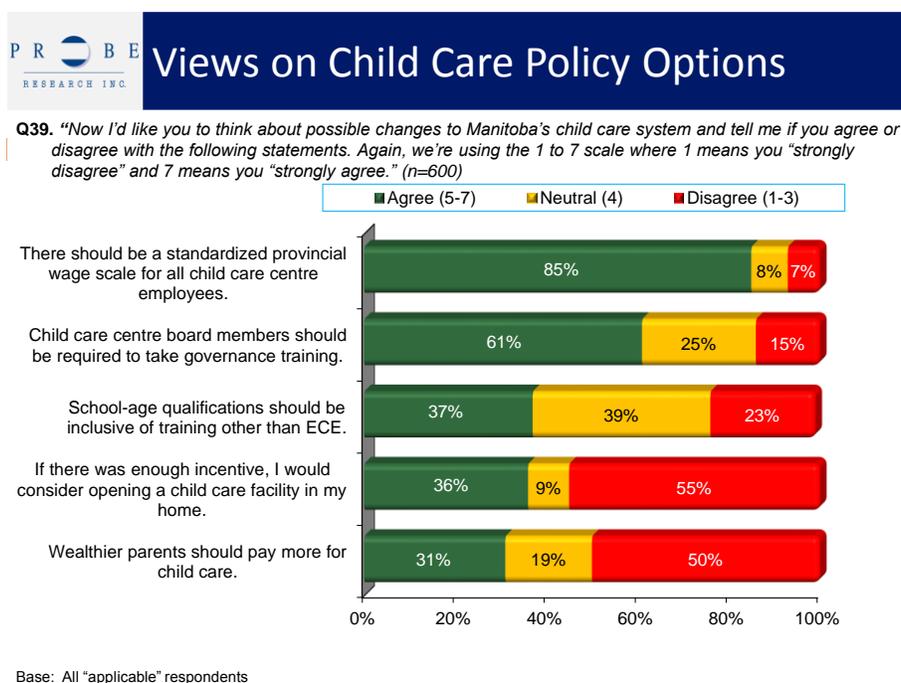
### 3.8.2 Views on Child Care Policy Options

A significant majority of members (85%) agreed there should be a standardized provincial wage scale for child care centre employees. A majority (61%) also agreed governance training should be mandatory for centre board officials.

MCCA members were split on the whether school-age qualifications should be inclusive of training other than ECE. Nearly two-in-five respondents agreed qualifications should be inclusive, but a significant proportion (39%) who were neutral or unsure on the question.

Members were also somewhat divided on whether or not they would consider opening a home-based child care business, were there to be enough incentive. More than one-half (55%) said they would not consider this, however more than one-third (36%) agreed they might consider opening a home-based child care facility.

Additionally, members were split on whether wealthier parents should pay more for child care. A bare majority (50%) said wealthier parents should not pay more for child care, though nearly one-third (31%) felt some kind of means test might be appropriate to determine how much users should pay for child care. It is worth noting that parents were more likely to oppose a policy change that would see wealthier parents pay more for child care. In a related survey of parents, 20 per cent favoured a means test and 63 per cent opposed it.



Notable variations among respondents include:

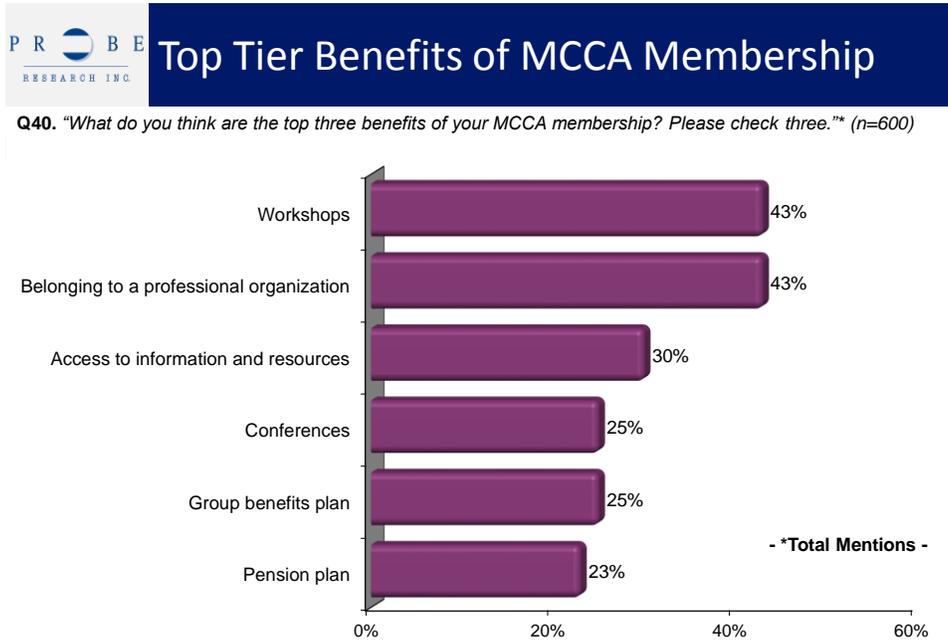
- Child care centre supervisors and administrators were **more likely** to agree that school-age qualifications should be inclusive of training other than ECE (46%) compared with ECEs (28%) and FCCPs (24%).
- Age and job classification appear to influence a member's willingness to open a home-based child care facility. Younger respondents, those 18-29, were **more likely** to agree they would consider such a move (54%) compared with older respondents, those 50-plus (23%). Similarly, centre directors were **less likely** to agree they would be willing to start a home-based facility than CCAs (10% vs. 50%).

### 3.9 Views on MCCA Membership

This chapter explores the preferences and satisfaction of respondents regarding their membership in the MCCA.

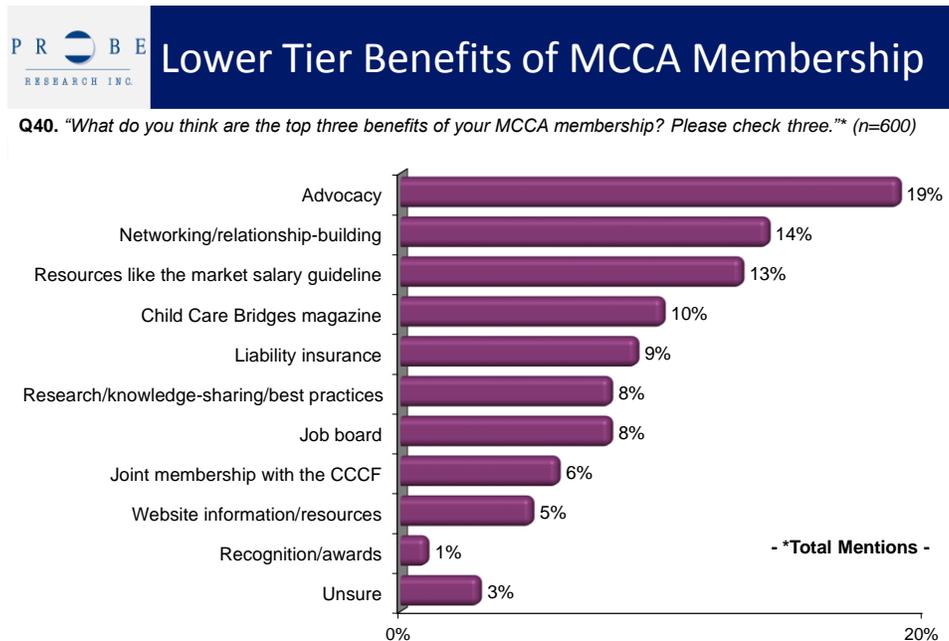
#### 3.9.1 Benefits of MCCA Membership

Respondents viewed workshops (43%) and belonging to a professional organization (43%) are the top benefits of their MCCA membership. Nearly one-third (30%) also cited access to information and resources.



Base: All respondents

Less important to MCCA members are recognition and awards (1%), website information (5%) joint membership with the CCCF (6%) and the job board (8%).



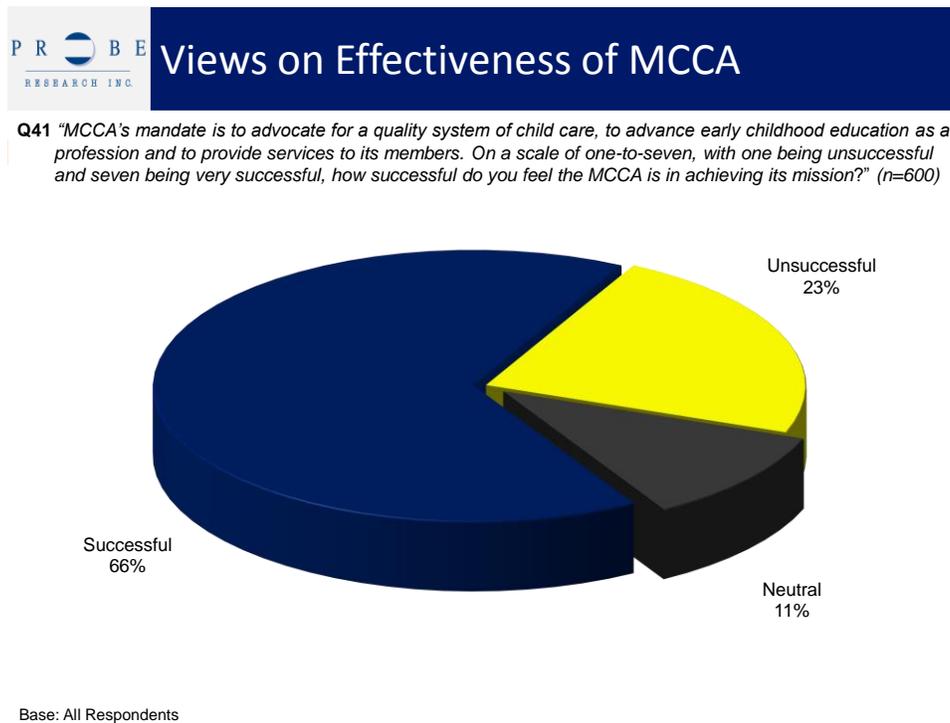
Base: All respondents

Notable variations among respondents include:

- ECEs (58%) and CCAs (53%) were **more likely** to value workshops than directors (28%) or FCCPs (15%).
- FCCPs were **more likely** to value belonging to a professional organisation (58%) than CCAs (35%). Similarly, older members, those 40-49, were **more likely** to value belonging to a professional organization (52%) compared with younger members, those 18-29 (35%).
- CCAs (44%) and FCCPs (40%) were **more likely** to value access to information and resources than directors (21%) or ECEs (23%).
- Rural members were **more likely** to value conferences (33%) than Winnipeg members (22%).
- Directors (30%) were **more likely** to value advocacy than CCAs (9%) or FCCPs (8%).
- Directors were also **more likely** to value the market salary guide (26%) than FCCPs (4%).
- FCCPs were **more likely** to value liability insurance (43%) than all other job classifications.

### 3.9.2 Satisfaction with MCCA

Two-thirds of respondents (66%) said the MCCA is successful at achieving its mandate. However, nearly one-in-four (23%) said the MCCA's is unsuccessful.



Notable variations among respondents include:

- Directors were **more likely** to say the MCCA is successful at achieving its mandate (76%) compared to FCCPs (61%), ECEs (63%) and CCAs (63%).